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Purchasing Unit Administration Guide

SAP Ariba Buying and Invoicing

SAP Ariba Buying

SAP Ariba Invoice Management

SAP Ariba Contract Invoicing

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Purchasing Unit Administration Guide

This guide is for SAP Ariba administrators responsible for setting up purchasing units in SAP Ariba Procurement solutions.

A purchasing unit (also called procurement unit) is an SAP Ariba concept that lets you separate spend activities by entities such as departments, business units, purchasing organizations, and cost centers.

This guide applies to:

- SAP Ariba Buying
- SAP Ariba Buying and Invoicing
- SAP Ariba Invoice Management
- SAP Ariba Contract Invoicing

Related Guides

[Common Data Import and Administration for SAP Ariba Procurement Solutions](#)

Purchasing Unit Concepts

A purchasing unit (sometimes called procurement unit) is an SAP Ariba concept that lets you separate spend activities by entities such as departments, business units, purchasing organizations, and cost centers.

Note

- Purchasing units are equivalent to company codes and not an additional hierarchical level. In SAP Ariba, purchasing units are mapped to company codes for SAP variants and SiteIDs to PeopleSoft variants.
- By default, the Purchasing Unit field is not editable in the requisition. However, it can be editable through customisation.

[Factors Determining Available Purchasing Unit Features \[page 5\]](#)

[Purchasing Unit Concepts and Features \[page 6\]](#)

[Purchasing Unit Hierarchy \[page 7\]](#)

[Association of Data to Purchasing Units \[page 8\]](#)

[Visibility Control Feature \[page 8\]](#)

Factors Determining Available Purchasing Unit Features

Several factors determine which purchasing unit features are available in your system.

Factors include:

- Whether your site is configured as a Generic, PeopleSoft, or SAP variant
- Whether users are mapped to purchasing units (see [Assigning Users to the Purchasing Units They Belong To \[page 10\]](#))
- Whether you assign users to be responsible for purchasing units based on group membership (see [Making Users Responsible for Multiple Purchasing Units \[page 11\]](#))
- Whether the visibility control feature is enabled (see [About the Visibility Control Feature \[page 8\]](#))
- Which data in the system is mapped to purchasing units (suppliers, cost centers, and so on)

For details about the many features of purchasing units and the requirements of each feature, see [Functionality and Requirements Reference \[page 41\]](#)

Purchasing Unit Concepts and Features

A purchasing unit (also called procurement unit) is an SAP Ariba concept that lets you separate spend activities by entities such as departments, business units, purchasing organizations, cost centers, divisions, and so on.

Purchasing Unit Concepts

You can make the purchasing unit object specific to the SAP Ariba solution, or you can map purchasing units to objects defined in your Enterprise Resource Planning (ERP) system. For example, in an SAP Ariba system configured as a PeopleSoft variant, purchasing units can represent PeopleSoft business units.

Purchasing Unit Features

The availability of purchasing unit features depends on your implementation. Your site might not include all the features listed in this section.

For more information, see [Factors Determining Available Purchasing Unit Features \[page 5\]](#).

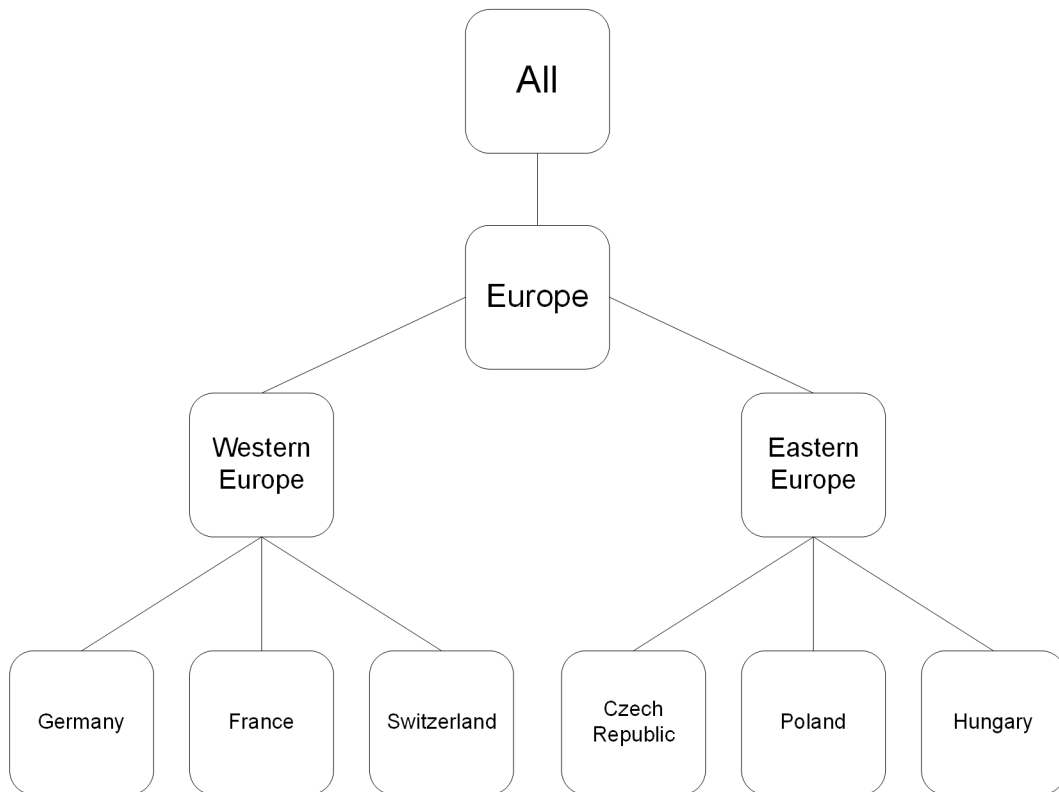
Depending on your implementation, purchasing units offer the following features:

- Approvable documents (approvables) have a purchasing unit assigned to them. This is often the purchasing unit of the requester. For example, when a user from PU_111 submits a purchase requisition, the purchasing unit field on the requisition displays PU_111. (For information on how the SAP Ariba solution determines which purchasing unit to assign to an approvable, see [Defaulting Behavior of Purchasing Unit Fields \[page 46\]](#)).
- Purchasing unit filtering in the user interface places constraints on choosers in approvables. For example, when users create requisitions, the Supplier choosers include only the suppliers mapped to the users' purchasing units and parent purchasing units (see [Purchasing Unit Hierarchy \[page 7\]](#)).
- As the approvable goes through the approval flow, approval requests are sent only to approvers relevant for that purchasing unit.
- When users perform searches, run reports, or perform manage operations (such as **► Manage ► Contracts ►** or **► Manage ► Invoice Reconciliations ►**), the data they see is restricted to specific purchasing units.
- Purchasing unit filtering for contracts supports selection of the best contract terms during requisitioning or invoicing within a business hierarchy and enhanced selection of parent agreements during sub agreement creation.
- You can import receiving tolerances specific to purchasing units.
- For purchase orders, you can have SAP Ariba Customer Support configure branding specific to purchasing units.

Purchasing Unit Hierarchy

Purchasing units are hierarchical. The **All** purchasing unit is the parent of all purchasing units, even if it is not explicitly specified in your CSV files. It is automatically generated as the parent when you import purchasing unit data.

The following figure shows an example of a purchasing unit hierarchy. Each square represents a purchasing unit.



There is no limit to the number of levels in the purchasing unit hierarchy. However, reporting is limited to the top five levels, including the **All** purchasing unit.

Depending on how you implement purchasing units in your system, the purchasing unit hierarchy can affect which data a given user can see. Depending on the type of data being viewed, users can see data up the hierarchy, down the hierarchy, or both up and down. For more information, see [Filtering in Search Results, Manage Operations, and Reports \[page 25\]](#).

The purchasing unit hierarchy does not affect which approvables a user can take action on (for example, approve or deny). Users can act on approvables from the purchasing units they are responsible for. For more information, see [Associating Users with Purchasing Units \[page 5\]](#).

Note

If you plan to create more than one level of purchasing units beneath the top level (**All**), you need to be familiar with all information relating to purchasing units. Some aspects of the purchasing unit hierarchy (for example, the effects of the visibility control feature) can be difficult to understand.

Figure 1: Purchasing Unit Hierarchy

Association of Data to Purchasing Units

You can map various types of data (for example, suppliers and accounting entities such as cost centers or business units) to purchasing units.

By mapping data to purchasing units, you differentiate sets of data according to purchasing unit. Differentiating sets of data, along with associating users with purchasing units, can affect which data users can see in choosers, search results, and reports.

The type of ERP you use (PeopleSoft, SAP, or Generic) determines which data you can map to purchasing units.

Visibility Control Feature

When enabled, the visibility control feature is a key part of purchasing unit implementation.

Visibility control:

- Restricts visibility of approvables so that users can see only the approvables for which they are the requester or preparer (and the approvables that belong to the purchasing units they are responsible for, if responsible users are configured).
- Extends the responsible user concept from workflow separation to data separation and security by:
 - Expanding the approvable document and approval flow constraints provided by responsible user assignments (`ResponsibleUser.csv`)
 - Considering responsible users when filtering some choosers
 - Placing visibility constraints on search results and reporting based on responsible user assignments
- Enables administrators to use the **User Manager** workspace to manage responsible user assignments.
- Enables administrators to configure their site to allow users to request changes to their responsible user assignments for specific groups.
- Enables filtering of contracts by purchasing unit during contract creation and management, which limits the contracts that are available to be attached automatically or manually when creating a requisition.

SAP Ariba Customer Support can enable visibility control in your system by setting parameter values.

In addition, members of a user group can view suppliers associated with the approvable documents irrespective of their purchasing units even if visibility control is enabled. To enable this feature, have your Designated Support Contact log a service request, and an SAP Ariba Customer Support representative will contact you.

For more information about visibility control, see [Filtering in Search Results, Manage Operations, and Reports \[page 25\]](#). Refer to the table in [Functionality and Requirements Reference \[page 41\]](#) to see which purchasing unit features require visibility control.

For more information about contract filtering, see [Purchasing Unit Filtering of Contracts \[page 28\]](#).

Data and Business Rules Shared Between Purchasing Units

All purchasing units within a site share some of the same data and the same business rules.

Following are some examples of what is shared between purchasing units within a site:

- Units of measure
- System-level parameters (default payment terms, holidays, escalation time frames, auto receiving, change orders)
- Invoice exception types (including tolerances)
- Custom fields
- Default language
- Default currency
- Approval processes
- Separate data export events routed to a specific ERP
- Unique branding and print layout (except for purchase orders, which can differ by purchasing unit)

Purchasing Units and Associated Users

There are two types of associations you can make between users and purchasing units: mapping users to purchasing units they belong to, and configuring users to have group responsibilities.

- Map users to the purchasing units they belong to in the file `User.csv`. Each user belongs to one purchasing unit. This mapping determines which purchasing unit is listed in approvables created by the users.
- Configure users to have group responsibilities that span multiple purchasing units in the file `ResponsibleUser.csv`. Users can act on approvables from any purchasing units for which they are responsible users. Configuring responsible users affects approval flows and can affect the visibility of data in search and manage operations and in reports.

[Assigning of Users to the Purchasing Units They Belong To \[page 10\]](#)

[Making Users Responsible for Multiple Purchasing Units \[page 11\]](#)

Assigning of Users to the Purchasing Units They Belong To

There are two types of associations you can make between users and purchasing units. You can map users to the purchasing units they belong to in the file `User.csv`, or you can configure users to have group responsibilities that span multiple purchasing units in the file `ResponsibleUser.csv`.

Note

You can also configure user group responsibilities in the Ariba Administrator user interface if the visibility control feature is enabled.

These two types of associations have different effects on approvables and the visibility of data.

Assigning Users to the Purchasing Units They Belong To

Each user can be mapped to only one purchasing unit. Multiple users can be mapped to a single purchasing unit.

For example, Chad Noll and Arnold Davis can both be mapped to the Western Europe purchasing unit, but Chad Noll cannot be mapped to both the Western Europe and Eastern Europe purchasing units.

You can assign users to purchasing units through the `PurchasingUnit` column in the `UserConsolidated.csv` or `User.csv` file. If purchasing units are defined in your system, you should map every user to a purchasing unit. For information about CSV files for user information, see [Data Import Tasks for User Information](#).

