SAP Ariba

PROCUREMENT SERVICES DIVISION »

PSD – Contract User Training

Ariba P2P
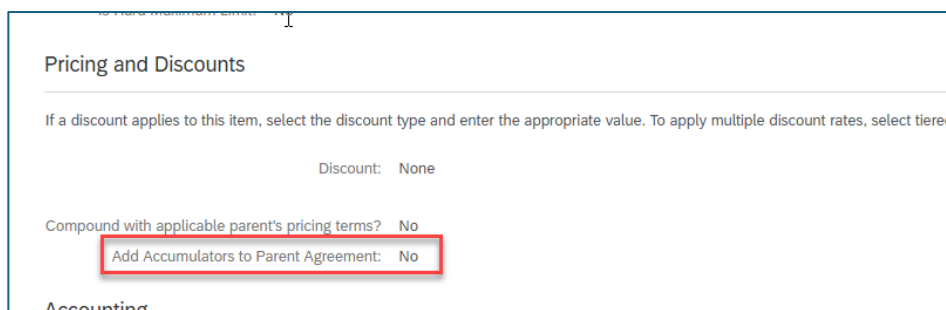***How to update accumulators on Child Contract via upload***

The purpose of this job aid is to show how to complete a mass update of pricing term accumulators in an Ariba Child Contract.

Background:

There is a radio selection titled "**Add Accumulators to Parent Agreement**" in Ariba's Child Contracts (also known as sub-agreements). The purpose of this field is to transfer the contract spend of Child Contracts up to the Parent Contract for accurate tracking of released values and available capacity.

This field should be marked as 'yes' for all migrated and new Child Contracts. If a Child Contract is published without this setting marked as yes, an amendment must be created to update the field.
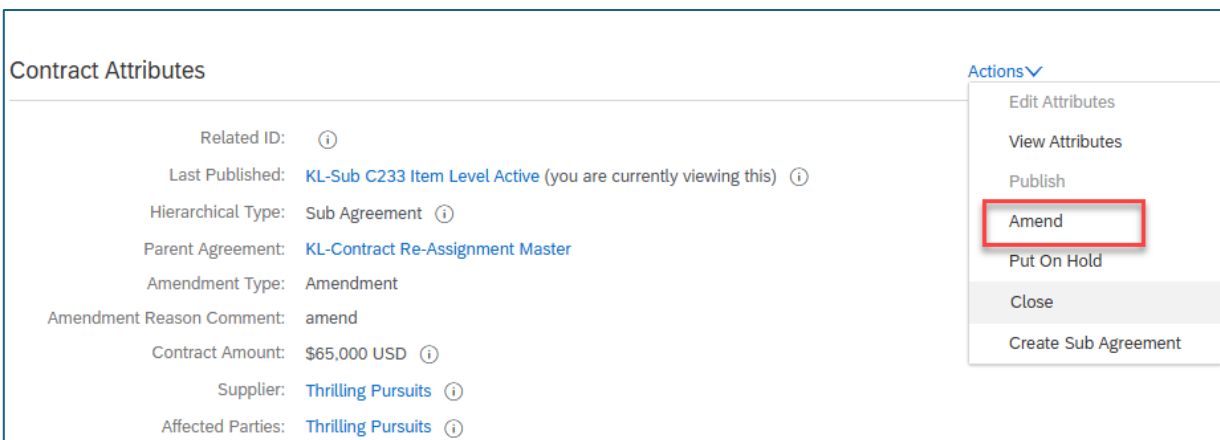
This field exists within each Pricing Term. In Ariba, there is an excel upload feature that can speed up the process for contracts with multiple lines.
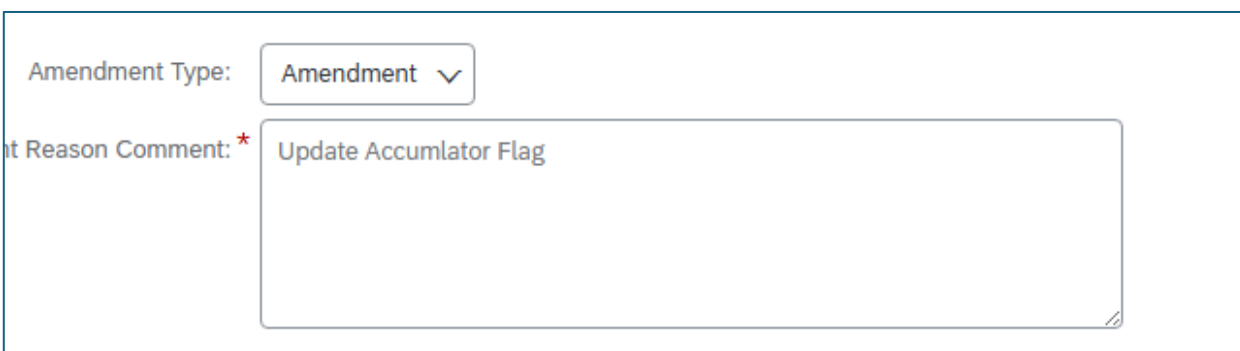
1

