



SAP Ariba Central Approval Process: Tax Manager

Overview: This tutorial provides system guidance to users with the Tax Manager role for processing documents in SAP Ariba, but does not indicate appropriate or required assessments.

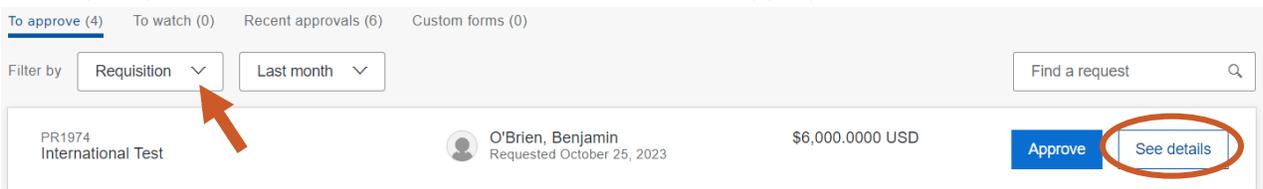
Action taken on the purchase requisition (PR) will determine which invoice reconciliation (IR) documents route to the Tax Manager for approval. Tax Managers will receive the purchase requisition (PR) after Procurement has processed it. Once the Tax Manager approves, the document will route back to Procurement for final approval.

Processing purchase requisitions (PRs)

1. Log in to [SAP Ariba Guided Buying](#).
2. Select the **Your approvals** tab.



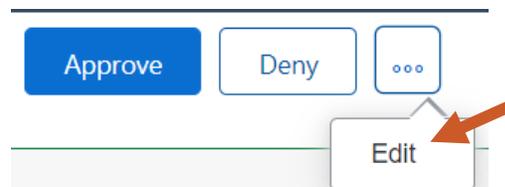
3. Filter by **Requisition**, and select the **See details** button on the appropriate PR.



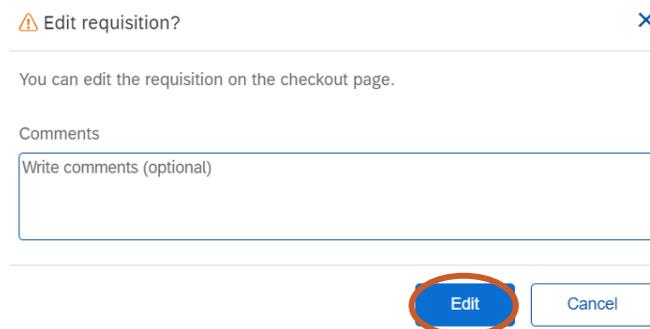
4. In the upper right corner, select the "..." menu next to the Approve and Deny buttons.



5. Select **Edit**.



6. You will be prompted to add optional comments. Click the **Edit** button to proceed to the PR.





- 7. Expand the line item(s) using the arrow on the left-hand side to view line item descriptions, the supplier, and the supplier purchase order address.
 - a. **Note:** There is only one supplier on non-catalog PRs.

Items (1)

| Quantity | Price | Net Amount |
|-----------------------|-----------|--------------------------------|
| - 3 + | 2,000 USD | \$6,000.0000 USD |
| Unit of Measure: each | | Gross Amount: \$6,000.0000 USD |

International Test
International Test Supplier

Name: International Test
Supplier: International Test Supplier

Description: International Tax Test

Contact: International Test Supplier
123 Main Street Toronto, Ontario M3C 0E4 Canada

Supplier Part Number:
Supplier Part Auxiliary ID:

- 8. Determine the **Income Class Code** and select the corresponding option in the header level information (above the line items).
 - a. If the Income Class Code is **Royalties** or **Independent Contractor** and a change to the PR is necessary (e.g., withholding or gross up), add the amount needed for tax withholding or gross up to the comments. Procurement will follow the directions in the comments to amend the PR.

Comments

Write your comment...

Share with supplier

- b. **Note:** Selecting an Income Class Code of **Royalties** or **Independent Contractor** on the PR will route the IR to the Tax Manager for approval. If **Non Reportable** is selected, the IR will not route to the Tax Manager.

