

# **Erie Insurance Group Vendor Ariba User Guide**

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## 1 Ariba Ordering Methods

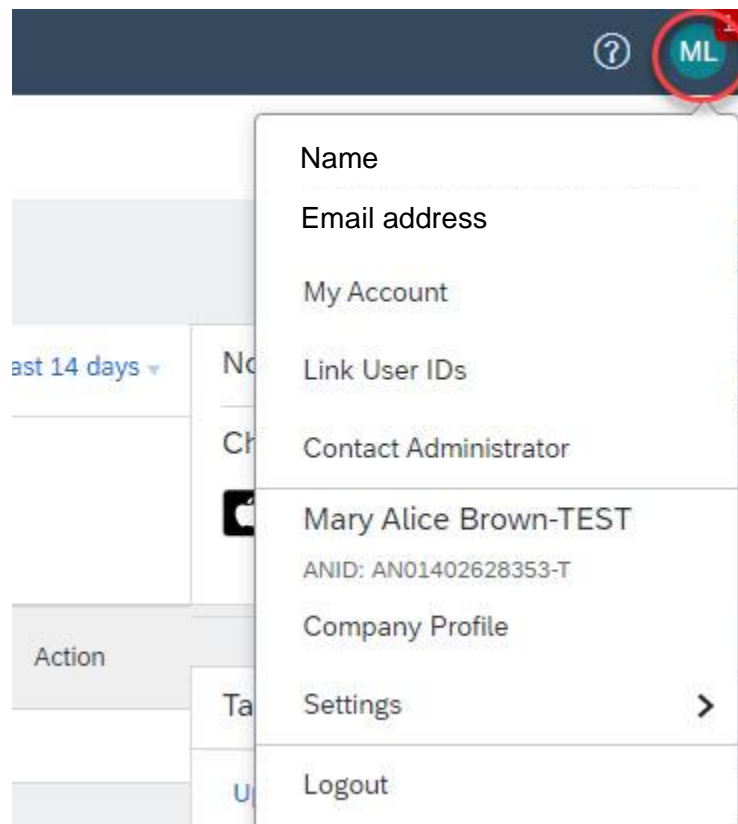
- Light/Standard Enabled (Email) – means the vendor uses Ariba to receive purchase orders (POs) and submit invoices. The free option has limited capabilities; such as vendors can not see their “inbox” of purchase orders but rather get sent purchase orders via email notifications only. Contracts are not visible until they begin creating a contract invoice in Ariba system.
- Full/Enterprise Enabled (Electronic Ordering) – means the vendor uses Ariba to receive purchase orders (POs) and submit invoices. The paid option allows the vendor see to their inbox of purchase orders, outbox of sent invoices, further Ariba support, and the account has much more functionality (reports, etc.). Contracts are still not visible until they begin creating a contract invoice in Ariba system.

## 2 Ariba Enterprise/Full Account Fee Structure

For information regarding cost of using the Ariba Network, please see following link:

[Ariba Network For Suppliers: Accounts and Pricing | SAP Ariba](#)