To begin making the required changes, you will need to amend the contract. Search and select the **Contract Workspace** for the Child/Sub-Agreement you need to update. Scroll down to the '**Contract Attributes**' section and click the downward arrow next to '**Actions**'. Click '**Amend**'
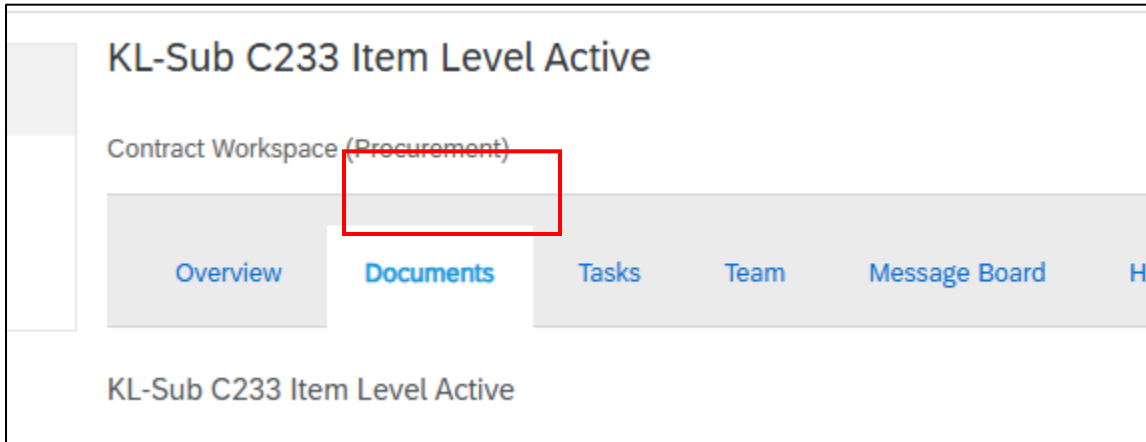

2

In the '**Amendment Type**' drop down, select '**Amendment**'. Enter the amendment reason in the '**Comment**' field.
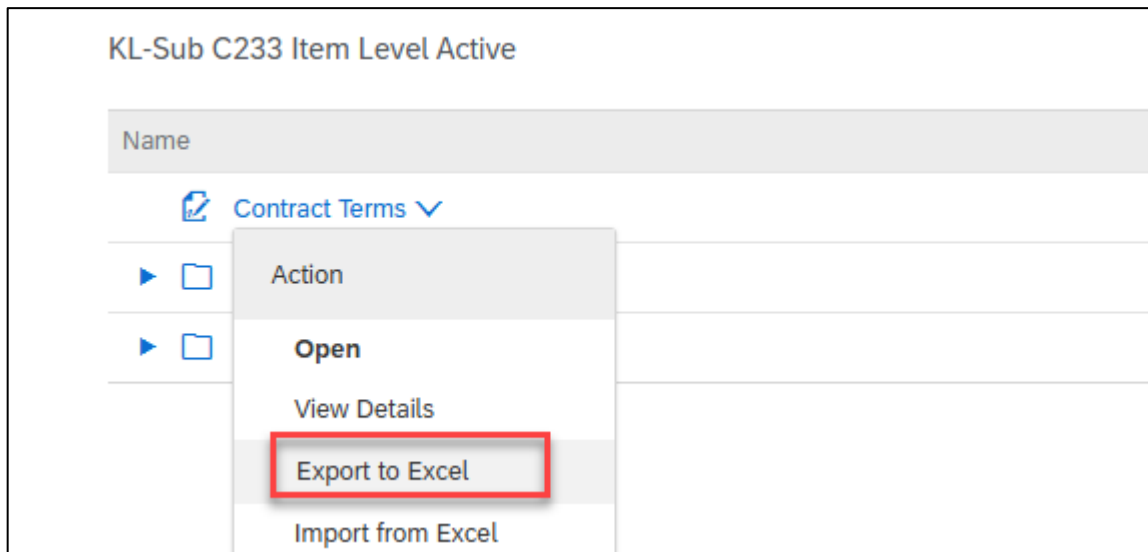
3