Income Class Code

Non Reportable

Clear selection

No Choice

Royalties

Independent Contractor

Non Reportable



9. Review and respond to the Tax Manager question.

- a. **Note:** Due to your role as the MSU Tax Manager, this question always appears on your requisitions, even if you are submitting a PR, approving as a fiscal officer, or reviewing as an ad hoc approver. You must always answer the question.

As the MSU Tax Manager, I do not have authority to make changes to this requisition outside of selecting an appropriate Income Class Code. By clicking yes, I acknowledge and agree that I did not make changes to this requisition to which I am not authorized.

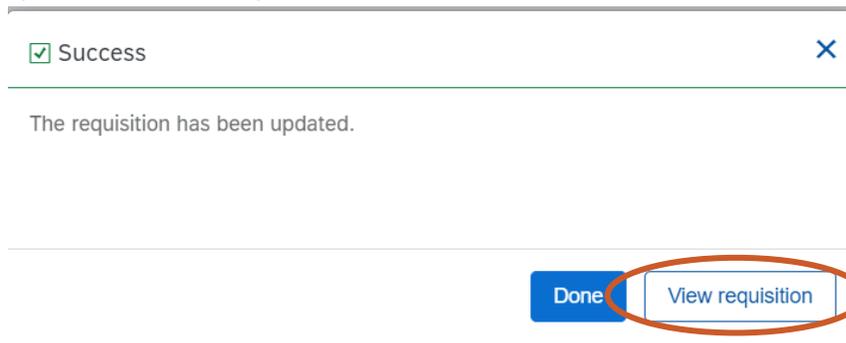
Yes No

 Please answer the MSU Tax Manager question.

10. Once appropriate updates are made, select the **Update request** button in the upper right-hand corner.



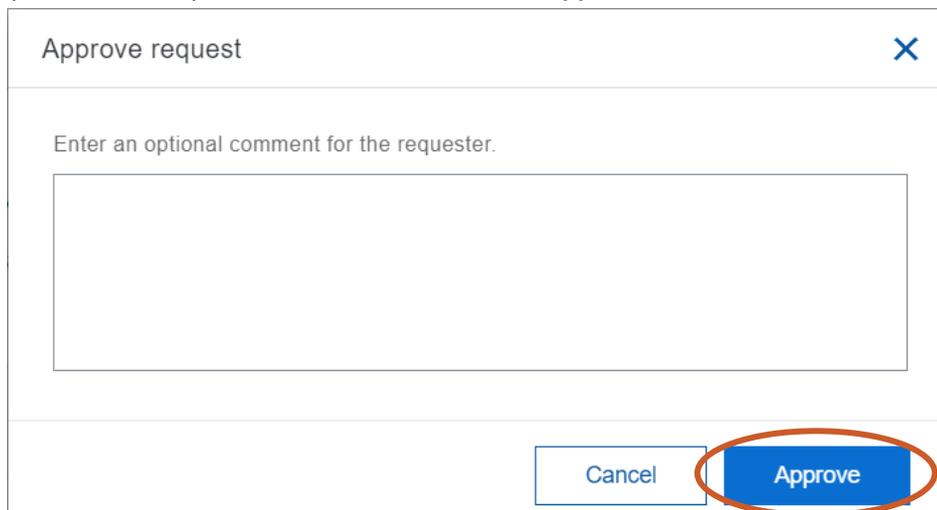
11. In the resulting pop-up, click the **View requisition** button.



12. Select the **Approve** button in the upper right-hand corner to continue the routing of the PR.



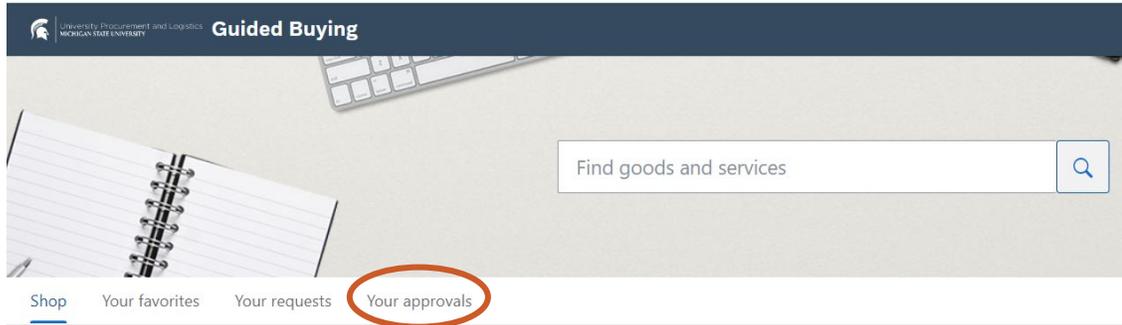
13. You will be prompted to enter optional comments. Select the **Approve** button.