## 3 Ariba Network Identification Number (ANID)

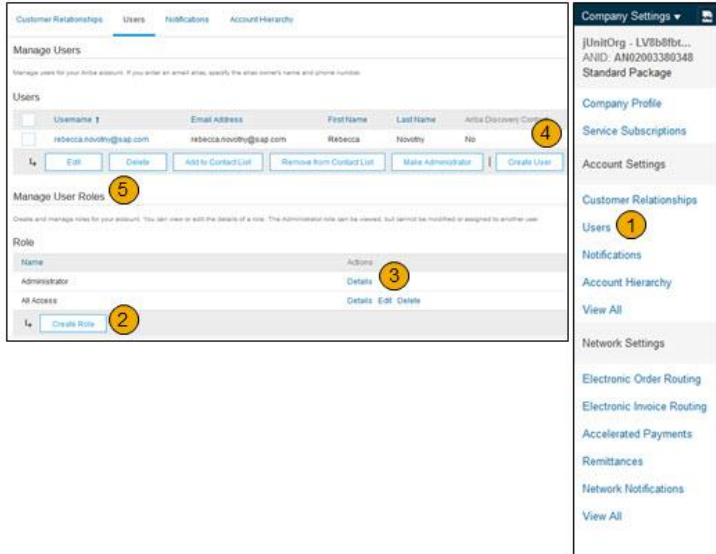


## 4 Adding Other Users

### Set Up User Accounts

#### Create Roles and Users (Administrator Only)

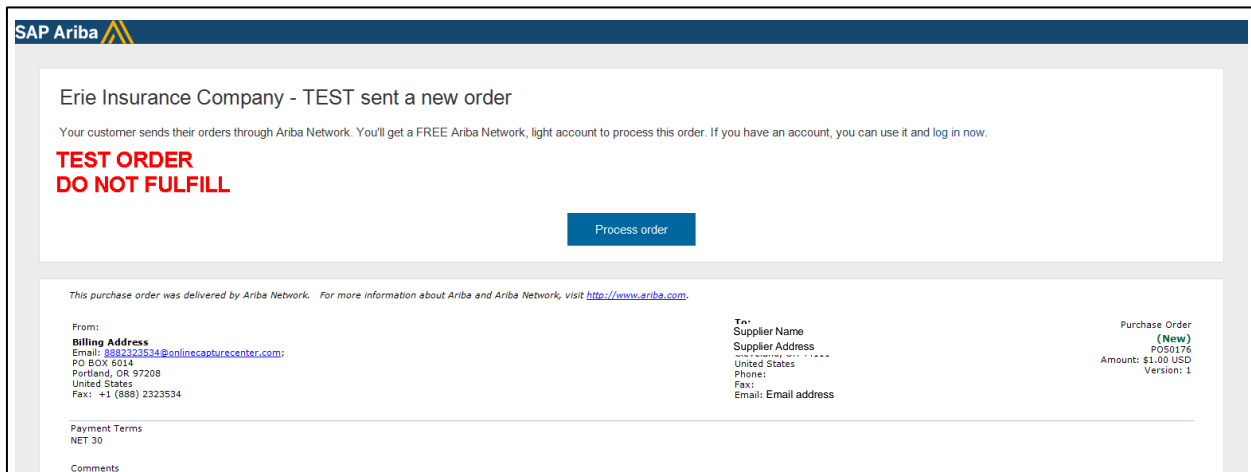
1. Click on the Users tab on the **Company Settings** menu. The Users page will load.
2. Click on the **Create Role** button in the Manage Roles section and type in the Name and a Description for the Role.
3. Add Permissions to the Role that correspond to the user's actual job responsibilities by checking the proper boxes and click save to create the role.
4. To Create a User Click on Create User button and add all relevant information about the user including name and contact info.
5. Select a role in the Role Assignment section and Click on Done.



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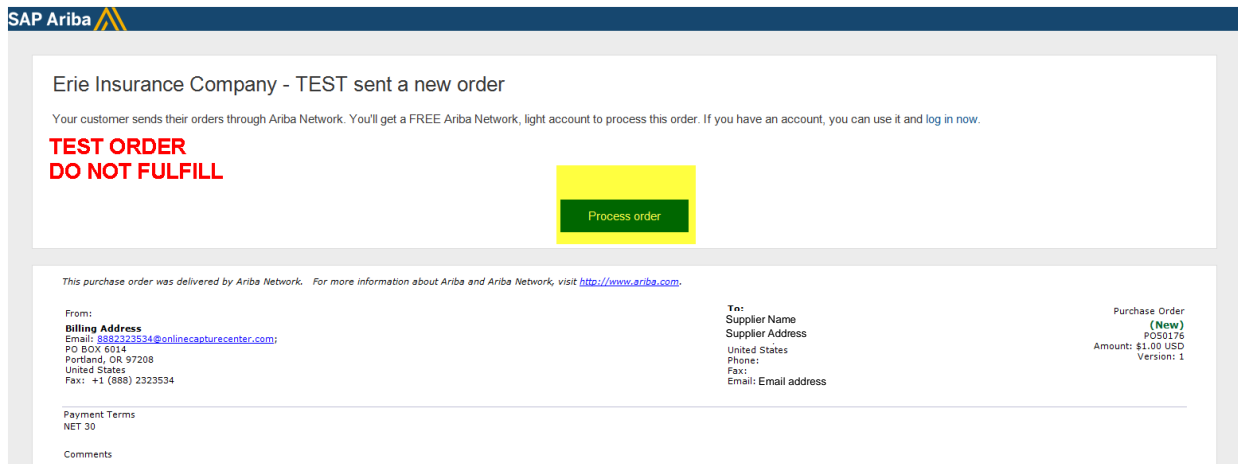
## 5 Accepting ERIE's Relationship Request – Test PO Process for Light/Standard Account