We'll begin by downloading the current contract terms to an Excel file. While still in the Contract Workspace, click the '**Documents**' tab.
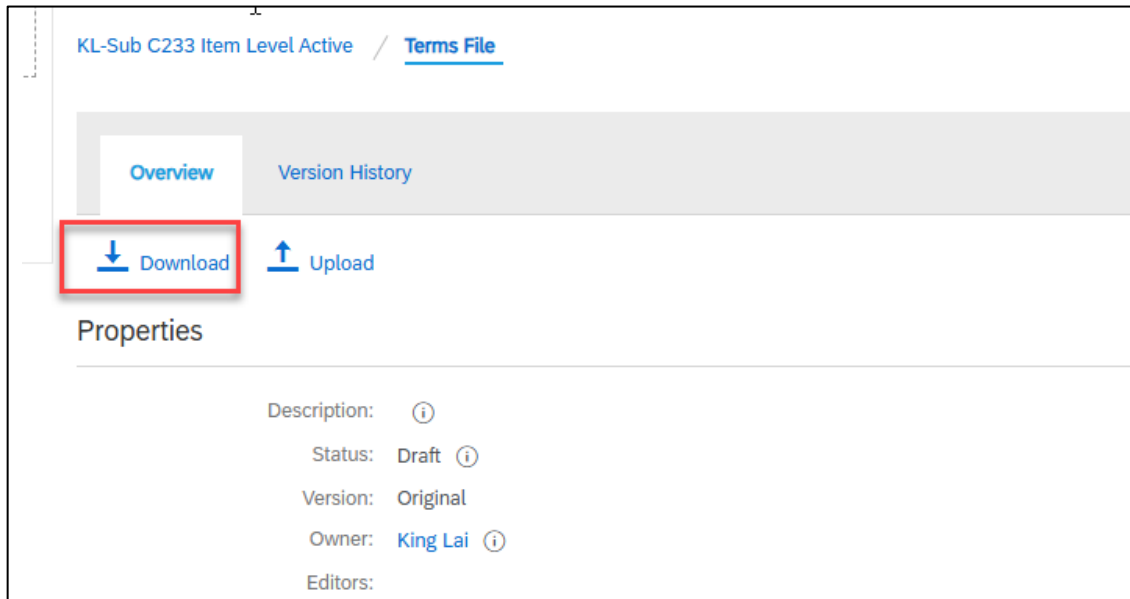

4

Click the dropdown menu next to '**Contract Terms**', then select '**Export to Excel**'.
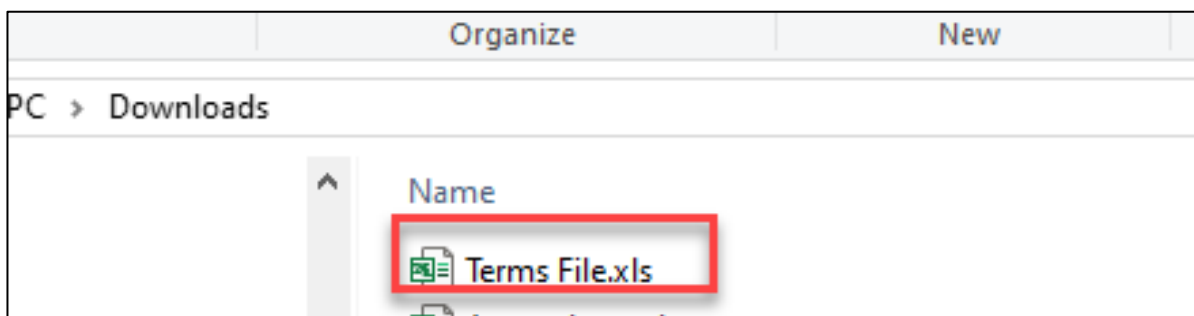
5