You do not need to map users to purchasing units in SAP and PeopleSoft variants because users are mapped to SetID (PeopleSoft) and Company Code (SAP ERP), which are in turn mapped to purchasing units.

For some types of approvable, when a user who is assigned to a purchasing unit creates an approvable, the user's purchasing unit appears in the **Purchasing Unit** field of the approvable. The **Purchasing Unit** field in approvable is a required field. It must contain a value when the user creates the approvable.

For users who are not assigned a purchasing unit and whose accounting data is also not mapped to a purchasing unit, the user and the accounting data is mapped to the All purchasing unit. When this is the case, the **Purchasing Unit** field of approvable the user creates is not populated, and the approvable cannot be submitted.

Mapping users to purchasing units does not affect approval flows. For approval flows to be based on purchasing units, you must configure responsible users.

Related Information

[Making Users Responsible for Multiple Purchasing Units \[page 11\]](#)

Making Users Responsible for Multiple Purchasing Units

You can configure a user to be responsible for multiple, specific purchasing units on behalf of a group, such as the **Expense Administrator** group. This concept is called responsible users.

For example, user Chad Noll could be:

- A purchasing manager responsible for procurement tasks for their own purchasing unit and several others
- A budget approver responsible for budget approval tasks for just one purchasing unit
- An expense manager for the All purchasing unit (the parent of all purchasing units)

Configuring responsible users enables you to take advantage of the following purchasing unit features:

- Approvable are routed only to approvers in the relevant purchasing unit.
- Visibility of data in search results and reports is based on purchasing unit responsibilities (if the visibility control feature is enabled).
- Contract lists are filtered based on purchasing unit responsibilities (if visibility control and contract filtering are turned on).

Note

Unlike approval request notifications, administrative notifications that are sent to groups (for example, ship notices sent to the **Purchasing Administrator** group) are not filtered by purchasing unit. For information about notifications sent to groups, see [Managing Email Notifications and Recipients](#).

A user's purchasing unit responsibilities are listed in the **Limited Responsibilities** section of the user profile. For example, user Chad Noll (cno11) could be an expense administrator for six purchasing units, and an invoice administrator, payment administrator, purchasing administrator, and receiving administrator for just one purchasing unit.

Note

The maximum number of purchasing units that can be assigned to a group in the **Limited Responsibilities** section depends on the **Limit for purchasing units assigned to a group** (`Application.Common.LimitForPurchasingUnitsAssignedToAGroup`) parameter. The default value of this parameter is **100**. For more information about this parameter, see [Limit for purchasing units assigned to a group](#).

There are two ways to set up responsible users.

You can set up responsible users in the file `ResponsibleUser.csv`. For example, to make user Chad Noll (cnoll) an expense administrator for six purchasing units, and an invoice administrator, payment administrator, purchasing administrator, and receiving administrator for just one purchasing unit, you can create the following entries in `ResponsibleUser.csv` file:

```
Group,UniqueName,PasswordAdapter,PurchasingUnit
Expense Administrator,cnoll>PasswordAdapter1,DEU01
Expense Administrator,cnoll>PasswordAdapter1,GBR01
Expense Administrator,cnoll>PasswordAdapter1,US100
Expense Administrator,cnoll>PasswordAdapter1,US005
Expense Administrator,cnoll>PasswordAdapter1,SNG01
Expense Administrator,cnoll>PasswordAdapter1,US002
Invoice Administrator,cnoll>PasswordAdapter1,US002
Payment Administrator,cnoll>PasswordAdapter1,US002
Purchasing Administrator,cnoll>PasswordAdapter1,US002
Receiving Administrator,cnoll>PasswordAdapter1,US002
```

If the visibility control feature is enabled, you can manage responsible user assignments using the **User Manager** workspace, and you can also configure your site to allow users to request changes to their responsibilities through user profile requests.

Note

If you set up responsible users, users aren't automatically responsible for the purchasing units they belong to. If you want a user's group membership to apply to the purchasing unit the user belongs to, you must include a record for that user, group, and purchasing unit in the `ResponsibleUser.csv` file.

[Responsible Users and Approval Flows \[page 12\]](#)

[Responsible Users for the All Purchasing Unit \[page 13\]](#)

[Access to Approvable Documents for Responsible Users \[page 14\]](#)

Responsible Users and Approval Flows

Purchasing unit responsibilities affect approval flows in a number of ways.

- For each group listed in `ResponsibleUser.csv` or configured with responsible users in the **User Manager** workspace, the SAP Ariba solution generates a subgroup that contains only the users who are responsible for that purchasing unit.
- Users without purchasing unit responsibilities aren't added to the approval flow of approvable documents for a given purchasing unit if a responsible user exists for that purchasing unit.

- When an approval group is added to an approval flow (for example, the **Invoice Manager** group), the approval process checks to see if any of the users who belong to that group are responsible for the purchasing unit associated with the approvable.

If there are responsible users, the group in the approval flow is replaced by a subgroup that includes only the users who are responsible for the purchasing unit listed in the approvable.

If none of the users in the group are responsible for the purchasing unit of the approvable, system behavior depends on whether visibility control is enabled:

- If visibility control parameter is enabled, the system checks if there are any responsible users for the parent purchasing unit for that group. It keeps checking up the purchasing unit hierarchy until responsible users are found, ending with a check for members of the approval group who are responsible for the **All** purchasing unit. If there are still no active group members responsible for the top-level purchasing unit, the **Customer Administrator** is added to approve.
- If visibility control isn't enabled, the approval request is sent to all members of the approval group.

On the approval flow diagram, an approval subgroup appears with the same name as the original group. However, when you click the group name, the details of the group include an additional field named **Context** that shows the purchasing unit associated with the private group.

Note

When the approval flow includes the requester's supervisor, the supervisor is added regardless of whether the requester and supervisor belong to the same purchasing unit.

The purchasing unit hierarchy doesn't affect which approvables a user can take action on (for example, which approvables they can approve or deny). Users who can act on approvables from a purchasing unit can't necessarily act on approvables from a child or parent of that purchasing unit unless they're responsible for the child or parent purchasing unit.

Note

If your purchasing unit setup includes the responsible user capability, note the following: A user without explicit purchasing unit responsibilities isn't added to the approval flow of approvables from a given purchasing unit if the approval group includes a responsible user for that purchasing unit. This is true regardless of which purchasing unit the user belongs to.

Responsible Users for the **All** Purchasing Unit

You can make users responsible for the **All** purchasing unit, which is the parent of all purchasing units. This is useful when an approver group that is included in the approval flow, and its purchasing unit hierarchy, doesn't contain any members responsible for the indicated purchasing unit.

For example, there may be cases when a non-PO invoice comes in from SAP Business Network, the email address specified doesn't match any user, and there's no purchasing unit associated with the invoice. If the **Invoice Administrator** group is part of the approval flow, and visibility control is enabled, the approval request is sent to members of the **Invoice Administrator** group who are responsible for the **All** purchasing unit. If no one is responsible for the **All** purchasing unit, the **Customer Administrator** group is added to the approval flow.

The following `ResponsibleUser.csv` entry makes user `adavis` responsible for the `All` purchasing unit as **Invoice Administrator**. (The word `All` is case-sensitive.)

```
Group,UniqueName,PasswordAdapter,PurchasingUnit
Invoice Administrator,adavis>PasswordAdapter1,All
```

Access to Approvable Documents for Responsible Users

Responsible user assignments determine which approvables a user sees when viewing a list of approvable documents (for example, the payment requests listed on the **Payments** page in SAP Ariba Buying and Invoicing).

Note

Searching and reporting are not limited by purchasing unit unless visibility control is enabled. For more information, see [Associating Users with Purchasing Units \[page 10\]](#).

- For certain types of approvables, the documents listed in the user interface are limited to the approvables from the purchasing units the user is responsible for. For example, if user Chad Noll is responsible for just one purchasing unit (US002) as a member of the **Payment Administrator** group, when he views the **Payments** page, he can see only the payment transactions that belong to purchasing unit US002 and the child purchasing units of US002.
- Some approvables refer to multiple purchasing units. For example, an invoice might contain multiple orders, and each order is associated with a purchasing unit. If the purchasing units are identical throughout the approvable, it belongs to that purchasing unit. Otherwise, it belongs to the purchasing unit of the document that was added most recently to the approvable (for example, the purchasing unit of the most recently added order on an invoice).
- In general, if visibility control is not enabled, the visibility of approvables is based on the permissions granted to the groups the user is a member of. In this case, visibility is not based on purchasing units at all.
- If the **Restrict data visibility based on purchasing unit responsibilities** (`Application.Approvable.OrganizationalVisibilityPartitioning`) parameter is enabled and the **Report Manager** group is mapped to the **All** purchasing unit, members of the **Report Manager** group can view all approvables. If these users are also members of the **Edit Approvable** group, they can edit the approvables for all the purchasing units even if the **Edit Approvable** group is mapped to some specific purchasing units.

Responsible Users and Contract Filtering

If filtering contracts by purchasing unit is enabled in your system, users can create contracts only for the purchasing units for which they are responsible and any child purchasing units.

Contracts users can select during creation of approvables (requisitions and invoices) are limited to the contracts associated with the purchasing units they are responsible for and any parent purchasing units.

For information on filtering contracts by purchasing unit, see [Purchasing Unit Filtering of Contracts \[page 28\]](#).

ⓘ Note

This feature requires visibility control. Also, to enable contract filtering by purchasing unit, SAP Ariba Customer Support must set the following parameter:
`Application.Contract.MasterAgreement.EnablePurchasingUnitBasedAccess.`

Related Information

[Restrict data visibility based on purchasing unit responsibilities](#)

Filtering of Information Based on Purchasing Units

Filtering on purchasing units can be handled in two ways: user interface filters and the visibility control feature.

- Purchasing unit filtering in the user interface filters the choosers available from approvables—for example, supplier choosers—based on purchasing unit. This type of filtering does not require the visibility control feature to be enabled.
- With the visibility control feature enabled, the filtering of choosers, search results, manage operations, and reports considers which purchasing units the user is responsible for (as defined through responsible user assignments). Visibility control filtering is primarily for types of data that must be shown or hidden based on responsible user assignments. This can include suppliers, too. (If your site includes contract filtering by purchasing unit, contracts are filtered based on responsible user assignments, too. See [Purchasing Unit Filtering of Contracts \[page 28\]](#).)

The results of these two types of filtering overlap.

Note

Purchasing units are designed for data filtering within a single company, not for separating data between companies. If you need to separate data among different companies, talk to SAP Ariba Customer Support about setting up an SAP Ariba solution that supports multi-ERP configurations. For a comparison of purchasing units and multi-ERP configurations, see [Purchasing Units vs. Federated Process Control \[page 55\]](#).

The availability of purchasing unit filtering in the user interface depends on the variant of your SAP Ariba solution (PeopleSoft, SAP, or Generic). The following list is a high-level overview of purchasing unit filtering in the user interface:

- Supplier choosers are filtered in all variants.
- Purchasing unit choosers are filtered in all variants.
- User lists (lists populated by user names) are filtered in all variants if visibility control is enabled.
- Account type lists are filtered in PeopleSoft variants.
- In systems configured as the Generic variant, additional purchasing unit filtering is available.

[Purchasing Unit Filtering in the User Interface: PeopleSoft Variant \[page 17\]](#)

[Purchasing Unit Filtering in the User Interface: SAP Variant \[page 19\]](#)

[Purchasing Unit Filtering in the User Interface: Generic Variants \[page 21\]](#)

[Purchasing Unit Hierarchy and Filtering in the User Interface \[page 23\]](#)

[Filtering in Search Results, Reports, and Operations from the Manage Menu \[page 25\]](#)

[Visibility Constraints in Reports \[page 27\]](#)

[Purchasing Unit Filtering of Contracts \[page 28\]](#)

Purchasing Unit Filtering in the User Interface: PeopleSoft Variant

For the PeopleSoft variant, purchasing unit filtering in the user interface affects supplier choosers, user choosers, and accounting choosers. It can also affect other data.

Note

Purchasing unit hierarchy affects purchasing unit filtering in the user interface. For more information, see [Purchasing Unit Hierarchy and Filtering in the User Interface \[page 23\]](#).