1. SVM sends a \$1 PO to supplier to trigger the creation of their Ariba account.

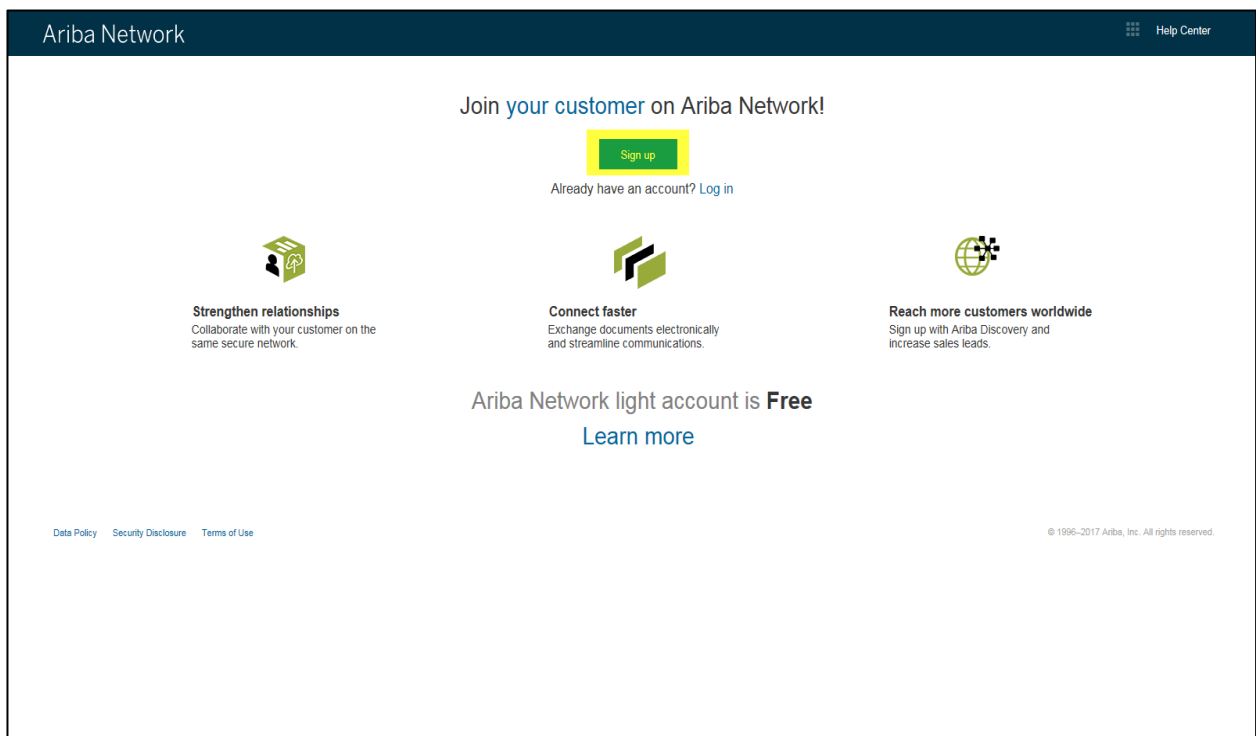


2. Supplier views the email and following the links and instructions creates their Light account.

- The supplier will first receive the following test PO in their email, and then will click “**Process Order**”



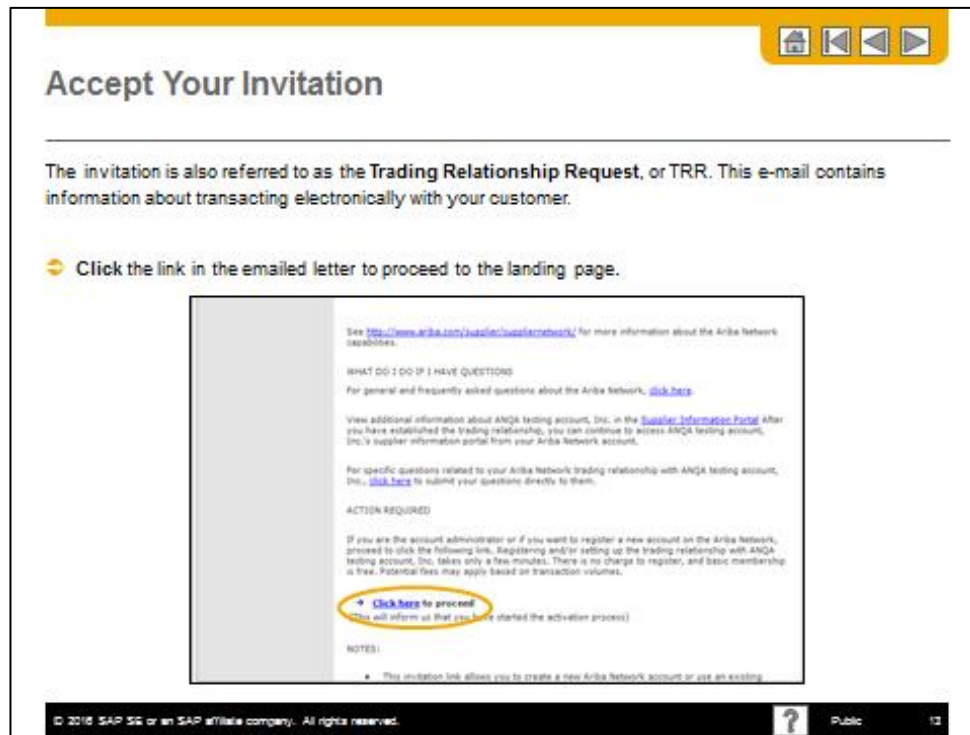
- The supplier will click “Sign up” to begin the registration process or “Log in” if there is an existing account.