From the Terms File '**Overview**' tab, click '**Download**'

6

The terms file can now be opened from your computer's download folder. Note: the file name may have changed if you already have another file with the same name.
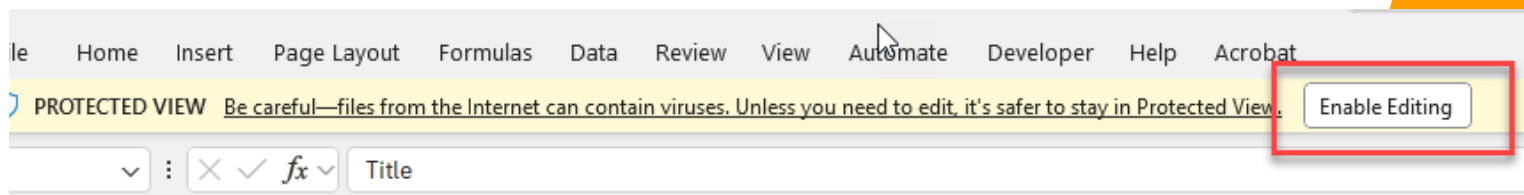
7

Important: Always make a .xls copy of the file and work on the copy. This way if an error occurs, you can restore the contract with the original version. To do this, open the file from your downloads to '**Save As**' and rename the file. Ensure you are saving it as an '.xls' not an '.xlsx'. It's recommended to save the file you use for edits with 'working copy' in the file name, and save a copy of the 'original' as well.

8

Double click and open the working copy of your terms file. Then, click 'Enable Editing' at the top.

| le | Home | Insert | Page Layout | Formulas | Data | Review | View | Automate | Developer | Help | Acrobat |

PROTECTED VIEW   Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. | Enable Editing |

fx   Title

9

If you are not already in the '**Contract Header**' tab of the file, select this tab from the bottom of your Excel window.
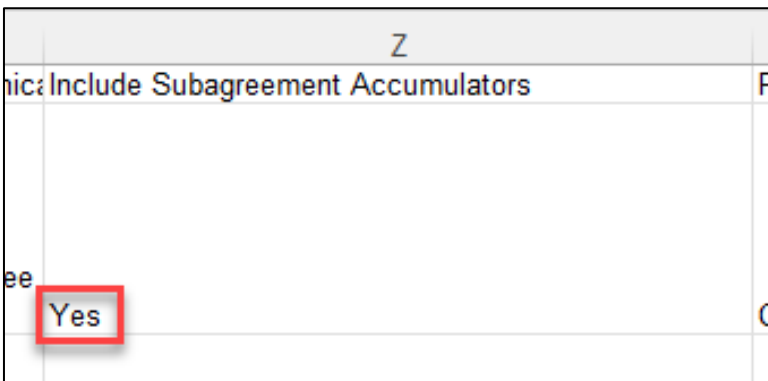
Contract Header

9

If you are not already in the '**Contract Header**' tab of the file, select this tab from the bottom of your Excel window.

10

Find the column titled **'Include Subagreement Accumulators'** and ensure it states '**Yes**'.

11

Find the column titled **'Accumulate Non Catalogs Against Contract'** and ensure it states '**Yes**'.

12

Navigate to the bottom of your Excel window and select the '**Contract Item Information**' tab.