[Supplier Choosers in Peoplesoft Variants \[page 17\]](#)

[User Choosers in PeopleSoft Variants \[page 18\]](#)

[Accounting Choosers in PeopleSoft Variants \[page 18\]](#)

[How Other Data Is Filtered in PeopleSoft Variants \[page 18\]](#)

[Account Type Filtering in Peoplesoft Variants \[page 18\]](#)

Supplier Choosers in Peoplesoft Variants

Supplier lists in approvables are filtered based on the purchasing unit of the approvable. That is, the filtered lists display only the suppliers associated with the same purchasing units as the approvable and with parent purchasing units.

If the approvable is not associated with a purchasing unit, the supplier list is filtered based on the user's purchasing unit and parent purchasing units.

Supplier choosers are filtered regardless of whether visibility control is enabled. If visibility control is enabled, the system also shows suppliers mapped to the purchasing units a user is responsible for and the corresponding parent purchasing units.

You define supplier and purchasing unit associations in the `Supplier.csv` file by populating the `PurchasingUnits` column with the relevant purchasing units.

Note

Supplier filtering by purchasing unit is in addition to any existing supplier filtering by PeopleSoft business unit. In other words, users can see the suppliers that are mapped to their purchasing unit and the suppliers that are mapped to their SetID.

There is no supplier filtering in the following cases:

- Adding a supplier location for a purchasing card
- Working with supplier data in the **Supplier Manager** workspace of Ariba Administrator
- Creating receiving types by part number

User Choosers in PeopleSoft Variants

Unlike supplier choosers, user lists (such as the **On Behalf Of** list) are filtered based on purchasing unit only when visibility control is enabled.

When visibility control is enabled:

- Users can see other users in the purchasing units for which they are responsible.
- If responsible users are assigned, users can see other users who are in the purchasing units they are responsible for.

Accounting Choosers in PeopleSoft Variants

The values a user can see in the business unit, general ledger business unit, department, and account type choosers (filtered by commodity code and purchasing unit through `ERPCommodityCodeMap.csv`) are filtered based on purchasing unit, regardless of whether visibility control is enabled.

Filtering of these accounting entities by purchasing unit is in addition to any existing filtering by PeopleSoft SetID. In other words, users can see the accounting units that are mapped to their purchasing unit and the accounting units that are mapped to their SetID.

Note

Accounting combinations take precedence over purchasing unit filtering. Accounting choosers are only filtered by purchasing unit when an accounting combination does not already exist to restrict the chooser. For information on configuring accounting combinations, see [Import Accounting Combinations](#).

How Other Data Is Filtered in PeopleSoft Variants

In SAP Ariba systems configured to work with PeopleSoft, the only choosers filtered based on purchasing unit are supplier choosers, user choosers, and some accounting choosers. Other fields and choosers are filtered by the user's PeopleSoft SetID. The values a user sees in fields and choosers are based on the PeopleSoft SetID.

For example, suppose user Jack Thornton is associated with SetID `EGVL1`. When he creates an approvable document, the document defaults to SetID `EGVL1`, and the fields and choosers are filtered based on SetID `EGVL1`. If Jack changes the SetID of the approvable document, field and list filtering changes to use the new SetID.

Account Type Filtering in Peoplesoft Variants

In PeopleSoft variants, the list of account types for line items on requisitions, contracts, and invoices can be filtered based on the purchasing unit to which the requester belongs, in addition to being filtered based on the specified commodity code.

When account type filtering is set up on a site, when users add line items to a requisition (for example), they see only the account types associated with their purchasing unit and the specified commodity code. To cite a use case,

suppose user Chad Noll belongs to purchasing unit US001. Purchasing unit US001 has only one account type, Capital, associated with it. When Chad Noll creates a requisition with the commodity code for plasma displays, only the Capital account type is available for selection in the **Account Type** dropdown, even if other valid account types exist for that commodity code.

You set up account type filtering in the `ERPCommodityCodeMap.csv` file. A sample of this file is shown here:

```
UTF-8

Account,AccountType,BillTo,CommonId,CurrForMinAndMaxAmt,PartitionedCommodityCode,Set
Id,ShipTo,CommonIdDomain,DeliverTo,MaxAmt,MinAmt,Preferred,PurchasingUnit

SHARE:131000,Capital,43211903,SHARE:00003,SHARE,SHARE:US013,unspsc,300,100,No,US001

SHARE:631000,Lease,43211903,SHARE:00017,SHARE,SHARE:DEU02,unspsc,500,300,Yes,US002
SHARE:131000,Expense,43211903,SHARE:00003,SHARE,SHARE:US013,unspsc,Arnold
Davis,700,5000,No,US003
```

Existing requisitions that were already approved before account type filtering was set up have unfiltered **Account Type** values.

Purchasing Unit Filtering in the User Interface: SAP Variant

For the SAP variant, purchasing unit filtering in the user interface affects supplier choosers, user choosers, and accounting choosers. It can also affect other data.

Note

- Purchasing unit hierarchy affects purchasing unit filtering in the user interface. For more information, see [Purchasing Unit Hierarchy and Filtering in the User Interface \[page 23\]](#).
- There is no filtering for company code. The purchasing unit and the company code have a one-to-one mapping, so the filtering occurs on the purchasing unit rather than directly on the company code.

[Supplier Choosers in SAP Variants \[page 20\]](#)

[User Choosers in SAP Variants \[page 20\]](#)

[Accounting Choosers in SAP Variants \[page 20\]](#)

[How Other Data Is Filtered in SAP Variants \[page 21\]](#)

Supplier Choosers in SAP Variants

Supplier lists in approvables are filtered based on the purchasing unit of the approvable. That is, the filtered lists display only the suppliers associated with the same purchasing units as the approvable and with parent purchasing units.

If the approvable is not associated with a purchasing unit, the supplier list is filtered based on the user's purchasing unit and parent purchasing units.

Supplier choosers are filtered regardless of whether visibility control is enabled. If visibility control is enabled, the system also shows suppliers mapped to the purchasing units a user is responsible for and the corresponding parent purchasing units.

You define supplier and purchasing unit associations in the `Supplier.csv` file by populating the `PurchasingUnits` column with the relevant purchasing units.

Note

Supplier filtering by purchasing unit is in addition to any existing supplier filtering by SAP purchase organization. In other words, users can see the suppliers that are mapped to their purchasing unit and the suppliers that are mapped to their purchase organization.

There is no supplier filtering in the following cases:

- Adding a supplier location for a purchasing card
- Working with supplier data in the **Supplier Manager** workspace of Ariba Administrator
- Creating receiving types by part number

User Choosers in SAP Variants

Unlike supplier choosers, user lists in SAP (such as the **On Behalf Of** list) are filtered based on purchasing unit only when visibility control is enabled.

When visibility control is enabled:

- Users can see other users in the purchasing units for which they are responsible.
- If responsible users are assigned, users can see other users who are in the purchasing units they are responsible for.

Accounting Choosers in SAP Variants

Each company code should be mapped to a purchasing unit. The filtering occurs based on the company code only. In other words, users can see the accounting units that are mapped to their purchasing unit and the accounting units that are mapped to their company code.

How Other Data Is Filtered in SAP Variants

In SAP Ariba solutions configured to work with SAP ERP, the only choosers filtered based on purchasing unit are supplier, user, and some accounting choosers. Other fields and choosers are filtered by the user's SAP company code, restricting field and filter values seen to those based on the SAP company code.

For example, suppose user Alex Agassi is associated with SAP company code 3000. When he creates an approvable document, the document defaults to company code 3000 and the fields and lists are filtered based on company code 3000. If Alex changes the company code of the approvable document, field and list filtering changes to use the new company code.

Purchasing Unit Filtering in the User Interface: Generic Variants

In SAP Ariba solutions configured as the Generic variant, the values a user can see in choosers are filtered by purchasing unit.

In all cases except for choosers that list users, filtering by purchasing unit occurs regardless of whether visibility control is enabled.

[User Lists in the Generic Variant \[page 21\]](#)

[Other Choosers in the Generic Variant \[page 22\]](#)

[Payment Terms in the Generic Variant \[page 23\]](#)

User Lists in the Generic Variant

Unlike supplier choosers, user lists (such as the **On Behalf Of** list) are filtered based on purchasing unit only when visibility control is enabled.

When visibility control is enabled:

- Users can see other users who are in the same purchasing unit.
- If responsible users are assigned, users can see other users who are in the purchasing units they are responsible for.
- Depending on the business context, user lists may also include users from child or parent purchasing units.

Other Choosers in the Generic Variant

In SAP Ariba solutions configured as the Generic variant, the values a user can see in many choosers are filtered based on the approvable's purchasing unit, regardless of whether visibility control is enabled.

Choosers filtered on the approvable's purchasing unit include:

- Company
- Business unit
- Cost center
- Project
- Product
- Account
- Subaccount
- Payment terms
- Supplier
- Supplier location
- Contract
- Address
- Region

The visibility control feature can extend purchasing unit filtering in the user interface to data that requires hiding or visibility based on responsible user assignments, including supplier data in Generic variants. This type of filtering is different from the filtering discussed in this section.

Note

Accounting combinations take precedence over purchasing unit filtering. Accounting choosers (cost center, project, product, account, and subaccount) are only filtered by purchasing unit when an accounting combination does not already exist to restrict the chooser. (Company choosers are filtered based on cost center, and business unit choosers are filtered based on company.) For information on configuring accounting combinations, see [Import Accounting Combinations](#).

Transactional data exports do not include purchasing unit filtering.

There is no supplier filtering in the following cases:

- Adding a supplier location for a purchasing card
- Working with supplier data in the **Supplier Manager** workspace of Ariba Administrator
- Creating receiving types by part number

Purchasing unit hierarchy is considered when filtering objects. Consider the following example and illustration in which the Cost Center and Project accounting objects are mapped to purchasing units:

- Purchasing unit PU1 is a child of purchasing unit A11.
- Purchasing unit PU2 is a child of purchasing unit PU1.
- User cnoll is assigned to purchasing unit PU1.
- User adavis is assigned to purchasing unit PU2.
- Cost Center A is mapped to ALL.
- Cost Center B is mapped to PU1.

- Cost Center C is mapped to PU2.
- Project A is mapped to PU1.
- Project B is mapped to PU2.

Users can see accounting objects **up** the purchasing unit hierarchy. That is, they can see accounting objects mapped to their own purchasing unit and any parent purchasing units.

Payment Terms in the Generic Variant

In Generic variants of SAP Ariba Buying and Invoicing and SAP Ariba Invoice Management solutions, you can configure payment terms specific to each purchasing unit.

Members of the **Supplier/Customer Manager** and **Customer Administrator** groups can use the **Supplier Manager** workspace in Ariba Administrator to edit supplier profiles, change payment terms, and specify the default payment terms for each purchasing unit.

Purchasing units are included in the `PaymentTerms.csv` or `PaymentTermsConsolidated.csv`, and the `Supplier.csv` files. For more information, see [CSV File Reference for Purchasing Unit Data \[page 43\]](#).

When creating invoices and contracts in SAP Ariba Buying and Invoicing and SAP Ariba Invoice Management, users can choose a purchasing unit and select payment terms from the list available to the specific purchasing unit, to all purchasing units, and to parents and children of the specific purchasing unit.

Purchasing Unit Hierarchy and Filtering in the User Interface

This table lists types of data and describes visibility up or down the purchasing unit hierarchy.

The table does not include the filtering of contracts. For more information, see [Purchasing Unit Filtering of Contracts \[page 28\]](#).

Consider a Europe purchasing unit hierarchy (under the A11 unit) that includes two child units: Western Europe and Eastern Europe. Western Europe includes child units Germany, France, and Switzerland, and Eastern Europe includes Czech Republic, Poland, and Hungary.

Type of Data	Visibility Up or Down the Hierarchy	Explanation and Example
Supplier choosers in approvables (All variants)	Visibility up the hierarchy. Users can choose from suppliers mapped to the purchasing unit of the approvable and any parent purchasing units.	Users viewing an approvable from the Western Europe purchasing unit can see the suppliers mapped to Western Europe and A11. They cannot see suppliers mapped to Germany, Switzerland, and France. They also cannot see suppliers mapped to Eastern Europe and its child purchasing units.

