

# **SAP ARIBA**

#### PROCUREMENT SERVICES DIVISION

**END-USER TRAINING** 

Guided Buying General Overview Navigation





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## **GUIDED BUYING**

# <u>Agenda</u>







# **GUIDED BUYING**

## **Business Process**

#### **Overview**

The purpose of this simulation is to show access, general nvaigation, and user preferences in SAP Ariba Guided Buying.

#### Trigger

A school user needs to access Guided Buying.

#### Result

Successfully access Guided Buying and manage user preferences

#### Application

SAP Ariba Guided Buying







# GUIDED BUYING Access





## **GUIDED BUYING: Access**

### 01 Access ESS

Enter HTTPS://ESS.LAUSD.NET in the address field of a web browser

👻 🔇 Sign In	×	+	_		×
< → C ⋒	= HTTP	S://ESS.LAUSD.NET	☆		÷
				All Bookn	narks



### **Enter Single Sign On (SSO)**

Enter your full LAUSD email address and password to Log In. e.g. (msmith@lausd.net, mary.smith@lausd.net)

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÷	⇒ C	Ŵ	•=	signon.lausd.	net/adfs/ls/	?SAMLRequest=	fZFdS8N	/wFlb%2FSsl9mnS0bgtroVCUwpTh1AtvJCYnLpAmtS	☆	•	÷
										All Book	marks
		4	=			-		someone@example.com Password Sign in			•
								Enter your full LAUSD email address and password Log In. e.g (msmith@lausd.net, mary.smith@lausd.net) © 2018 Microsoft Home	d to		



# **GUIDED BUYING: Access**

### 03 Click 'Ariba Shopping Cart' tab

This one of the main available tabs.

### 04 Click 'Ariba Shopping Cart' tile

Based on your access/role, **Ariba Shopping Cart** tile may be one of the tiles available under **Ariba Shopping Cart** tab.











#### LAUSD Logo

The LAUSD logo at the top left corner acts as **HOME** button.



#### **»**

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#### Notifications

Click the bell icon at the top right corner to read the **notifications** sent to you.

I Ariba Buying			<b>⊥</b> 2 ⊚	MR
		Notifications		/
*	Find goods and services	Receive: 8000030070 April 30, 2024		
				?
Shop Your favorites Your request	s Your approvals			

Click the Announcement to read the message.





#### Notifications (con't)

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Read the popup message. Click **Close** when done.

Ariba Buying		
in the second seco	Announcements	×
	Year End Cut Off Year-end cutoff dates from General Stores Distribution. Regular Deliv	>
Shop Your favorites Your requests		
	Mark all as read	

#### **Shopping Cart**

Shopping Cart icon located at the top right corner.

> The selected items placed in your **Shopping Cart** will remain in the cart until you are ready to place your order.

Ariba Bu	ying	ਬ	R
/	Find goods and services		?
Shop Your favorites	Your requests Your approvals		1

Help

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Help icon located at the top right corner.

> Click the icon to <u>open/close</u> the **Help** menu.

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		Find goods	and services	٩			
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Shop You	ur favorites	Your requests	Your approvals				

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Use the **Search** field to look for more **Help** topics.

Click **Documentation** to show the question mark icon? for help and tips.

> Mouse over the question mark icon ? to read about each item.

CAUSE Ariba Buying		
		Help Topics
Find goods and services	٩	Search Help Topics
		What's this page?
z		New brand name
Shop Your favorites Your requests Your approvals		Notification bell
		Search
New A A A A A A A A A A A A A A A A A A A	Request on be 🖄	Account Settings menu
Year End Cut Off Year-end cutoff dates from General Stores Distribution Regular Deliveries 6	Buy with a team &	Shop
Deliveries: 6/14/2024 9:00am Overnight Deliveries: 6/20204 12:00pm Will-C	Recent requests	Your favorites
		Your requests
UNIFIED	testing	Your approvals
	\$2,500.00 USD Requested 20 days	Recent requests
	ago	Documentation
	PR2128 Submitted	

#### Search

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The main Search field allows you to search for goods and services on all catalogs.

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	Find goods and services	٩					
/						?	
Shop Your favorites	Your requests Your approvals						

EXAMPLE: Use the Search field to look for laptop case.

- > Enter the words 'laptop case' in the Search field.
- $\succ$  Click the magnifying glass icon  $\mathbb{Q}$  to activate search.
- Select the item that best fits your needs. [see End-User Training: Purchasing on how to order.]