13

Find the column titled **'Add Accumulators to Parent Agreement'** and ensure it states '**Yes**' for all lines.
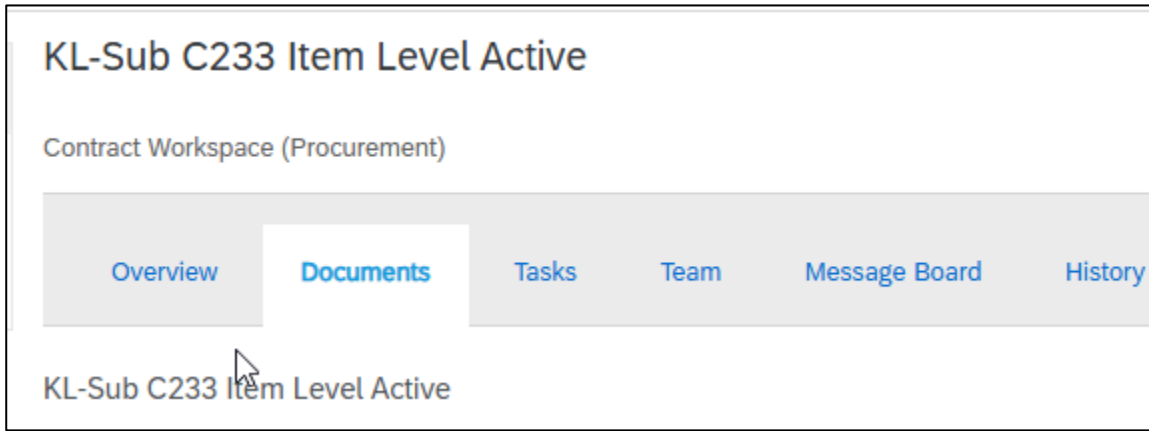

14

Once you have updated the fields in the previous steps, **save** the working file.

Note: Do not edit any other fields. Doing so may corrupt the contract once uploaded which cannot be restored.
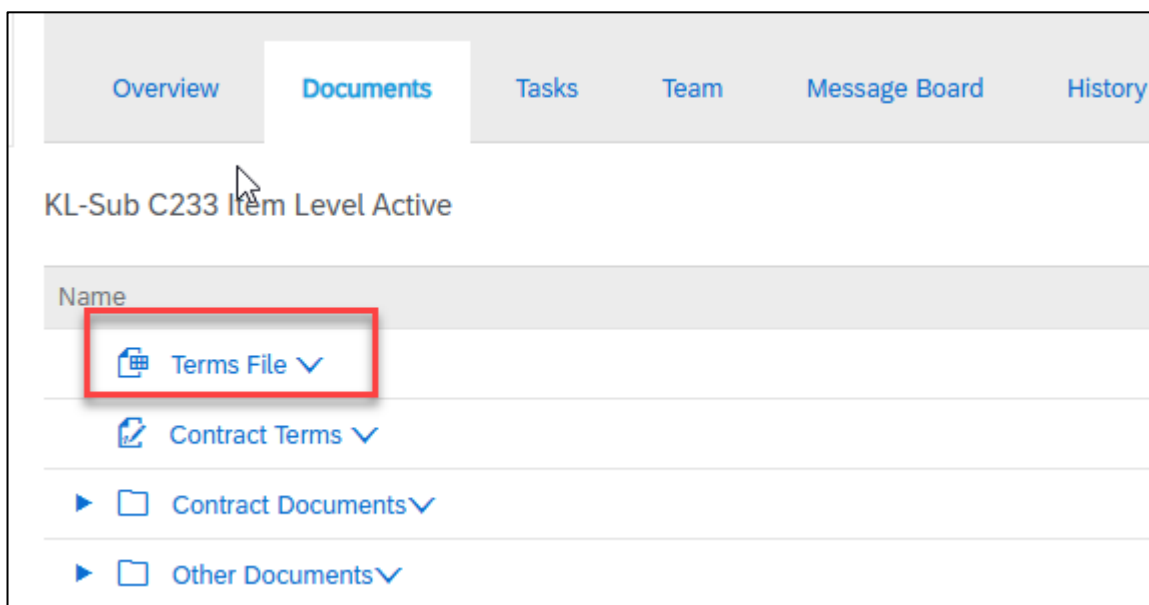
15