Type of Data	Visibility Up or Down the Hierarchy	Explanation and Example
Purchasing unit choosers in approvables (for example, for invoice data entry) (All variants)	<p>If visibility control is enabled, there is visibility down the hierarchy. The chooser shows the purchasing units the user is responsible for and child purchasing units.</p> <p>If visibility control is not enabled, all purchasing units are shown.</p>	<p>If visibility control is enabled, users responsible for the Western Europe purchasing unit can see Western Europe, Germany, France, and Switzerland in purchasing unit choosers.</p> <p>They cannot see Europe, All, or Eastern Europe and its children.</p>
User choosers in approvables (for example, the On Behalf Of list) (All variants)	<p>If visibility control is enabled, there is visibility down the hierarchy. Choosers are filtered based on the purchasing units the user is responsible for and child purchasing units.</p> <p>If visibility control is not enabled, there is no user filtering based on purchasing unit.</p>	<p>Users responsible for the Western Europe purchasing unit can see users mapped to the Western Europe, Germany, France, and Switzerland purchasing units.</p> <p>They cannot see users mapped to Europe, All, and Eastern Europe and its children.</p>
Account choosers in approvables (All variants)	<p>Visibility up the hierarchy.</p> <p>Users can choose from one of the accounting fields mapped to their own purchasing unit and any parent purchasing units.</p>	<p>Users mapped to Western Europe (in <code>User.csv</code>) can see the accounts mapped to Western Europe and All.</p> <p>They cannot see accounts mapped to Germany, Switzerland, France, or Eastern Europe and its children.</p>
Account type choosers in requisitions, contract requests, and invoices (PeopleSoft variants)	<p>Visibility down the hierarchy.</p> <p>Users can choose from one of the account types mapped to the requester's purchasing unit and associated child purchasing units (and to the specified commodity code).</p>	<p>Users mapped to Western Europe (in <code>User.csv</code>) can see the account types that are mapped to Western Europe, Germany, France, and Switzerland purchasing units.</p> <p>They cannot see account types mapped to All, Europe, or Eastern Europe and its children.</p>
Cost center choosers in approvables (Generic variants only)	<p>Visibility up the hierarchy.</p> <p>Users can choose from cost centers mapped to their own purchasing unit and parent purchasing units.</p>	<p>Users mapped to Western Europe (in <code>User.csv</code>) can see the cost centers mapped to Western Europe, Europe, and All.</p> <p>They cannot see cost centers mapped to Germany, France, Switzerland, or Eastern Europe and its children.</p>
<div style="background-color: #e0e0e0; padding: 5px; border: 1px solid #ccc;"> <p>Note</p> <p>Purchasing unit filtering in the user interface is not applied to Business Unit or Company choosers.</p> </div>		
Shipping and billing address choosers in approvables (Generic variants only)	<p>Visibility up and down the hierarchy.</p> <p>Users can choose from shipping and billing information mapped to their own purchasing unit and any child and parent purchasing units.</p>	<p>Users mapped to Western Europe (in <code>User.csv</code>) can see the shipping and billing information mapped to Western Europe, Germany, France, Switzerland, Europe, and All.</p> <p>They cannot see shipping and billing information mapped to Eastern Europe and its child purchasing units.</p>

Related Information

[Visibility Constraints in Reports \[page 27\]](#)

[Filtering in Search Results, Reports, and Operations from the Manage Menu \[page 25\]](#)

Filtering in Search Results, Reports, and Operations from the Manage Menu

If visibility control is enabled and responsible users are configured, the data users can see in search results, manage operations (such as **Manage > Contracts**), and reports is based on the responsible user assignments for purchasing units.

[Search Constraints Imposed on Users in “query All” Groups \[page 25\]](#)

[Search Constraints When Searching for Approvables \[page 26\]](#)

[Search Constraints When Searching for Users \[page 26\]](#)

[Search Constraints When Searching for Suppliers \[page 27\]](#)

[Visibility Constraints in Contract Lists \[page 27\]](#)

Search Constraints Imposed on Users in “query All” Groups

Most users can search for their own approvables and those of their subordinates only. Groups referred to as query all groups extend approvable document search results (and choosers) for the members of those groups so they can search for (and select) additional approvables.

For example, the **Invoice Agent** group is a query all group, as is the **Purchasing Manager** group.

For members of a query all group, search results and choosers contain all approvables that pertain to that group. Members of the **Purchasing Manager** group can search for all requisitions, for example, regardless of the requester.

Note

Query all is not part of the name of any group. Rather, query all describes what group members can do. For example, members of the **Purchasing Manager** group can query all the approvable documents in the purchasing flow. For information about individual query all groups, see the product documentation about group descriptions. You can search that online manual for the string `query all`, because it appears in the group descriptions.

In SAP Ariba systems where purchasing units and responsible users are implemented, the visibility control feature imposes restrictions on these query all groups, narrowing the definition of **all approvables** to mean all approvables in the purchasing units you are responsible for.

If visibility control is not enabled, members of query all groups can search for all approvables of a certain type, regardless of the requester and regardless of whether purchasing units are implemented. Also, all approvables of a certain type are included in approvable choosers.

Search Constraints When Searching for Approvables

For a user who is a member of a query all group, the visibility control feature limits search results and choosers to approvables that belong to purchasing units the user is responsible for and to any child purchasing units. There is visibility down the hierarchy.

For example, a member of the **Invoice Manager** group who is responsible for the Western Europe purchasing unit can find invoices for the child purchasing units: Germany, France, and Switzerland.

When assigning users to a query all group, keep the following points in mind regarding responsible users and approvables:

- Users can always search for the approvables they create, even if those approvables are associated with purchasing units they are not responsible for.
- Users cannot search for their subordinates' approvable documents if those documents belong to purchasing units they are not responsible for.
- Users who are not responsible for any purchasing units cannot search for any approvable documents that belong to other users.

Search Constraints When Searching for Users

For a user who is a member of a query all group, the visibility control feature limits search results and choosers that contain users. Users can search for other users in their own purchasing unit and any purchasing units they are responsible for.

Users can also search for other users in the child purchasing units of their own purchasing unit and of any purchasing units they are responsible for. (There is visibility down the hierarchy.)

When assigning users to a query all group, keep the following points in mind regarding user search results and choosers:

- Users responsible for the ALL purchasing unit can search for all users.
- Users can search for all users that do not belong to any purchasing unit.

For example, consider a user responsible for the Western Europe purchasing unit. The user can search for users in the Western Europe purchasing unit and its child units: Germany, France, and Switzerland.

When a user creates an approvable, the user names available in user choosers (for example, the **On Behalf Of** chooser) are filtered based on the purchasing unit associated with each user in `USER.csv`.

When the visibility control feature is not enabled, there are no constraints on searches for users.

Search Constraints When Searching for Suppliers

In SAP Ariba solutions configured as the Generic variant, for a user who is a member of a query all group, the visibility control feature limits search results and choosers that contain suppliers. Users can search for suppliers mapped to their own purchasing unit and any purchasing unit they are responsible for.

They can also search for suppliers mapped to the parent purchasing units of their own purchasing unit and of any purchasing units they are responsible for. (There is visibility up the hierarchy.)

When assigning users to a query all group, keep the following points in mind regarding supplier search results in Generic variants:

- Users who are responsible for the A11 purchasing unit can search for all suppliers.
- Users can search for all suppliers that do not belong to any purchasing unit.

For example, consider a user responsible for the Western Europe purchasing unit. The user can search for suppliers in the Western Europe purchasing unit and its parent purchasing units, Europe and A11.

When the visibility control feature is not enabled, there are no constraints on searches for suppliers. (Supplier choosers in approvables, however, are still filtered based on the purchasing unit of the approvable, as discussed in the sections on purchasing unit filtering in the user interface earlier in this chapter.)

Visibility Constraints in Contract Lists

If your SAP Ariba solution includes the feature for filtering contracts by purchasing unit, when creating requisitions and invoices, the contracts a user can select from are limited to the contracts associated with the purchasing units the user is responsible for and any parent purchasing units. (There is visibility up the hierarchy.)

For information about contract filtering, see [Purchasing Unit Filtering of Contracts \[page 28\]](#).

Visibility Constraints in Reports

If your system includes visibility control for reporting, there are visibility constraints on facts and dimensions in reports. Facts represent approvable documents, and dimensions represent non-approvable objects, such as users and suppliers.

SAP Ariba Customer Support can enable visibility control for reporting by setting the parameter `Application.Analysis.BuyerReportingVisibilityControl`. When the visibility control feature is not enabled for reporting, there are no query constraints on facts and dimensions.

Visibility Control and Report Facts

When visibility control is enabled for reporting, the constraints that apply to facts are the same as the constraints that apply to searches for approvable documents with one exception: users cannot query their own approvable documents if those documents belong to purchasing units they are not responsible for.

For more information, see [Search Constraints When Searching for Approvables \[page 26\]](#).

Visibility Control and Report Dimensions

Visibility constraints apply to the user and supplier dimensions in reports.

- The user dimension is filtered in same way as the **On Behalf Of** chooser with one limitation: the search results do not include users in child purchasing units.
- In SAP Ariba solutions configured as the Generic variant, the supplier dimension is filtered the same way as the supplier choosers. That is, unlike the search constraint for the user dimension, the search constraint for the supplier dimension is hierarchical. Search results include suppliers in parent purchasing units.

Note

For multi-ERP environments that have the visibility control feature enabled, site administrators must assign purchasing unit responsibilities to report users on the parent site in addition to the child site.

For more information, see [Search Constraints When Searching for Users \[page 26\]](#),

Purchasing Unit Filtering of Contracts

Your site can be enabled for enhanced purchasing unit filtering to support selection of the best contract terms during requisitioning or invoicing within a business hierarchy and enhanced selection of parent agreements during sub agreement creation.

This feature allows you to create contracts at purchasing unit level that also apply to child purchasing units, which means you can create contracts to reflect the specific requirements of the purchasing unit and the business environment it operates in. For example, you can create a contract at country/region level (parent purchasing unit) that applies to all plants (child purchasing units) in that country/region. But a plant might have negotiated another contract with the same supplier for better terms, in which case that plant's contract will be used.

Note

You can only create contracts for purchasing units for which you are responsible.

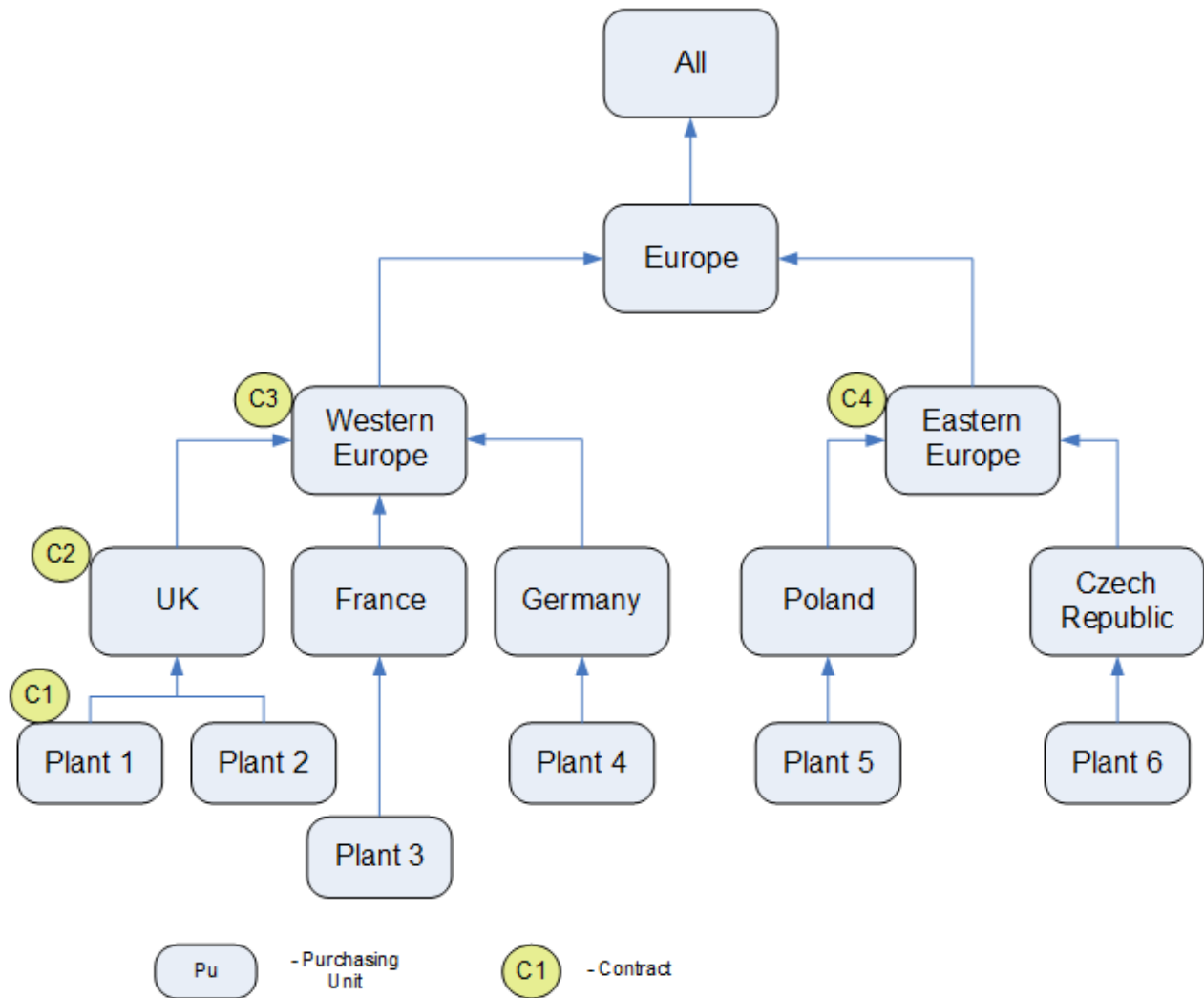


Figure 2: Example of Contract Filtering

In this example, the contracts are applied as follows:

- Plant 1 will have access to all three contracts: C1 (its own contract), and C2 and C3 (contracts specified for the parent purchasing units which applies to all children).
- Plant 2 and UK will have access to contracts C2 and C3.
- Plant 3, Plant 4, France, Germany, and Western Europe will have access to contracts C3.
- Plant 5, Plant 6, Poland, Czech, and Eastern Europe will have access to contracts C4.