Ariba Buying	4° ₩ ® R 4	SEARCH CRITERIA
Shop Your favorites Your requests Your approvals	Ariba Buying	laptop case
<ul> <li>SEARCH RESULT</li> <li>➢ An item from IT Depot</li> <li>➢ An item from General Stores</li> </ul>	<pre>Refine catalog results by Supplier General Stores Warehouse 1 Tr Depot 1 Material Group 20500 1 Plant 2000 1 4000 1</pre>	<section-header><section-header><complex-block><image/><complex-block><complex-block></complex-block></complex-block></complex-block></section-header></section-header>

Shop

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**Shop** will show notification and various shopping options as tiles.

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		Find goods	and services	٩			
/	7						?
Shop	favorites	Your requests	Your approvals				

This is a notification tile, which will show important messages.

> In this example, the message is regarding 2024 Year-End Cut-Off.

Ariba Buying			С <mark>3</mark> к	
	Find goods and services	٩		?
Shop Your favorites Your requests New Year End Cut Off Year-end cutoff dates from General \$I	Your approvals	18.00pm Same Day	Request on behalf of Buy with a team	යි දු
Learn more	ht Deliveries: 6/20204 12:00pm Will-Call: 6/24/	2024 5:00pm	Recent requests PR1863 testing \$2,500,00,USD	Submitted
			Requested 20 days ago	

#### Shop (con't)

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The main shopping tiles are...

- General Stores Warehouse
- ITS Tech Depot
- Request a Non-Catalog Item
- Request for Procurement Action

The **Shop** section also includes Recent Requests on the right-hand column.

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#### Your Favorites

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This is where your Favorite items will be listed.

- Click Create a list based on your needs such as New Hire, Projects, Class Tasks, etc.
  - Enter the name of the list on the **Enter list name** field.
  - Add/delete created list as needed.
  - This will help organize your commonly purchased items.
- Create as many lists as needed.

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Find goods and services	
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	Create a list
Get started with favorites!	
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Find goods and services	٩
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Shop Your favorites Your requests Your approvals	
	Click "Create a list Create a list
Enter list name	The lete
ou can search for items to add to this list	
14	

#### Your Favorites (con't)

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Search for selected items to add to Your Favorites or to the created list.

- Click selected item from the search results.
- Click Add to Favorites.
- > Add the selected to **Your Favorites** or to the created list.
  - If there is a created list, then click the check box to select the list.

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- If there is no list, then you can create a list. Follow the prompts.
- > Click **Add** to add the selected item.

Ariba Buying	laptop case	्र 🗘 🛪 👧
CASE, LAPTOP 15.6"		
Juage BOC Averiable Click or tap to zoom	CASE, LAPTOP 15.6" From General Stores Warehouse Laptop case to fit 15.6" laptop, with pockets for per accessions. (Each) \$12.33 USD / each Available in 1 day Quantity ples of: 1 Add to favorites	ns, business cards, and ? Click "Add to Favorites"
CAUSE Ariba Buying	laptop case	<u>्</u> र्य 🖓 ह्र 💀
CASE, LAP	· ·	

< CASE, LAP	Add this item to			
@ Click or t	Filter lists     Q       + Create new list       New Employee supplies kit   Add Cancel	•	and	(?



#### Your Favorites (con't)

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Confirm selected items are added to **Your Favorites** or to the created list.

- Click the **LAUSD** logo to return to the **Home** page.
- Click Your Favorites.
  - Click the created list where the selected items were added.
  - Add/delete selected items as needed in the list.

Once you've compiled your favorite items and/or created lists, this is the fastest way to place your order.

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			 				A
Shop Your favorites Your r	equests You	ir approvals					
					Cre	eate a l	ist ?
New Employee supplie	s kit 🖉					۳D	elete
CASE, LAPTOP 15.6"							
General Stores Warehouse \$12.33 USD							

#### Your Requests

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Your Requests will show all your Requisitions.

> Recent Requests tab shows updated Requisitions from the last 3 months.

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- > **Requisitions** tab shows all Requisitions regardless of status and/or age.
  - Use any fields to filter and search for Requisitions.
- > Purchase Orders tab shows all created Purchase Orders [PO].
  - Use any fields to filter and search for Purchase Orders.
- To Receive tab shows fulfilled Purchase Order [partial or full] which requires to be received.

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Find goods and services	٩	?
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Vour requests		
Recent requests Requisitions Purchase orders To receive	Request for quotes Custom forms Projects	Other requests
Recently updated within 3 months		?

### Your Approvals

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Any pending requests requiring your approval will be listed here.