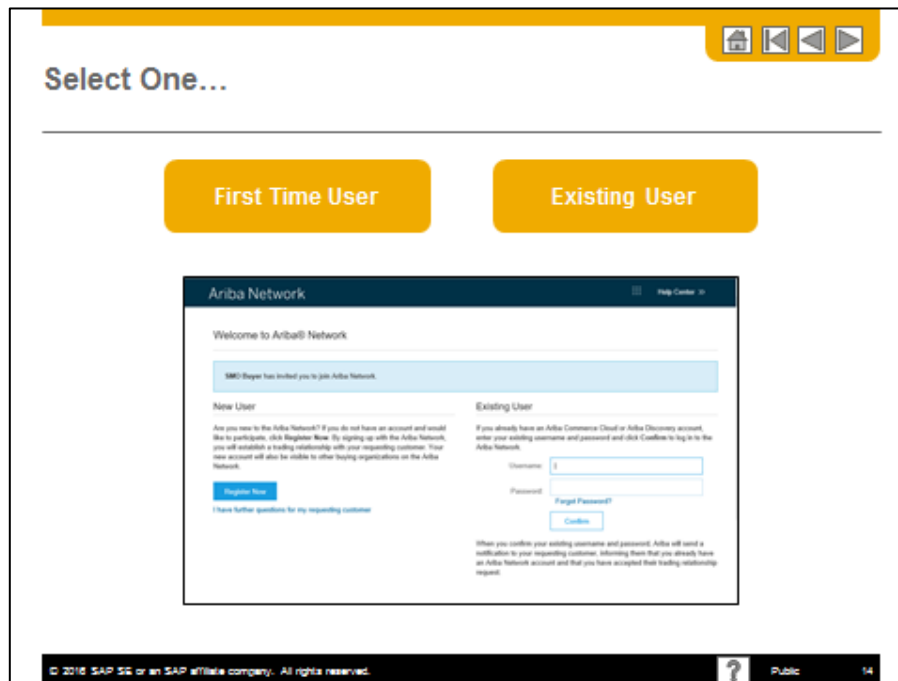
- [illegible]

## 6 Accepting ERIE's Relationship Request – TRR Process for Full/Enterprise Account

- Supplier must accept TRR by clicking "**Click here to proceed**" which will be delivered from Ariba via email.



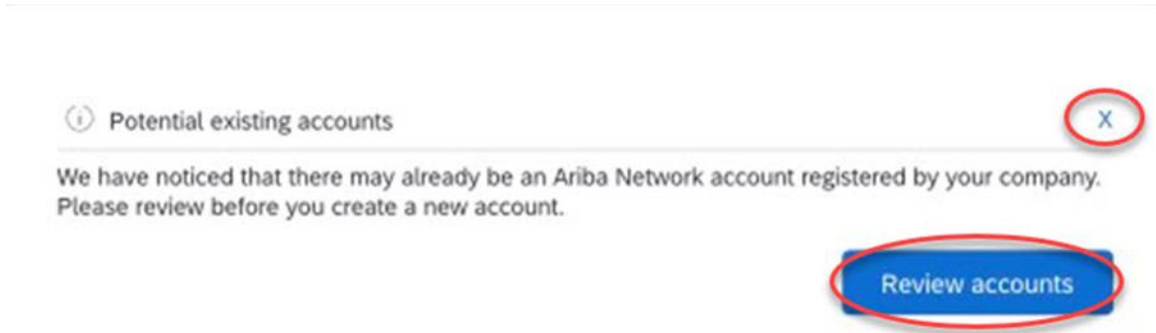
- Supplier must either register as a new user or log in with an existing account to complete the connection.



- Sourcing and vendor management analyst should provide Remittance ID to be configured.

## 7 Ariba Set Up Issue – Potential Account Identified

1. If you are getting a pop up window saying “Potential Existing Accounts” there are two ways to move past it depending on if you already have an account or if you are creating a new account.
  - a) Already Have an Account? – click on the “X” in the corner of the window then you should be able to login.
  - b) Creating A New Account? – click on the “Review accounts” button.



2. If you still need to create the new account after reviewing the existing accounts, click “Continue Account Creation” to set it up.

### Review duplicate Account

We noticed that your company may already register an Ariba Network account, please review the match results below, then:

- You can log in the account you are associated with
- Or, you can view the profile and contact the account administrator from there
- Or, if there is no match, you can [Continue Account Creation](#) and we will progress your registration
- Or, you can [Go back to previous page](#)

Match Based On				
COMPANY NAME	E-MAIL ADDRESS	DUNS NO.	TAX ID	ADDRESS
Erie Insurance	Email address			100 Erie Insurance Pl Erie PA, United States 16530

20 search results found | [Search More](#)

SUPPLIER NAME	COUNTRY	STATE	DUNS	SUPPLIER AND	ACTIONS
ERIE TEST	USA	PA	-	AN01058892470	...

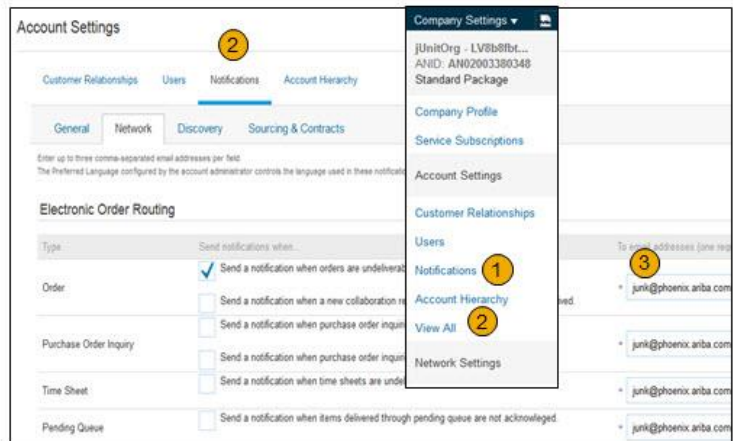


## 8 Configuring Email Notifications – Light/Standard Account

### Configure Your Email Notifications

The Network Notifications section indicates which system notifications you would like to receive and allows you to designate which email addresses you would like to send them to.