To enable contract filtering by purchasing unit, SAP Ariba Customer Support must have turned on the visibility control parameter and the parameter for contract filtering (`Application.Contract.MasterAgreement.EnablePurchasingUnitBasedAccess`).

Purchasing Unit Configuration

Depending on the purchasing unit features you want to use, there are different steps you must take to implement purchasing units fully.

Steps may include:

- There are two site parameters for enabling visibility control:
 - Enabling the **Restrict data visibility based on purchasing unit responsibilities** (`Application.Approvable.OrganizationalVisibilityPartitioning`) parameter for general visibility control
 - Having SAP Ariba Customer Support enable the `Application.Analysis.BuyerReportingVisibilityControl` parameter, which is specific to reporting
- Having SAP Ariba Customer Support enable filtering of contracts during contract creation. (This is controlled by the parameter `Application.Contract.MasterAgreement.EnablePurchasingUnitBasedAccess`.)
- Importing purchasing unit data through `PurchasingUnit.csv` using the **Import Purchasing Units** data import task.
- Assigning users to purchasing units in `User.csv` and run the **Import Users** data import task.
- Assigning users to be responsible for specific purchasing units on behalf of their groups. Do this by populating the `ResponsibleUser.csv` file and running the **Import Responsible User Assignments** data import task. If visibility control is enabled, you can assign responsible users in the **User Manager** workspace.
- Depending on your business needs, you may need to map purchasing units to the appropriate accounting entity from your ERP system (for example, cost center or business unit).
- To differentiate sets of data by purchasing unit (for example, suppliers), you may need to map the data to purchasing units using the CSV files that have a field for purchasing unit information, and import that data.
- If you have approval rules based on requisition limits or expense limits, and you want them to take purchasing units into account, you need to update the approver lookup tables `RequisitionLimit.csv` and `ExpenseLimit.csv`. (See the [Approval Process Management Guide](#).)
- To have purchase orders branded by purchasing unit, ask SAP Ariba Customer Support to configure purchase order branding.
- Receiving tolerances configured for a customer site determine how the SAP Ariba solution handles the receiving of all purchase orders generated for a company regardless of the subsidiary or purchasing unit the purchasing order is associated with.
You can override these site-wide receiving tolerances using the **Import Receiving Tolerance by Purchasing Unit** data import task, which imports tolerances specific to purchasing units. For more information, see [Configuration of Receiving Tolerance at the Purchasing Unit Level](#).

[Import of Purchasing Unit Data \[page 31\]](#)

[Management of Responsible User Assignments in Ariba Administrator \[page 33\]](#)

[Configuring PeopleSoft Accounting Entities as Purchasing Units \[page 37\]](#)

[Configuring SAP ERP Accounting Entities as Purchasing Units \[page 38\]](#)

[Configuring Purchasing Units in Generic Variants \[page 39\]](#)

Related Information

[Restrict data visibility based on purchasing unit responsibilities](#)

Import of Purchasing Unit Data

Data import tasks included importing purchasing units, and importing responsible user assignments.

The following table lists the data import tasks and CSV files that define purchasing units and purchasing unit responsibilities, and specifies whether the data is required.

Data Import Task	CSV Files Imported	Required
Importing purchasing units [page 31]	PurchasingUnit.csv	No
Importing responsible user assignments [page 32]	ResponsibleUser.csv User.csv	No

Note

Purchasing unit data originates in your ERP system if you configure purchasing units to represent an ERP object.

For detailed descriptions of the CSV files read by these data import tasks, see the Data Dictionary.

Note

In the Data Dictionary, the file name listed for the **Import Purchasing Units** task is PurchasingUnit.csv.

[Import of Purchasing Units \[page 31\]](#)

[Import of Responsible User Assignments \[page 32\]](#)

Import of Purchasing Units

Use the **Import Purchasing Units** data import task to define purchasing units. It reads data from the CSV file named PurchasingUnit.csv.

Following is a simple example of PurchasingUnit.csv. In this example, there is just one level of purchasing units beneath the All purchasing unit.

```
UTF8
Parent,Level,UniqueName,Name,Description
All,,PU1,PU1,Purchasing Unit 1
All,,PU2,PU2,Purchasing Unit 2
```

If you do not want ERP accounting entities to serve as purchasing units, you must manually maintain the `PurchasingUnit.csv` file.

Consider a four-level purchasing unit hierarchy for Europe. The Europe purchasing unit is a child of `All`. Western Europe and Eastern Europe are child units of Europe. Germany, France, and Switzerland are child units of Western Europe, and Czech Republic, Poland, and Hungary are child units of Eastern Europe.

Here is the `PurchasingUnit.csv` content for importing the purchasing units described above:

```
UTF8
Parent,Level,UniqueName,Name,Description
All,,PU1,Europe,Europe
PU1,,PU2,Western Europe,Western Europe
PU1,,PU3,Eastern Europe,Eastern Europe
PU2,,PU4,Germany,Germany
PU2,,PU5,France,France
PU2,,PU6,Switzerland,Switzerland
PU3,,PU7,Czech Republic,Czech Republic
PU3,,PU8,Poland,Poland
PU3,,PU9,Hungary,Hungary
```

To ensure that the purchasing unit name is not missing during the import, you can enable the **Check for missing purchasing unit names during import** (`Application.Procure.CheckForMissingPurchasingUnitNamesDuringImport`) parameter on your site. If the purchasing unit name is missing for a row in the `PurchasingUnit.csv` file, this row is not imported. Other rows are not affected and can still be imported. For more information about the parameter, see [Check for missing purchasing unit names during import](#).

Note

If the **All** purchasing unit is included in the import file, it will be ignored because the **All** purchasing unit is created, by default, in the buying solution after the import task is run.

Import of Responsible User Assignments

Use the **Import Responsible User Assignments** data import task to specify which purchasing units a user's group membership applies to. Purchasing unit responsibilities limit the approvable documents a user can see and approve.

Note

Before you can make a user responsible for a purchasing unit as a member of a particular group, you need to assign the user to that group. For information on assigning users to groups, see [Import User Group Mappings](#).

The **Import Responsible User Assignments** data import task reads data from the following CSV files:

CSV File	Description
<code>ResponsibleUser.csv</code>	Associates purchasing units with users through their group assignments.
<code>User.csv</code>	Contains ERP-specific user information. For more information on this file, see Import Users .

After you import `ResponsibleUser.csv`, it can take up to six hours for the data to be completely processed. This is because, after you import the data, it must be processed by an internal scheduled task (`UpdateOrganizationGroups`). The task runs automatically every six hours. It cannot be run manually.

Note

- Enable **Validate the Group field in the ResponsibleUser.csv file** (`Application.Approvable.ValidateGroupFieldInResponsibleUserCSVFile`) to check for null values in the **Group** field in the `ResponsibleUser.csv` file when defining group responsibilities based on purchasing units. For more information, see [Validate the Group field in the ResponsibleUser.csv file](#).
- Enable **Validate purchasing unit in assigned responsibilities** (`Approvable.ValidatePurchasingUnitInAssignedResponsibilities`) to check for null values in the **Purchasing Unit** field in the `ResponsibleUser.csv` file when defining purchasing unit responsibilities. For more information, see [Validate purchasing unit in assigned responsibilities](#).

Following is an example of `ResponsibleUser.csv`:

```
UTF8
    Group,UniqueName,PasswordAdapter,PurchasingUnit
Purchasing Manager,cnoll,PasswordAdapter1,PU7
Purchasing Manager,cnoll,PasswordAdapter1,PU8
Purchasing Manager,cnoll,PasswordAdapter1,PU9
Purchasing Manager,cnoll,PasswordAdapter1,PU3
Budget Approver,cnoll,PasswordAdapter1,PU3
Purchasing Manager,adavis,PasswordAdapter1,PU4
Purchasing Manager,adavis,PasswordAdapter1,PU5
Purchasing Manager,adavis,PasswordAdapter1,PU6
Purchasing Manager,adavis,PasswordAdapter1,PU2
Budget Approver,adavis,PasswordAdapter1,PU2
```

In this example, user Chad Noll (unique name `cnoll`) is responsible for:

- Purchasing units PU3, PU7, PU8, and PU9 as a member of the **Purchasing Manager** group
- Purchasing unit PU3 as a member of the **Budget Approver** group

Management of Responsible User Assignments in Ariba Administrator

If the visibility control feature is enabled on your site, you can enable users to request changes to their purchasing unit responsibilities through user profile request, and you can manage responsible user assignments in the Ariba Administrator user interface

[Configuring Groups to Allow User Responsibility Requests \[page 34\]](#)

[Allowance of Users to Request Responsibility for Custom Groups \[page 34\]](#)

[Creating an Approval Rule for User Responsibility Changes \[page 35\]](#)

[Assigning Purchasing Unit Responsibilities \[page 36\]](#)

[Enhanced Purchasing Unit Responsibilities Validations for Groups Assigned to Users \[page 36\]](#)

Configuring Groups to Allow User Responsibility Requests

Use this procedure to configure groups to allow user responsibility requests. You can enable users to request changes to their purchasing unit responsibilities. Users request these changes through user profile requests. You determine which groups allow user responsibility requests.

Procedure

1. In Ariba Administrator, click ► **Manage** ► **Core Administration** ► **User Manager** ► **Groups** ►.
2. Find the group you want to configure, and click ► **Actions** ► **Edit.** ►
The **Groups – Edit Group** page opens.
3. Check the **User Can Request Responsibility** checkbox and click **Save.**

Results

The status of the **User Can Request Responsibility** field changes to **Yes**, and the group is now enabled for responsibility requests. All users who belong to the group can request responsibility for specific purchasing units on behalf of the group.

Allowance of Users to Request Responsibility for Custom Groups

To allow users to request purchasing unit responsibilities for custom groups, the `Groups.csv` file contains a column called `Users Can Request Responsibility`.

This column accepts boolean values to indicate whether users can request responsibilities for purchasing units for a particular custom group. The default value for this column is `False`, which indicates that users cannot request responsibility for the group.

Note

The **User Can Request Responsibility** column in the `Groups.csv` file applies to custom groups only. For standard groups, you can use the ► **User Manager** ► **Groups** ► task in Ariba Administrator to configure groups to allow responsibility requests.

In user profiles, you can force users to specify a purchasing unit whenever they add a custom group that allows responsibility requests. To enable this feature, your administrator can enable the **Enforce adding purchasing unit responsibilities for new purchasing unit groups** (`Application.Approvable.MandatoryPUApplicableGroupResponsibility`) parameter.