Processing invoice reconciliations (IRs)

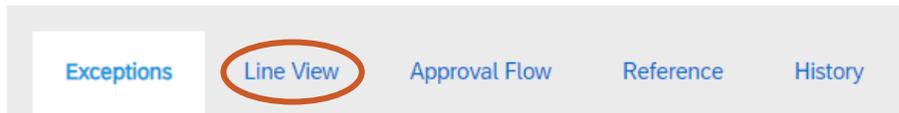
1. Log in to [SAP Ariba Guided Buying](#).
2. Select the **Your approvals** tab.



3. Filter by **Invoice**, and select the **See details** button on the appropriate IR.
 - a. **Note:** Only IRs where an Income Class Code of **Royalties** or **Independent Contractor** was selected on the PR will route to the Tax Manager. If **Non Reportable** was selected, the IR will not route to the Tax Manager.

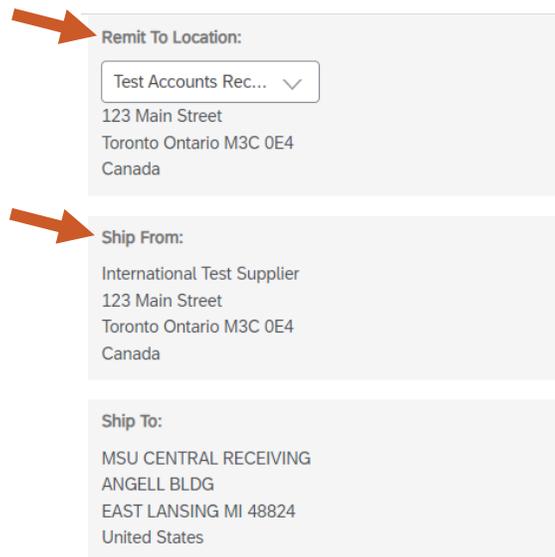


4. The IR will open on the **Exceptions** tab. Click on the **Line View** tab.



IRTESTPO886-1011

5. The right-hand side of the **Header Information** section displays the supplier's **Remit To** and **Ship From** locations.





6. On the left-hand side of the **Header Information** section, answer these questions:
 - a. **Treaty Exempt:** Select yes or no
 - b. **Gross Up Payment:** Select yes or no
 - c. **Amount Paid to Supplier:** This field is optional. If the amount to be paid is **not** the same as the total amount reflected in the upper right-hand corner, enter the appropriate amount in USD. Otherwise, Accounts Payable assumes the amount in the upper right-hand corner is correct.
 - d. **Federal Tax Withholding Amount:** Enter a dollar amount in USD, up to two decimal places.
 - e. **State Tax Withholding Amount:** Enter a dollar amount in USD, up to two decimal places.
 - f. **Country Code:** Select the appropriate country code of the supplier.

Header Information

Supplier: [International Test Supplier](#)

On Behalf Of:

Supplier Contact: [International Test Supplier \[select \]](#)

Pay Via: Default

Supplier Invoice #: TESTP0886

Invoice Submission Method: Paper Invoice

Invoice Origin: Supplier

Payment Terms: [Net 30 Days](#)

Treaty Exempt: Yes No

Gross Up Payment: Yes No

Amount Paid to Supplier:

Income Class Code:

Federal Tax Withholding Amount:

State Tax Withholding Amount:

Country Code:

Payment Type:

My Labels: [Apply Label...](#) ⓘ

7. Once all fields have been completed, select the **Approve** button at the top of the page.

8. Enter optional comments as necessary. Select the **Submit** button.

Comments

Comments:

Visible to Supplier

9. The document will route back to Procurement for final approval.