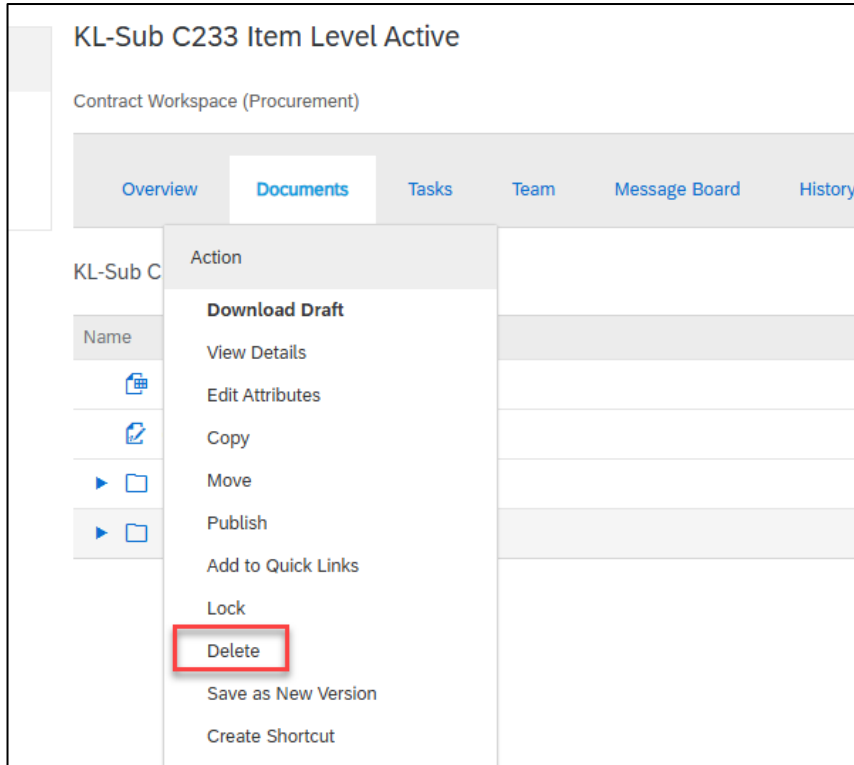Return to the **Contract Workspace** in Ariba.
Select the 'Documents' tab.

KL-Sub C233 Item Level Active

Contract Workspace (Procurement)

| Overview | Documents | Tasks | Team | Message Board | History |

KL-Sub C233 Item Level Active

16

From the Contract Workspace Documents tab,
click the '**Terms File**' dropdown.

| Overview | Documents | Tasks | Team | Message Board | History |

KL-Sub C233 Item Level Active

Name

⊞ Terms File ⌄

✎ Contract Terms ⌄

▶ ☐ Contract Documents⌄

▶ ☐ Other Documents⌄

17

In the Terms File dropdown menu, click '**Delete**'.

KL-Sub C233 Item Level Active

Contract Workspace (Procurement)

| Overview | Documents | Tasks | Team | Message Board | History |

KL-Sub C

Action

Name

Download Draft

View Details

Edit Attributes

Copy

Move

Publish

Add to Quick Links

Lock

Delete

Save as New Version

Create Shortcut

18

Confirm you are deleting the correct file, and then click '**OK**'

Deleting 'Terms File.xls

OK

are about to delete this **Document** and its associated **Shortcuts**. To confirm the deletion of this document and its shortcuts, click **OK**. If you do not want to delete the document listed and its shortcuts, click **Cancel**.

Description:
Status: Draft
Version: Original
Owner: King Lai
Editors:
Use As: Contract Content
Base Language: English
Last Modified: 04/25/2025
Creation Date: 04/25/2025
Access Control: (No additional restrictions)
Is Publish Required: No

OK

From the Contract Workspace '**Documents**' tab, click the '**Contract Terms**' dropdown, and then select '**Import from Excel**' from the menu.

20

Click 'Choose File' to navigate to your working terms file that you saved after making changes. You may also drag and drop the file from your file explorer into the dotted rectangle.