Related Information

[Enforce adding purchasing unit responsibilities for new purchasing unit groups](#)

Creating an Approval Rule for User Responsibility Changes

Use this procedure to create an approval rule for user responsibility changes. You can configure the approval process for user profiles so that an approver is added whenever a user requests changes to purchasing unit responsibilities.

Prerequisites

Before you can configure the approval process as described in this section, an SAP representative must customize your site's user profiles to include a custom field called **Has Responsibility Changed**.

Procedure

1. Click **Manage > Approval Processes**.
2. Open the **User Profile** approval process.
3. Click **Edit** on the **Approval Rules** tab to make changes to the approval process.
4. Add an approval rule to the approval process.
5. In the **Condition** section, add a field match condition:
 1. Click the down arrow in the **All Are True** subcondition, and choose **Field Match**.
 2. To specify the field, click **Select**, find the **Has Responsibility Changed** field, and click its **Select** link.

Note

The **Has Responsibility Changed** field is available only if SAP Ariba has added it as a custom field.

3. To specify the value to match, click **Select**, select **Yes**, and click **OK**.
6. In the **Action** section, specify the approver to add.

Results

For general information on editing approval rules, see the [Approval Process Management Guide](#).

Assigning Purchasing Unit Responsibilities

Use this procedure to assign purchasing unit responsibilities. You can select users to assign for purchasing unit responsibilities.

Procedure

1. In **Ariba Administrator**, choose **User Manager > Users**.

The **Users** page opens.

2. Find the user you want to work with, and click **Action > Edit** to edit user details.

The **Users – Edit User** page opens.

3. Click the **Groups** tab, which lists the groups to which the user belongs.
4. To assign the user purchasing unit responsibilities for a group, click **Select** in the **Purchasing Units** column of the group, and select the purchasing units for which you want the user to be responsible.

Enhanced Purchasing Unit Responsibilities Validations for Groups Assigned to Users

Buyer sites can be configured to enable validations that check whether purchasing unit responsibilities are selected for groups that allow user responsibility requests.

For some organizations, audit and noncompliance issues might arise if the purchasing unit isn't selected for groups assigned to a user. When user profile changes are made using data import tasks or through the SAP Ariba Administrator user interface, checks are performed to ensure that a purchasing unit is specified whenever a group that allows responsibility requests is added. The check is performed in the following scenarios after the changes are made:

- When a user logs in, all the groups assigned to the user that allow responsibility requests are checked to ensure that purchasing unit responsibilities are selected. If any groups are found without purchasing unit responsibilities, a message is displayed in the **Invalid Fields** page with a list of those groups. We recommend that you make the required changes to your user profile immediately.
- When a user initiates a new user profile change request, or edits an existing request that is yet to be approved, all the existing groups assigned to the user that allow responsibility requests are checked to ensure that purchasing unit responsibilities are selected. If any groups are found without purchasing unit responsibilities, an error message is displayed with a list of those groups. You must select the purchasing unit responsibilities for the required groups before you proceed with the user profile change request.

Prerequisites

Your administrator must enable the following parameters:

- **Restrict data visibility based on purchasing unit responsibilities**
(`Application.Approvable.OrganizationalVisibilityPartitioning`). See [Restrict data visibility based on purchasing unit responsibilities](#).
- **Enforce adding purchasing unit responsibilities for new purchasing unit groups**
(`Application.Approvable.MandatoryPUApplicableGroupResponsibility`). See [Enforce adding purchasing unit responsibilities for new purchasing unit groups](#).
- **Enable enhanced purchasing unit responsibilities validations for groups assigned to users**
(`Application.Approvable.EnableEnhancedPurchasingUnitResponsibilitiesValidationsForGroupsAssignedToUsers`). See [Enable enhanced purchasing unit responsibilities validations for groups assigned to users](#).

Configuring PeopleSoft Accounting Entities as Purchasing Units

Use this procedure to configure PeopleSoft accounting entities as purchasing units. PeopleSoft objects that can serve as purchasing units include business units, general ledger business units, departments, and SetIDs. This example shows how to configure your data so that PeopleSoft business units serve as purchasing units.

Procedure

1. Export business units from your `BusinessUnit.csv` file into the `PurchasingUnit.csv` file.

In the following `PurchasingUnit.csv` file example, SAP Ariba purchasing units represent PeopleSoft business units:

```
UTF8
Parent,Level,UniqueName,Name,Description
All,,AUS01,AUS01,AUSTRALIA OPERATIONS
All,,BLG01,BLG01,BELGIUM OPERATIONS
```

2. Add the `PurchasingUnit` field to the `BusinessUnit.csv` file. The values in this field must match the values in the `UniqueName` field of `PurchasingUnit.csv`.

In the following example, the `PurchasingUnit` field is the last field in the list:

```
UTF8
BUSINESS_UNIT,BUSINESS_UNIT_GL,DESCR,SHIPTOTAB_SETID,SUPPLIERTAB_SETID,CONTRACTTAB_SETID,
BUSINESS_UNIT_AM,ALLOW_MC_REQ,DELIVERTOTAB_SETID,COMMCODETAB_SETID,SETID_BILL_LOCATION_,
ALLOW_MC_PO,CURRENCY_CD,PurchasingUnit
AUS01,AUS01,AUSTRALIA
OPERATIONS,SHARE,SHARE,AUS01,Y,SHARE,SHARE,SHARE:AUS01,Y,AUD,
AUS01
```

```
BLG01,BLG01,BELGIUM
OPERATIONS,SHARE,SHARE,SHARE,BLG01,Y,SHARE,SHARE,SHARE:BLG01,Y,EUR,
BLG01
```

Results

For information on importing business units, see [PeopleSoft Accounting Information](#).

Configuring SAP ERP Accounting Entities as Purchasing Units

Use this procedure to configure SAP ERP accounting entities as purchasing units. SAP ERP objects that can serve as purchasing units include purchase organizations, company codes, cost centers, and purchase groups. This example illustrates how to configure your data so that SAP purchase organizations serve as purchasing units.

Procedure

1. Export purchase organizations from your `PurchaseOrg.csv` file into the `PurchasingUnit.csv` file.

In the following `PurchasingUnit.csv` file example, SAP Ariba purchasing units represent SAP purchase organizations:

```
UTF8
Parent,Level,UniqueName,Name,Description
All,,1,Einkaufsorg. 0001,Einkaufsorg. 0001
All,,1,Zentraleinkauf EU,Zentraleinkauf EU
All,,1000,IDES Deutschland,IDES Deutschland
```

2. Add the `PurchasingUnit` field to the `PurchaseOrg.csv` file. The values in this field must match the values in the `UniqueName` field of `PurchasingUnit.csv`.

In the following example, the `PurchasingUnit` field is the last field in the list:

```
UTF8
EKORG,EKOTX,BUKRS,PurchasingUnit
1,Einkaufsorg. 0001,1,1
1,Zentraleinkauf EU,1
1000,IDES Deutschland,1000,1000
```

Results

For information on importing purchase organizations, see [Import Purchase Organizations](#).

Configuring Purchasing Units in Generic Variants

Use this procedure to configure purchasing units in generic variants. Generic objects that can serve as purchasing units include business units, companies, cost centers, and regions. This example illustrates how to configure business units to serve as purchasing units.

Context

For Generic variants, you can set up mappings between purchasing units and certain organizational, operational, and accounting entities. Mappings can be many-to-one (multiple objects mapped to a single purchasing unit) or many-to-many (multiple objects mapped to multiple purchasing units).

For example, you could map:

- Business unit BU1 to purchasing unit PU1
- Business units BU2, BU3, and BU4 to purchasing unit PU2
- A project called Multimedia Speakers to purchasing units PU1 and PU3

Any object you choose to map to a purchasing unit becomes dependent on the **Import Purchasing Units** data import task. In other words, you must import that object **after** importing your purchasing units.

For reference information on mapping data to purchasing units in CSV files, see [Generic Variant Master Data CSV Files \[page 44\]](#).

Procedure

1. Export business units from your `BusinessUnit.csv` file into the `PurchasingUnit.csv` file.

In the following `PurchasingUnit.csv` file example, purchasing units represent the business units in the SAP Ariba solution:

```
Cp1252
      Parent, Level, UniqueName, Name, Description
All, ,BUY01,BUY01,Dean Jones & Bishop
All, ,BUY02,BUY02,DS Telecommunications
All, ,DEU01,DEU01,GERMANY OPERATIONS
All, ,DEUE1,DEUE1,GERMANY - EURO BASE CURRENCY
```

2. Add the `PurchasingUnit` field to the `BusinessUnit.csv` file. The values in this field must match the values in the `UniqueName` field of `PurchasingUnit.csv`.

In the following example, the `PurchasingUnit` field is the second field in the list:

```
Cp1252
      UniqueName,PurchasingUnit,Name,Description,Company
BUY01,BUY01,BUY01,Dean Jones & Bishop,GD
BUY02,BUY02,BUY02,DS Telecommunications,GD
DEU01,DEU01,DEU01,GERMANY OPERATIONS,05
DEUE1,DEUE1,DEUE1,GERMANY - EURO BASE CURRENCY,05
```

Results




Alternatively, you can map multiple purchasing units to a single business unit using the `PurchasingUnits` field in `BusinessUnit.csv`.

For information on importing business units, see [Accounting Information for Generic ERP Variants](#).

Requirements Reference for Purchasing Unit Features

Available features for implementing purchasing units may require that the visibility control feature is enabled, while others depend on responsible user assignments.

The following table describes the features available and notes whether each feature requires the visibility control feature and responsible user assignments. Before you can use any of the features listed, you must first define purchasing units in the `PurchasingUnit.csv` and then map users to purchasing units through `User.csv`.

Feature	Visibility Control Feature Required?	Responsible User Assignments Required?	Additional Data Mapping Required?	Notes and References
Approvables are routed to users responsible for the approvable's purchasing unit. Users can be responsible for multiple purchasing units.	No	Yes	No	See Making Users Responsible for Multiple Purchasing Units [page 11] .
Supplier choosers are restricted based on purchasing unit of the approvable.	No	No	Yes <code>Supplier.csv</code>	See Filtering Based on Purchasing Units [page 16]
User choosers (such as the On Behalf Of chooser) are restricted based on the purchasing unit of the user.	Yes	Yes	Yes	See Filtering Based on Purchasing Units [page 16]
Account type choosers (PeopleSoft variants only)	No	No	Yes	See Filtering Based on Purchasing Units [page 16]
Search results, manage operations (such as  Manage  Receipts ) and reporting are restricted based on the purchasing units the user is responsible for.	Yes	Yes	No	The behavior depends on the context.

Feature	Visibility Control Feature Required?	Responsible User Assignments Required?	Additional Data Mapping Required?	Notes and References
For responsible users, search results and choosers for approvable and users are limited based on the purchasing units the user is responsible for.	Yes	Yes	No	See Filtering in Search Results, Manage Operations, and Reports [page 25] .
<div style="background-color: #f0f0f0; padding: 10px; border: 1px solid #ccc;"> <p>Note</p> <p>Depending on the type of data, visibility may also apply to purchasing units up the purchasing unit hierarchy, down the hierarchy, or both.</p> </div>				
For requisitions, set up an approval rule to use an approver lookup table (<code>RequisitionLimit.csv</code>) that associates purchasing units with requisition limits and approver groups.	No	No	Yes <code>RequisitionLimit.csv</code>	<code>RequisitionLimit.csv</code> is an approver lookup table. See the RequisitionLimit.csv approver lookup table .
Contracts are filtered based on purchasing unit (if that feature is enabled on your system). (SAP Ariba Customer Support must set the parameter <code>EnablePurchasingUnitBasedAccess</code> .)	Yes	Yes	No	See Purchasing Unit Filtering in Contracts .
Import receiving tolerances specific to purchasing units.	No	No	Yes <code>ReceivingTolerancesByPU.csv</code>	See Configuration of Receiving Tolerance at the Purchasing Unit Level .
For purchase orders, have SAP Ariba Customer Support configure branding specific to purchasing units.	No	No	Yes	Contact SAP Ariba Customer Support.

CSV File Reference for Purchasing Unit Data

Purchasing units can be mapped in master data import files for data segmentation.

Before mapping data to purchasing units, define and import the purchasing units in `PurchasingUnit.csv`. When mapping data to purchasing units, each purchasing unit value you use must match a `UniqueName` value in `PurchasingUnit.csv`.