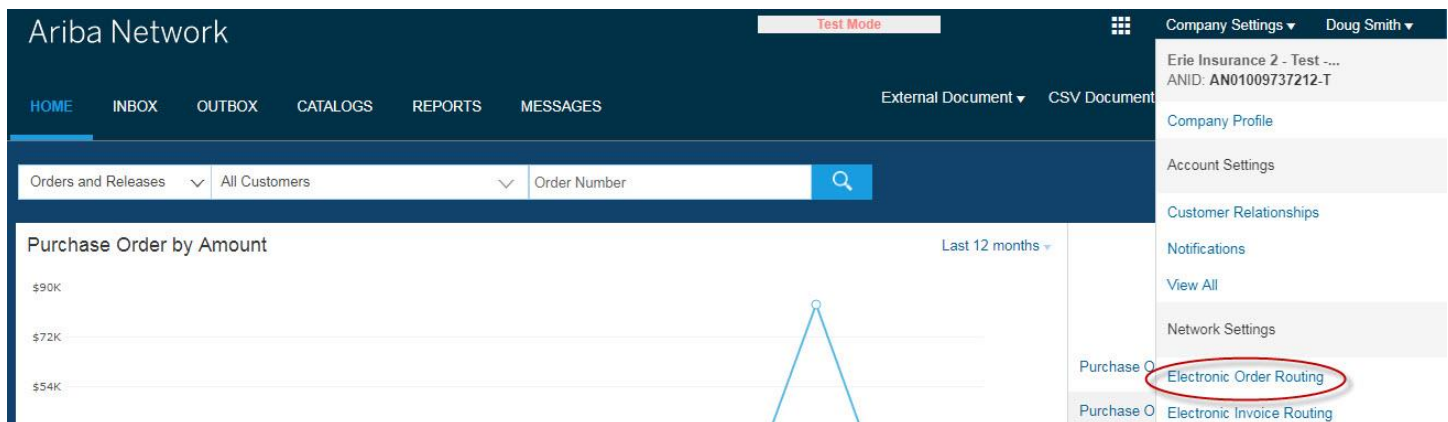
1. Click on Notifications under Company Settings.
2. **Network Notifications** can be accessed from here as well, or you may switch to the Network tab when in Notifications.
3. You can enter up to 3 email addresses per notification type. You must separate each address with a comma but include NO spaces between the emails.



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## 9 Configuring PO Notifications – Full/Enterprise Account

1. Click “Company Settings” in the top right corner then click “Electronic Order Routing.”



- The default routing method for orders is “Online,” click on that box and change it to “Email.”

#### New Orders

Document Type	Routing Method	Options
Catalog Orders without Attachments	Online	Save in my online inbox
Catalog Orders with Attachments	Online cXML <b>Email</b> EDI cXML Pending Queue Fax	without attachments Current Routing method for new orders: Online
Non-Catalog Orders without Attachments ⓘ		without attachments Current Routing method for new orders: Online
Non-Catalog Orders with Attachments ⓘ		without attachments Current Routing method for new orders: Online

- Add the email address that you would like the purchase orders to go to. You can separate multiple email addresses by commas.

#### New Orders

Document Type	Routing Method	Options
		Email address: <input type="text"/> ⓘ
Catalog Orders without Attachments	Email	<input checked="" type="checkbox"/> Attach cXML document in the email message <input checked="" type="checkbox"/> Include document in the email message <input type="checkbox"/> Leave attachments online and do not include them with email message. This applies to all orders with attachments that have the routing method “Same as new catalog orders without attachments”. <input checked="" type="checkbox"/> Attach PDF document in the email message
Catalog Orders with Attachments	Same as new catalog orders without attachments	Current Routing method for new orders: Email ⚠ Attachments will be included in the order.
Non-Catalog Orders without Attachments ⓘ	Same as new catalog orders without attachments	Current Routing method for new orders: Email
Non-Catalog Orders with Attachments ⓘ	Same as new catalog orders without attachments	Current Routing method for new orders: Email ⚠ Attachments will be included in the order.