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1	Find goods and services	<u> </u>				
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Shop Your favorites	Your r Your approvals					

#### **User Preferences**

Click the initials in the upper right-hand corner to access User Preferences.

- Click App settings.
  - Click Change your profile.
    - Update your profile accordingly to ensure your requisitions have the correct contact information.

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• Common information fields will populate on the requisition from your profile.

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FILL		-	REQUESTOR25	
		I View your profile	6위상 App settings	>
elle	Find goods and services		() Sign out	
北		A Change your profile		
£ /		👰 Manage your teams		?
Shop Your favorites Your requests	Your approvals	③ Change default locale		
		Delegate authority		
		Change email notification preferences	uest on behalf of	<u>8</u> 8
	TRANSPORT	Bu	uy with a team	88

#### User Preferences (con't)

Change your profile has five sections.

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- 1. Personal Information information captured from Single Sign-On [SSO].
- 2. Account/Ship update if you have preferred location and funding.
- 3. Justify Changes optional comments and attachments.
- 4. Approval Flow may be required.
- 5. Review Changes click Submit if entered data is correct. Preferences will update upon approval.

UNIFIED	Test	Site					
Personal Profile	UP102: User Profile Changes for Ma	x Rebo				Next Exit	t
Groups determine the tasks you perform and the data you work with. The other information is used as default values in many processes.							
1 Personal Info	Personal Profile Informa	tion - User Profile					
	Name: *	Max Rebo					
2 Account ship	Business Email Address: *	REQUESTOR24@lausd.net					
3 Justify Changes	Supervisor:	Jennie Ngo	$\sim$				
4 Approval Flow	Groups:	Internal User, Spot Buy User, Purchasing Purchasing User [select]	Agent,				
5 Review Changes	(*) indicates a required field You expressly agree and understa further described in the Ariba Priv	ind that your data entered into this system acy Statement. Privacy Disclosure for Aril	n may be trans ba Cloud Serv	sferred outside of the rice	European Union or o	ther jurisdiction where you are located	d, as
					Click Next.	Next Exit	t
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#### User Preferences (con't)

Click the initials in the upper right-hand corner to access User Preferences.

Click App settings.

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- Click Change Email Notification Preferences.
  - Update email preferences.
  - Click **Save**. Then, click **Yes** on the confirmation screen.

This allows which emails to be sent and how often based on your selection criteria.

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			(A) View your profile	♦ App settings (1) Sign out	>
	Find goods and services		A Change your profile		
			A Manage your teams		C
10p Your favorites Your requests You	r approvals	Click Change email	hange default locale		
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New			Change email notification preferences	equest on behalf of	8
Year End Cut Off	area Distribution, Regular Deliv	orioc: 6/14/2024 9:00pg	Sama Day	Buy with a team	ಕ್ಟಿನ
Deliveries: 6/14/2024 9:00am Overnig	ht Deliveries: 6/20204 12:00pm	Will-Call: 6/24/2024 5:00	00pm	Recent requests	
	Test Site				
Notification Method					
When I am an approver: Send individual email	ls 🗸 (i)				
When I am a watcher: Send individual email	ls 🗸 (i)				
Notification Frequency					
send email each time my document is approved:	0				
end email when my document is fully approved:	0				
When I need to approve a document: Ser	nd once	co and then keeps conding the	m as part of the daily consolidated		
Ser Sterade.		te and then keeps sending the	in as part of the daily consolidated		
When I am a watcher: Ser	nd once 🗸 🕕				
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When I am a watcher: Ser	nd once V		After going through all of the selections, click "Save".	Save	ancel

#### User Preferences (con't)

Click the initials in the upper right-hand corner to access User Preferences

Click App settings.

>>>

- Click Delegate Authority.
  - see End-User Training Guided Buying: How to Delegate Authority

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This allows the end-user to delegate approval authority to another end-user when unavailable to approve.

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in.		View your profile	¢۹۵ App settings	>
	Find goods and services	Change your profile		-
		A Manage your teams		?
Shop Your favorites Your requests Yo	If you are going to be out of the office or unable to approve documents in Ariba, you	S Change default locale		
	somone else. The details on how to delegate your approval authority are in a seperate	Delegate authority	2 - 10 10 10 10	
New	to Delegate Approval Authority - End User Training - Guided Buying."	Change email notification preferences	equest on behalf of	8
Year End Cut Off Year-end cutoff dates from General	Stores Distribution Regular Deliveries 6/14/2024 8	00pm Same Day	Juy with a team	ಕ್ಷಿಕ
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# **GUIDED BUYING**

# <u>Key Takeaways</u>







## End of Training Thank you!