The name of the field used for purchasing unit information is not the same for every CSV file, so check the Data Dictionary as you create the files.

[SAP Variant Master Data CSV Files \[page 43\]](#)

[PeopleSoft Variant Master Data CSV Files \[page 44\]](#)

[Generic Variant Master Data CSV Files \[page 44\]](#)

SAP Variant Master Data CSV Files

This table lists the SAP variant master data CSV files that can include purchasing unit data.

Table 1: Master Data That Can Be Mapped to Purchasing Units: SAP Variants

Master Data CSV File Name	Can Map to Single or Multiple Purchasing Units	File Column Name for Mapping to Purchasing Unit
<code>BudgetLineItems.csv</code>	Single	<code>ProcurementUnit</code>
<code>CompanyCode.csv</code>	Single	<code>PurchasingUnit</code>
<code>CostCenter.csv</code>	Single	<code>PurchasingUnit</code>
<code>PurchaseGroup.csv</code>	Single	<code>PurchasingUnit</code>
<code>PurchaseOrderConditions.csv</code>	Single	<code>ProcurementUnit</code>
<code>PurchaseOrg.csv</code>	Single	<code>PurchasingUnit</code>
<code>ReceivingTolerancesByPU.csv</code>	Single	<code>ProcurementUnit</code>
<code>ResponsibleUser.csv</code>	Single	<code>PurchasingUnit</code>
<code>Supplier.csv</code>	Multiple	<code>PurchasingUnits</code>
<code>User.csv</code>	Single	<code>PurchasingUnit</code>

Related Information

[CSV File Reference for Purchasing Unit Data \[page 43\]](#)

PeopleSoft Variant Master Data CSV Files

This table lists the PeopleSoft variant master data CSV files that can include purchasing unit data.

Note

The files `Product.csv` and `Project.csv` for PeopleSoft have a `SetID` field, and `SetID.csv` maps to purchasing units.

Table 2: Master Data That Can Be Mapped to Purchasing Units: PeopleSoft Variants

Master Data CSV File Name	Can Map to Single or Multiple Purchasing Units	File Column Name for Mapping to Purchasing Unit
<code>BudgetLineItems.csv</code>	Single	<code>ProcurementUnit</code>
<code>BusinessUnit.csv</code>	Either	<code>PurchasingUnit</code>
<code>Department.csv</code>	Single	<code>PurchasingUnit</code>
<code>ERPCommodityCodeMap.csv</code>	Single	<code>PurchasingUnit</code>
<code>GLBusinessUnit.csv</code>	Single	<code>PurchasingUnit</code>
<code>PurchaseOrderConditions.csv</code>	Single	<code>ProcurementUnit</code>
<code>ReceivingTolerancesByPU.csv</code>	Single	<code>ProcurementUnit</code>
<code>ResponsibleUser.csv</code>	Single	<code>PurchasingUnit</code>
<code>SetID.csv</code>	Single	<code>PurchasingUnit</code>
<code>Supplier.csv</code>	Multiple	<code>PurchasingUnits</code>
<code>User.csv</code>	Single	<code>PurchasingUnit</code>
<code>UserPSfinPull.csv</code>	Single	<code>PurchasingUnit</code>
<code>UserPShrPull.csv</code>	Single	<code>PurchasingUnit</code>

Related Information

[CSV File Reference for Purchasing Unit Data \[page 43\]](#)

Generic Variant Master Data CSV Files

This table lists the Generic variant master data CSV files that can include purchasing unit data.

Note

In `BusinessUnit.csv`, `Company.csv`, and `CostCenter.csv`, if there are values in both the `PurchasingUnit` and `PurchasingUnits` columns at the same time, the result is the combination of both

values. For example, if PurchasingUnit is US001 and PurchasingUnits is "US002,US003", the result is the combined values "US001,US002,US003".

Table 3: Master Data That Can Be Mapped to Purchasing Units: Generic Variants

Master Data CSV File Name	Can Map to Single or Multiple Purchasing Units	File Column Name for Mapping to Purchasing Unit
Account.csv	Multiple	PurchasingUnits
Address.csv	Single	PurchasingUnit
BudgetLineItems.csv	Single	ProcurementUnit
BusinessUnit.csv	Either	PurchasingUnit, PurchasingUnits
Company.csv	Either	PurchasingUnit, PurchasingUnits
CostCenter.csv	Either	PurchasingUnit, PurchasingUnits
ERPCommodityCodeMap.csv	Single	PurchasingUnit
PaymentTerms.csv	Multiple	PurchasingUnits
Product.csv	Multiple	PurchasingUnits
Project.csv	Multiple	PurchasingUnits
PurchaseOrderConditions.csv	Single	ProcurementUnit
ReceivingTolerancesByPU.csv	Single	ProcurementUnit
Region.csv	Single	PurchasingUnit
ResponsibleUser.csv	Single	PurchasingUnit
SubAccount.csv	Multiple	PurchasingUnits
Supplier.csv	Multiple	PurchasingUnits
SupplierLocation.csv	Single	PurchasingUnit
TaxCode.csv	Single	PurchasingUnit
TaxCodeLookup.csv	Single	PurchasingUnit
TaxRateLookupByTaxCode.csv	Single	PurchasingUnit
User.csv	Single	PurchasingUnit
VATDefaults.csv	Single	PurchasingUnit

Related Information

[CSV File Reference for Purchasing Unit Data \[page 43\]](#)

Defaulting Behavior of Purchasing Unit Fields

The value in the **Purchasing Unit** field of an approvable or other object depends on the type of object and the variant of the site (Generic, PeopleSoft, or SAP). Purchasing unit fields have behaviors they default to, called defaulting behavior.

Note

The defaulting behavior is determined by `Application.Approvable.Defaulting.ProcurementUnit` site parameters, which SAP Ariba Support can view. The settings cannot be changed. The parameters do not support user-defined values.

[Defaulting Behavior of Purchasing Unit Fields: Generic Variant \[page 46\]](#)

[PeopleSoft Variants in Purchasing Unit Fields \[page 48\]](#)

[Defaulting Behavior of Purchasing Unit Fields: SAP Variant \[page 51\]](#)

Defaulting Behavior of Purchasing Unit Fields: Generic Variant

The following table shows how the SAP Ariba solution determines the value in the purchasing unit field of different types of objects for Generic variants. In the table, internal field names are included in parentheses.

When multiple fields are listed, the SAP Ariba solution looks for a purchasing unit value in the first field. If the value in the first field is NULL, the system considers the next field, and so on until a purchasing unit value is found.

Object Type	Defaulting Behavior
Charge	The system looks in these fields in the following order until a value is found: <ol style="list-style-type: none">1. The purchasing unit of the order (<code>Order.ProcurementUnit</code>)2. The requester's default accounting entity (<code>Requester.PartitionedUser.Accounting</code>)3. The purchasing unit mapped to the purchasing card assigned to the charge (<code>PCard.ProcurementUnit</code>)
Charge reconciliation	No field specified
Accounting	The system looks in these fields in the following order until a value is found: <ol style="list-style-type: none">1. The purchasing unit mapped to the accounting entity (<code>ProcurementUnit</code>)2. The purchasing unit mapped to the cost center (<code>CostCenter.ProcurementUnit</code>)3. The purchasing unit mapped to the business unit (<code>BusinessUnit.ProcurementUnit</code>)4. The purchasing unit mapped to the company (<code>Company.ProcurementUnit</code>)

Object Type	Defaulting Behavior
User	No field specified
Cart	The requester's default accounting entity (Requester.PartitionedUser.Accounting)
Contract Request	The requester's default accounting entity (Requester.PartitionedUser.Accounting)
ExpenseLineItemCollection (an expense report)	The requester's default accounting entity (Requester.PartitionedUser.Accounting)
Invoice	The system looks in these fields in the following order until a value is found: <ol style="list-style-type: none"> 1. The purchasing unit of the order (Order.ProcurementUnit) 2. The purchasing unit of the contract referenced in the invoice (MasterAgreement.ProcurementUnit) 3. The requester's default accounting entity (Requester.PartitionedUser.Accounting)
Invoice Reconciliation	The purchasing unit of the invoice (Invoice.ProcurementUnit)
Payment	The purchasing unit of the invoice reconciliation (InvoiceReconciliation.ProcurementUnit)
CopyOrder (an ERP order; specific to SAP Ariba Invoice Management)	The system looks in these fields in the following order until a value is found: <ol style="list-style-type: none"> 1. The requester's default accounting entity (Requester.PartitionedUser.Accounting) 2. The default accounting information for the line item (LineItems.Accountings.SplitAccountings) 3. The default accounting information for the requester of the line item (LineItems.Requester.PartitionedUser.Accounting)
Requisition	The requester's default accounting entity (Requester.PartitionedUser.Accounting)
Milestone tracker	The system looks in these fields in the following order until a value is found: <ol style="list-style-type: none"> 1. The purchasing unit of the order (Order.ProcurementUnit) 2. The purchasing unit of the contract referenced in the milestone tracker (MasterAgreement.ProcurementUnit) 3. The requester's default accounting entity (Requester.PartitionedUser.Accounting)
Receipt	The system looks in these fields in the following order until a value is found: <ol style="list-style-type: none"> 1. The purchasing unit of the order (Order.ProcurementUnit) 2. The purchasing unit of the contract referenced in the receipt (MasterAgreement.ProcurementUnit) 3. The requester's default accounting entity (Requester.PartitionedUser.Accounting)

Related Information

[Defaulting Behavior of Purchasing Unit Fields \[page 46\]](#)

PeopleSoft Variants in Purchasing Unit Fields

The following table shows how the SAP Ariba solution determines the value in the purchasing unit field of different types of objects for PeopleSoft variants. In the table, internal field names are included in parentheses.

When multiple fields are listed, the SAP Ariba solution looks for a purchasing unit value in the first field. If the value in the first field is NULL, the system considers the next field, and so on until a purchasing unit value is found.

Object Type	Defaulting Behavior
Charge	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit of the order (<code>Order.ProcurementUnit</code>) 2. The purchasing unit mapped to the business unit of the charge (<code>BusinessUnit.ProcurementUnit</code>) 3. The purchasing unit mapped to the general ledger business unit of the charge (<code>BusinessUnit.GLBusinessUnit.ProcurementUnit</code>) 4. The requester's default accounting entity (<code>Requester.PartitionedUser</code>) 5. The purchasing unit mapped to the purchasing card assigned to the charge (<code>PCard.ProcurementUnit</code>)
Charge reconciliation	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit of the order (<code>Order.ProcurementUnit</code>) 2. The purchasing unit mapped to the business unit of the charge reconciliation (<code>BusinessUnit.ProcurementUnit</code>) 3. The purchasing unit mapped to the general ledger business unit of the charge reconciliation (<code>BusinessUnit.GLBusinessUnit.ProcurementUnit</code>) 4. The requester's default accounting entity (<code>Requester.PartitionedUser</code>) 5. The purchasing unit of the charge (<code>Charge.ProcurementUnit</code>)
Accounting	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit mapped to the accounting entity (<code>ProcurementUnit</code>) 2. The purchasing unit mapped to the department of the accounting entity (<code>Department.ProcurementUnit</code>) 3. The purchasing unit mapped to the business unit of the accounting entity (<code>BusinessUnit.ProcurementUnit</code>) 4. The purchasing unit mapped to the general ledger business unit of the business unit of the accounting entity (<code>BusinessUnit.GLBusinessUnit.ProcurementUnit</code>) 5. The purchasing unit mapped to the general ledger business unit of the accounting entity (<code>GLBusinessUnit.ProcurementUnit</code>)