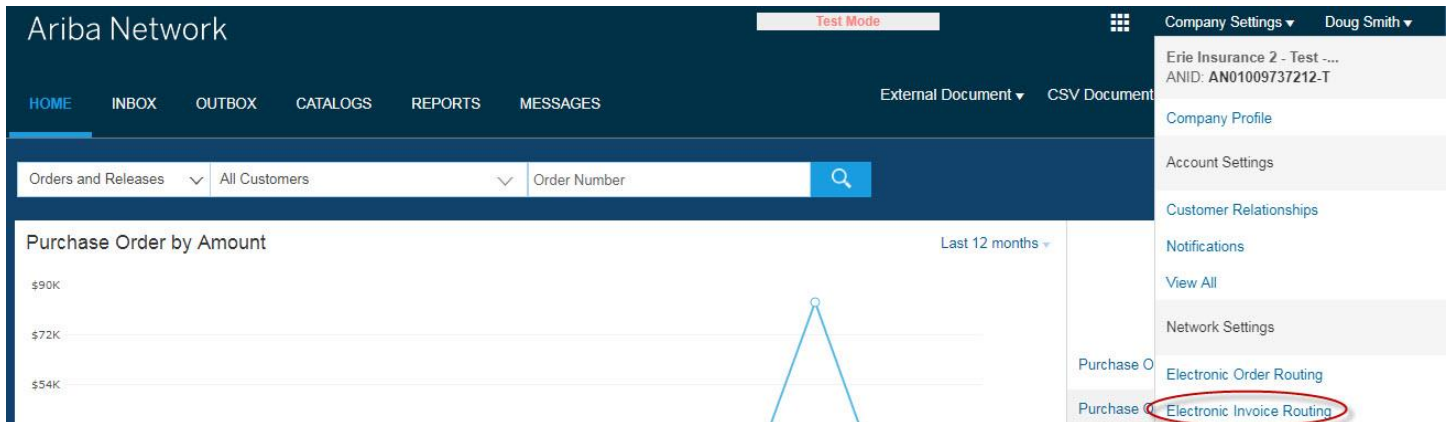
Notice the options for PDF and other documents in the email message. Notice the default routing method for all orders and change orders now shows “Email.”

- Click “Save” in the top right or bottom right corner.



## 10 Configuring Invoice Notifications – Full/Enterprise Account

1. Click “Company Settings” in the top right corner then click “Electronic Invoice Routing.”



The screenshot shows the Ariba Network dashboard. In the top right corner, the 'Company Settings' dropdown menu is open, displaying various settings options. The 'Electronic Invoice Routing' option is highlighted with a red circle. The dashboard also shows a 'Purchase Order by Amount' chart and a search bar.

2. Under “Notifications” check the box next to “Invoice Status Change.” Your email address will default in the box to the right but other email addresses can be added separated by commas.

### Sending Method

Document Type	Routing Method	Options
Invoices	Online <input type="button" value="v"/>	Return to this site to create invoices
Customer Invoices	Online <input type="button" value="v"/>	Save in my online inbox

### Notifications

Type	Send notifications when...	To email addresses (one required)
Invoice Failure	<input checked="" type="checkbox"/> Send a notification when invoices are undeliverable or rejected.	* noreplyaribacs@ariba.com
Invoice Status Change	<input checked="" type="checkbox"/> Send a notification when invoice statuses change.	* noreplyaribacs@ariba.com, Email address

3. Click “Save” in the top right or bottom right corner.



## 11 Attaching an Invoice – Contract

INV43837

Save

Submit

Invoice Entry

Header Information ▲

Supplier: \* Mary Alice Brown

Payment Terms: (no value) [ select ]

## 12 Attaching an Invoice – Purchase Order (PO)

1. If you have a light or standard account - click “process order” from the PO email received, then click Create a Standard Invoice. If you have a full or enterprise account - you can go into the “Inbox” then click on the PO number then click Create a Standard Invoice.
2. On the right side of the page, click the arrow next to “Add to Header” to drop down the options. Then click on “attachment.”

\* Indicates required field

Add to Header ▼

Tax

Shipping Cost

Shipping Tax

Shipping Documents

Special Handling

Special Handling Tax

Discount

Additional Reference Documents and Dates

Comment

Attachment

3. Scroll down to the bottom of the page and there will be an added section for attachments.

### Attachments

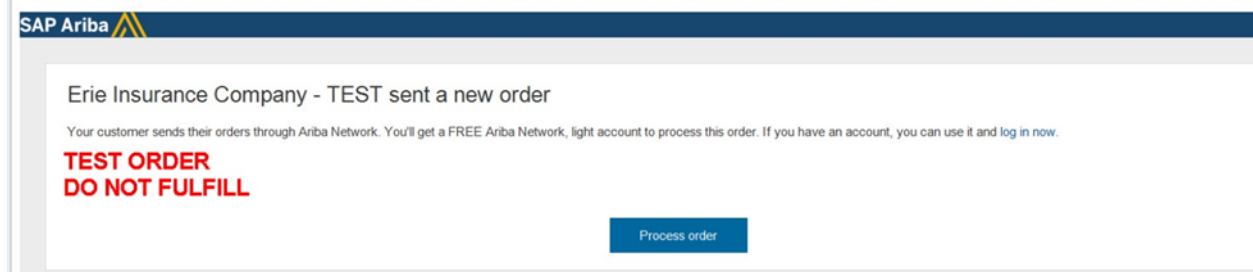
The total size of all attachments cannot exceed 10MB

Browse...

