

ARIBA Best Practices

The following guidance is intended for staff directly entering transactions in Ariba modules. A standardization of title naming, attachment placement and correct account coding will streamline the process for transactions requiring Finance Team approval.

Title Naming Conventions: *For each transaction type, please follow the conventions below. Information that is needed for each group's internal purposes can be added at the end of each title.*

- Travel – Budget #, Traveler Last Name, City, Conference Acronym, Date Range of Travel
 - Example: (63-5511, Smith, San Diego, APA, 5/5 – 5/12/17)
- E-Procurement – Budget #, Vendor Name, Brief Description, Site/Group
 - Example (63-5511, Office Depot, Copy Paper, Eastlake)
- E-Reimbursements – Budget #, Last Name, Brief Description
 - Example (63-5511, Smith, XYZ Conference Registration)
- P2I – Budget #, Last Name, Brief Description
 - Example (63-5511, Smith, XYZ Conference Registration)
- Non-PO Invoices – Budget #, Vendor, Invoice#, Invoice Date
 - Example: (63-5511, Valant, PSY0001, March 2017)
- Contracts/BPO's – Budget #, Vendor, Brief Description, Invoice Date
 - Example: (63-5511, Valant, Consulting, March 2017)

Attachments

- All attachments should be uploaded to the summary screen in each module rather than embedded in each individual line item
- It is helpful to minimize the number of attachments per transaction. Making one comprehensive PDF of all requirements (in the order of the line items) would be ideal. It is OK to add in one or two supplemental PDFs especially when additional information is requested after the main PDF is complete.

Object Codes

- Taxability List: <https://f2.washington.edu/fm/tax/netid/taxability>
- Object Code List: <http://f2.washington.edu/fm/fr/references/object-codes>

Common Goods Ordering: All common goods orders require use of the Department project code: PSYCGD and the appropriate site task code:

- Eastlake, 378
- UWMC, 001
- HMC, 008
- Bernier, 303
- SMART, 424
- CSHRB, 066