Object Type	Defaulting Behavior
User	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit mapped to the user's default accounting entity (<code>Accounting.ProcurementUnit</code>) 2. The purchasing unit mapped to the user's business unit (<code>BusinessUnit.ProcurementUnit</code>) 3. The purchasing unit mapped to the business unit of the user's general ledger business unit (<code>BusinessUnit.GLBusinessUnit.ProcurementUnit</code>) 4. The purchasing unit mapped to the user's general ledger business unit (<code>GLBusinessUnit.ProcurementUnit</code>) 5. The purchasing unit mapped to the department of the user's default accounting entity (<code>Accounting.Department.ProcurementUnit</code>)
Cart	No field specified
Contract Request	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit mapped to the business unit referenced in the contract request (<code>BusinessUnit.ProcurementUnit</code>) 2. The purchasing unit mapped to the general ledger business unit of the business unit referenced in the contract request (<code>BusinessUnit.GLBusinessUnit.ProcurementUnit</code>) 3. The requester's default accounting entity (<code>Requester.PartitionedUser</code>)
ExpenseLineItemCollection (an expense report)	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit mapped to the general ledger business unit referenced in the expense report (<code>GLBusinessUnit.ProcurementUnit</code>) 2. The requester's default accounting entity (<code>Requester.PartitionedUser</code>)
Invoice	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit of the order (<code>Order.ProcurementUnit</code>) 2. The purchasing unit of the contract referenced in the invoice (<code>MasterAgreement.ProcurementUnit</code>) 3. The purchasing unit mapped to the business unit referenced in the invoice (<code>BusinessUnit.ProcurementUnit</code>) 4. The purchasing unit mapped to the general ledger business unit of the business unit referenced in the invoice (<code>BusinessUnit.GLBusinessUnit.ProcurementUnit</code>) 5. The requester's default accounting entity (<code>Requester.PartitionedUser</code>)
Invoice Reconciliation	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit mapped to the business unit referenced in the invoice reconciliation (<code>BusinessUnit.ProcurementUnit</code>) 2. The purchasing unit mapped to the general ledger business unit of the business unit referenced in the invoice reconciliation (<code>BusinessUnit.GLBusinessUnit.ProcurementUnit</code>) 3. The requester's default accounting entity (<code>Requester.PartitionedUser</code>) 4. The purchasing unit of the invoice (<code>Invoice.ProcurementUnit</code>)

Object Type	Defaulting Behavior
Payment	The purchasing unit of the invoice reconciliation (<code>InvoiceReconciliation.ProcurementUnit</code>)
CopyOrder (an ERP order; specific to SAP Ariba Invoice Management)	The system looks in these fields in the following order until a value is found: <ol style="list-style-type: none"> 1. The purchasing unit mapped to the business unit referenced in the ERP order (<code>BusinessUnit.ProcurementUnit</code>) 2. The purchasing unit mapped to the general ledger business unit of the business unit referenced in the ERP order (<code>BusinessUnit.GLBusinessUnit.ProcurementUnit</code>) 3. The requester's default accounting entity (<code>Requester.PartitionedUser</code>) 4. The default accounting information for the line item (<code>LineItems.Accountings.SplitAccountings</code>) 5. The default accounting information for the requester of the line item (<code>LineItems.Requester.PartitionedUser</code>)
Requisition	The system looks in these fields in the following order until a value is found: <ol style="list-style-type: none"> 1. The purchasing unit mapped to the business unit referenced in the requisition (<code>BusinessUnit.ProcurementUnit</code>) 2. The purchasing unit mapped to the general ledger business unit of the business unit referenced in the requisition (<code>BusinessUnit.GLBusinessUnit.ProcurementUnit</code>) 3. The requester's default accounting entity (<code>Requester.PartitionedUser</code>)
Milestone tracker	The system looks in these fields in the following order until a value is found: <ol style="list-style-type: none"> 1. The purchasing unit of the order (<code>Order.ProcurementUnit</code>) 2. The purchasing unit of the contract referenced in the milestone tracker (<code>MasterAgreement.ProcurementUnit</code>) 3. The requester's default accounting entity (<code>Requester.PartitionedUser.Accounting</code>)
Receipt	The system looks in these fields in the following order until a value is found: <ol style="list-style-type: none"> 1. The purchasing unit of the order (<code>Order.ProcurementUnit</code>) 2. The purchasing unit of the contract referenced in the receipt (<code>MasterAgreement.ProcurementUnit</code>) 3. The requester's default accounting entity (<code>Requester.PartitionedUser.Accounting</code>)

Related Information

[Defaulting Behavior of Purchasing Unit Fields \[page 46\]](#)

Defaulting Behavior of Purchasing Unit Fields: SAP Variant

The following table shows how the SAP Ariba solution determines the value in the purchasing unit field of different types of objects for SAP variants. In the table, internal field names are included in parentheses.

When multiple fields are listed, the SAP Ariba solution looks for a purchasing unit value in the first field. If the value in the first field is NULL, the system considers the next field, and so on until a purchasing unit value is found.

Object Type	Defaulting Behavior
Charge	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit of the order (<code>Order.ProcurementUnit</code>) 2. The purchasing unit mapped to the purchase organization referenced in the charge (<code>PurchaseOrg.ProcurementUnit</code>) 3. The purchasing unit mapped to the company code of the purchase organization referenced in the charge (<code>PurchaseOrg.CompanyCode.ProcurementUnit</code>) 4. The purchasing unit mapped to the company code referenced in the charge (<code>CompanyCode.ProcurementUnit</code>) 5. The requester's default accounting entity (<code>Requester.PartitionedUser</code>) 6. The purchasing unit mapped to the purchasing card assigned to the charge (<code>PCard.ProcurementUnit</code>)
Charge reconciliation	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit of the order (<code>Order.ProcurementUnit</code>) 2. The purchasing unit mapped to the purchase organization referenced in the charge (<code>PurchaseOrg.ProcurementUnit</code>) 3. The purchasing unit mapped to the company code of the purchase organization referenced in the charge (<code>PurchaseOrg.CompanyCode.ProcurementUnit</code>) 4. The purchasing unit mapped to the company code referenced in the charge (<code>CompanyCode.ProcurementUnit</code>) 5. The requester's default accounting entity (<code>Requester.PartitionedUser</code>) 6. The purchasing unit of the charge (<code>Charge.ProcurementUnit</code>)
Accounting	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit mapped to the accounting entity (<code>ProcurementUnit</code>) 2. The purchasing unit mapped to the cost center of the accounting object (<code>CostCenter.ProcurementUnit</code>) 3. The purchasing unit mapped to the company code of the cost center of the accounting object (<code>CostCenter.CompanyCode.ProcurementUnit</code>)

Object Type	Defaulting Behavior
User	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit mapped to the user's default accounting entity (<code>Accounting.ProcurementUnit</code>) 2. The purchasing unit mapped to the user's purchase group (<code>PurchaseGroup.ProcurementUnit</code>) 3. The purchasing unit mapped to the user's purchase organization (<code>PurchaseOrg.ProcurementUnit</code>) 4. The purchasing unit mapped to the company code of the user's purchase organization (<code>PurchaseOrg.CompanyCode.ProcurementUnit</code>) 5. The purchasing unit mapped to the user's company code (<code>CompanyCode.ProcurementUnit</code>) 6. The purchasing unit mapped to the cost center of the user's default accounting entity (<code>Accounting.CostCenter.ProcurementUnit</code>)
Cart	No field specified
Contract Request	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit mapped to the purchase organization referenced in the contract request (<code>PurchaseOrg.ProcurementUnit</code>) 2. The purchasing unit mapped to the company code of the purchase organization referenced in the contract request (<code>PurchaseOrg.CompanyCode.ProcurementUnit</code>) 3. The purchasing unit mapped to the company code referenced in the contract request (<code>CompanyCode.ProcurementUnit</code>) 4. The requester's default accounting entity (<code>Requester.PartitionedUser</code>)
ExpenseLineItemCollection (an expense report)	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit mapped to the company code referenced in the expense report (<code>CompanyCode.ProcurementUnit</code>) 2. The requester's default accounting entity (<code>Requester.PartitionedUser</code>)
Invoice	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit of the order (<code>Order.ProcurementUnit</code>) 2. The purchasing unit of the contract referenced in the invoice (<code>MasterAgreement.ProcurementUnit</code>) 3. The purchasing unit mapped to the purchase organization referenced in the invoice (<code>PurchaseOrg.ProcurementUnit</code>) 4. The purchasing unit mapped to the company code of the purchase organization referenced in the invoice (<code>PurchaseOrg.CompanyCode.ProcurementUnit</code>) 5. The purchasing unit mapped to the company code referenced in the invoice (<code>CompanyCode.ProcurementUnit</code>) 6. The requester's default accounting entity (<code>Requester.PartitionedUser</code>)

Object Type	Defaulting Behavior
Invoice Reconciliation	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit mapped to the purchase organization referenced in the invoice reconciliation (<code>PurchaseOrg.ProcurementUnit</code>) 2. The purchasing unit mapped to the company code of the purchase organization referenced in the invoice reconciliation (<code>PurchaseOrg.CompanyCode.ProcurementUnit</code>) 3. The purchasing unit mapped to the company code referenced in the invoice reconciliation (<code>CompanyCode.ProcurementUnit</code>) 4. The requester's default accounting entity (<code>Requester.PartitionedUser</code>) 5. The purchasing unit of the invoice (<code>Invoice.ProcurementUnit</code>)
Payment	<p>The purchasing unit of the invoice reconciliation (<code>InvoiceReconciliation.ProcurementUnit</code>)</p>
CopyOrder (an ERP order; specific to SAP Ariba Invoice Management)	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit mapped to the company code referenced in the ERP order (<code>CompanyCode.ProcurementUnit</code>) 2. The requester's default accounting entity (<code>Requester.PartitionedUser</code>) 3. The default accounting information for the line item (<code>LineItems.Accountings.SplitAccountings</code>) 4. The default accounting information for the requester of the line item (<code>LineItems.Requester.PartitionedUser</code>)
Requisition	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit mapped to the company code referenced in the requisition (<code>CompanyCode.ProcurementUnit</code>) 2. The requester's default accounting entity (<code>Requester.PartitionedUser</code>)
Milestone tracker	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit of the order (<code>Order.ProcurementUnit</code>) 2. The purchasing unit of the contract referenced in the milestone tracker (<code>MasterAgreement.ProcurementUnit</code>) 3. The requester's default accounting entity (<code>Requester.PartitionedUser.Accounting</code>)
Receipt	<p>The system looks in these fields in the following order until a value is found:</p> <ol style="list-style-type: none"> 1. The purchasing unit of the order (<code>Order.ProcurementUnit</code>) 2. The purchasing unit of the contract referenced in the receipt (<code>MasterAgreement.ProcurementUnit</code>) 3. The requester's default accounting entity (<code>Requester.PartitionedUser.Accounting</code>)

Related Information

[Defaulting Behavior of Purchasing Unit Fields \[page 46\]](#)

Purchasing Units vs. multi-ERP Configurations

In addition to purchasing units, SAP Ariba provides an advanced system implementation called multi-ERP to fully support data segmentation for customers with multiple ERP systems, each with a separate chart of accounts.

SAP Ariba sites that support multi-ERP configurations enable organizations to integrate multiple procurement or invoicing solution sites in a way that allows enterprise-wide data to be shared throughout the organization while site-specific and transactional data remains separate. Each site can be associated with a separate enterprise resource planning (ERP) system.

Note

If a customer has different companies rather than various entities inside a company, SAP recommends using the multi-ERP configuration. To establish a multi-ERP setup, multiple sites are necessary instead of multiple purchasing units within a single site.

The following table lists some differences between a multi-ERP configuration with multiple sites and a single site with purchasing units.

Question	Purchasing Units	Sites in a multi-ERP Configuration
Where is the master data and transactional data stored?	All data is stored in the same site.	Enterprise-wide master data is loaded in a parent site and automatically replicated to child sites. Transactional data and site-specific master data is stored in child sites.
Are there any chart of account (COA) restrictions?	Yes. The entire organization shares the same COA.	No. Each business unit can have its own COA.
Can master data be filtered by business unit?	No, only some master data is filtered.	Yes, master data specific to one business unit is completely filtered because it exists in its own site.
Is it possible for users to have access to data across multiple accounting units (business units, companies, or cost centers)?	Yes, in Generic variants. The administrative cost can be high because each valid purchasing unit must be included in the purchasing unit field (separated by commas).	Yes, if each business unit, company, or cost center corresponds to a child site, a user can have access to multiple sites and switch between them easily.
Can searches by purchasing managers be restricted to their own business unit?	Yes, purchasing managers can be restricted to seeing data for purchasing units where they are included as a responsible user only.	Yes, purchasing managers can see only the data in sites they have access to.
Can purchasing units be used in a multi-ERP configuration?	Not applicable.	Yes, purchasing units provide a way to filter data within a site.
Can the solution handle more than one ERP system?	No. A purchasing unit solution is limited to companies with a single ERP system.	Yes.



For information about multi-ERP configurations, see the [Multi-ERP Configuration Guide](#).

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