Add Attachment

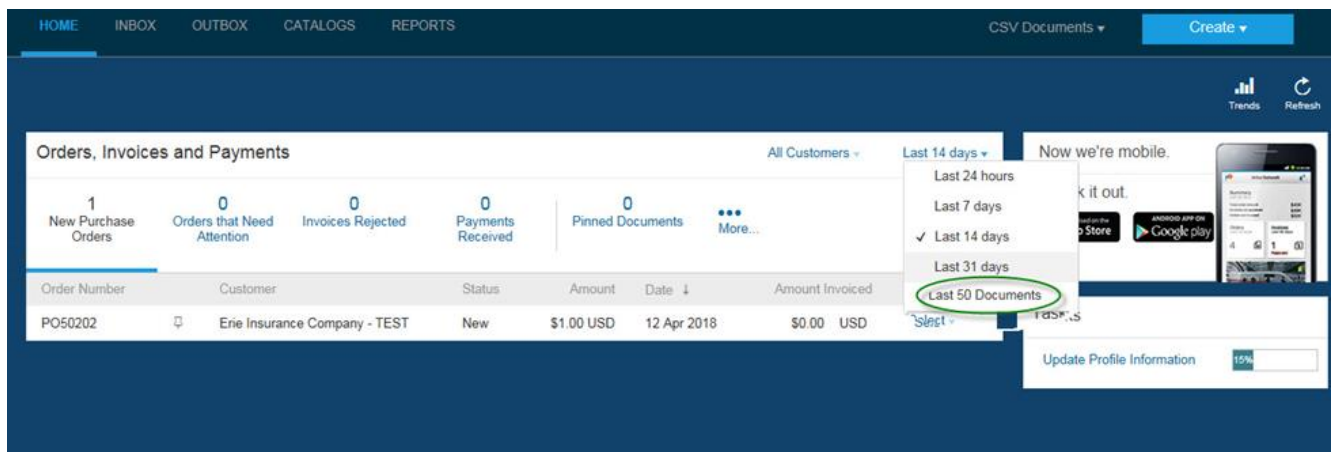
### 13 Purchase Order (PO) Invoicing – Light/Standard Account

1. Please ensure you have already followed the Test PO Link to set up your account.
2. Step 2: Locate your email from when the purchase order, not the test PO, was sent. Then, click on “Process Order” from the email.

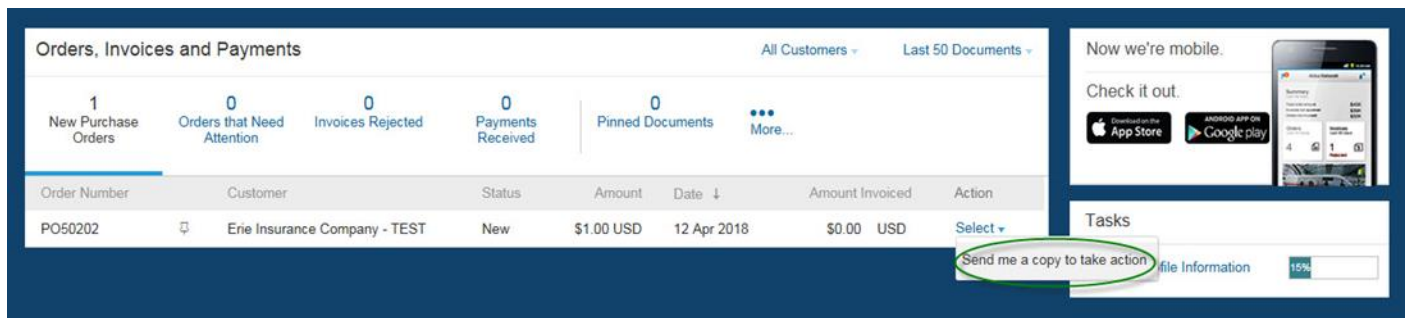


\*\*\*These next few steps should only be followed if you can not locate the PO email\*\*\*

Make sure all the purchase orders are showing to ensure you invoice against the right one by changing the filter that says “Last 14 Days.”



\*\*\*Click on “send me a copy to take action” then proceed from step 2.\*\*\*



- Once the link “process order” is clicked, you will be redirected to the PO on Ariba where you can create an order confirmation, ship notice, or standard invoice.

Purchase Order: PO50202

Done



**TEST ORDER  
DO NOT FULFILL**

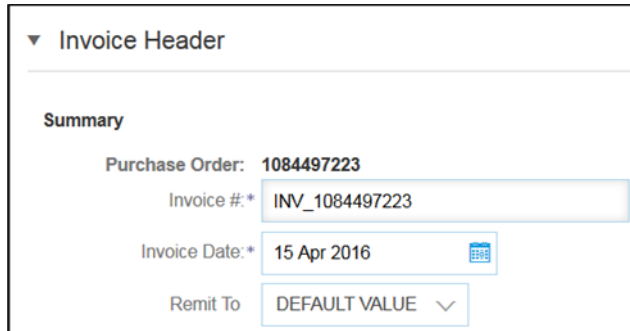
**From:**  
**Billing Address**  
 Email: 8882323534@onlinecapturecenter.com;  
 PO BOX 6014  
 Portland, OR 97208  
 United States  
 Fax: 41 (888) 7272534

**To:**  
**Mary Alice Brown-TEST**  
 Address  
 Erie, PA 16504  
 United States  
 Phone:  
 Fax:

**Purchase Order**  
 (New)  
**PO50202**  
 Amount: \$1.00 USD  
 Version: 1

Invoice is automatically pre-populated with the PO data. **Complete all fields marked with an asterisk and add tax as applicable.**

- Enter an Invoice # which is *your unique number* for invoice identification. The Invoice Date will auto-populate.



▼ Invoice Header

**Summary**

Purchase Order: 1084497223

Invoice #: \* INV\_1084497223

Invoice Date: \* 15 Apr 2016

Remit To: DEFAULT VALUE ▼

- Select Remit-To address from the drop down box if you have entered more than one.
- Tax and Shipping can be entered at either the Header or Line level by selecting the appropriate button. If there is no tax, please enter “0” in the Tax Rate (%) box.



**Tax** ⓘ

☒ Header level tax ⓘ
 ☐ Line level tax ⓘ

Category: \* **Sales Tax** ▼

Location:

Description:

Regime:

Taxable Amount: **\$44.00 USD**

Tax Rate Type:

Rate(%): **6**

Tax Amount: **\$2.64 USD**

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**Shipping**

☒ Header level shipping ⓘ
 ☐ Line level shipping ⓘ

Ship From: **Mary Alice Brown-TEST**

Erie, PA  
United States

Ship To: **Receiving**

Erie, PA  
United States  
Contact Name  
Receiving

Deliver To: **Receiving**

---

**Shipping Cost**

Shipping Amount: **\$8.00 USD**

Shipping Date:

7. You can also add some additional information by clicking “Add to Header” such as: Special Handling, Shipping Cost, Comment, Attachment, or Shipping Documents. Optionally, here you can attach the file of the paper invoice using “attachment.”

\* Indicates required field

**Add to Header** ▼

- Tax
- Shipping Cost
- Shipping Tax
- Shipping Documents
- Special Handling
- Special Handling Tax
- Allowance
- Charge
- Additional Reference Documents and Dates
- Comment
- Attachment

8. Scroll down to the Line items section to select the line items being invoiced. Review or update Quantity for each line item you are invoicing.

Quantity	Unit	Unit Price
<input type="text" value="10"/>	<input type="text" value="BX"/>	<input type="text" value="25.00 EUR"/>

9. If line item should not be invoiced, click on the line item’s Green slider to exclude it from the invoice, OR click the check box on the left of the item and click “delete” to remove the line item from the invoice. You can generate another invoice later to bill for that item.

No.	Include	Type	Part #
<input type="checkbox"/> 2	<input checked="" type="checkbox"/>	MATERIAL	GOODS_02

**Pricing Details**
Price Unit: \* BX  
Unit Conversion: \* 1

Line Item Actions ▼
Delete

No.	Include	Type	Part #
<input checked="" type="checkbox"/> 2	<input checked="" type="checkbox"/>	MATERIAL	GOODS_02

10. Click the “next” button in the bottom right corner and review the information you have entered on the following page. Click “submit” when everything looks correct.

## 14 Purchase Order (PO) Invoicing – Full/Enterprise Account

### Invoice via PO Flip

To create a PO-Flip invoice (or an invoice derived from a PO that you received via Ariba Network):

- From the home screen within your Ariba Network account, select the **Create** dropdown menu and select **PO Invoice**.
- For PO Invoice select a **PO number**.
- Click on the **Create Invoice** button and then choose **Standard Invoice**.
- Invoice is automatically pre-populated with the PO data. **Complete all fields marked with an asterisk and add tax as applicable**. Review your invoice for accuracy on the **Review** page. If no changes are needed, click **Submit** to send the invoice to Erie Insurance Group.

CSV Documents ▼
Create ▼

PO Invoice 1
Non-PO Invoice

Orders and Releases
Time & Expense Sheets
Early Payments
Scheduled Payments

Orders and Releases
Items to Ship

Search Filters

Orders and Releases (2)

Type	Order Number	Customer	Invoicing	Ship To
Order	20151016_KPBP01	Ariba, Inc. - TEST		SandBox Buyer Profile
Order	20150415_PO1	Ariba, Inc. - TEST		SandBox Buyer Profile

Create Order Confirmation ▼
Create Ship Notice
Create Invoice ▼

Orders and Releases (2)

Type	Order Number	Customer	Invoicing	Ship To Address
Order	20151016_KPBP01	Ariba, Inc. - TEST		SandBox Buyer Profile
Order	20150415_PO1	Ariba, Inc. - TEST		SandBox Buyer Profile

Create Order Confirmation ▼
Create Ship Notice
Create Invoice ▼

Standard Invoice
Credit Memo
Link Item Credit Memo

Create Invoice

Please correct the following errors and resubmit

Invoice Header

Summary

Purchase Order:	20150415_PO1
Invoice #	
Invoice Date	17 Apr 2016
Bill To	Ariba_TestSupplier - TEST