21
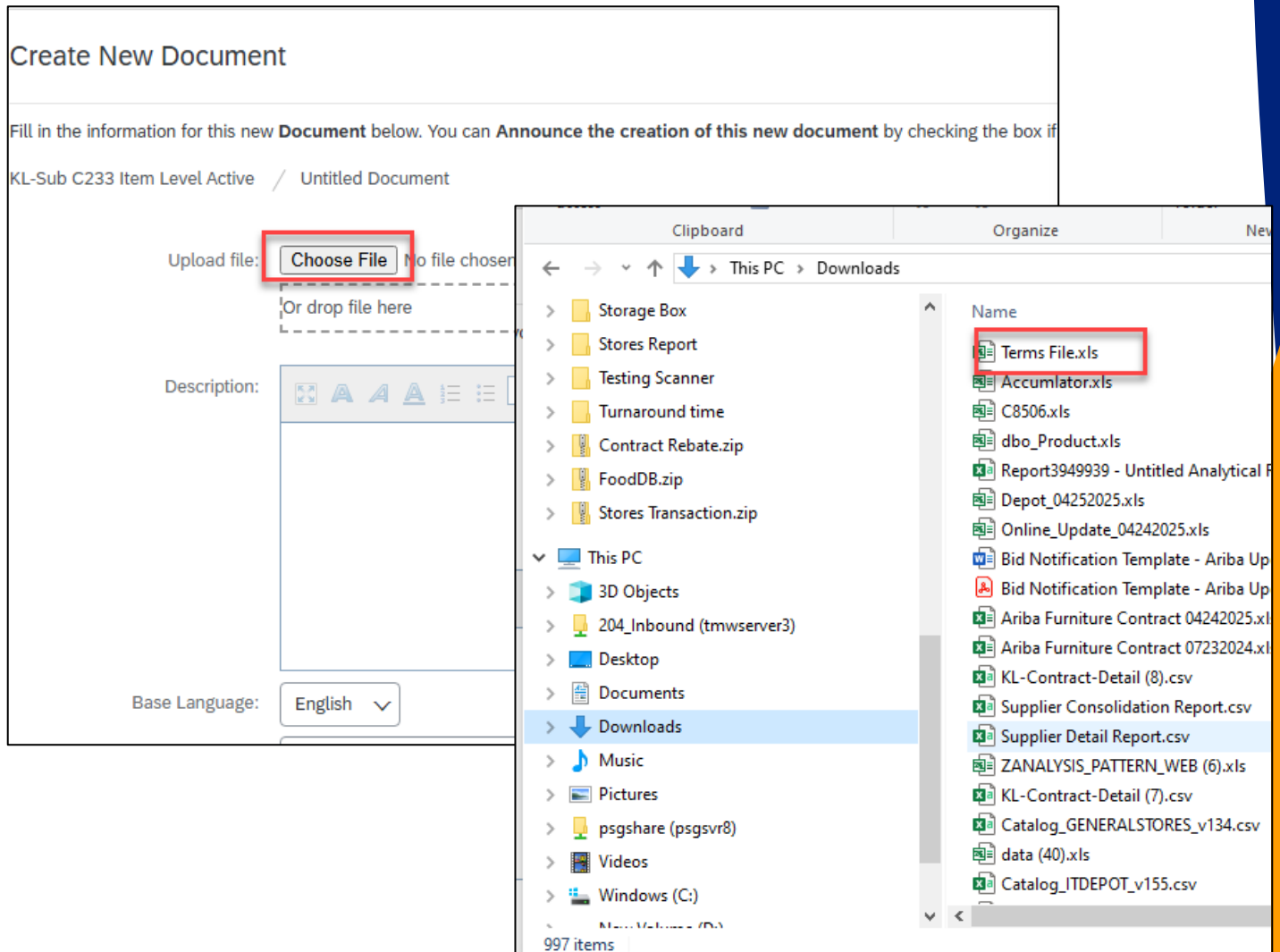
You may optionally add a **Title** and **Description** for your upload.

Important: be sure the selection in the '**Use As**' field is set to '**None**'. Then click '**Import**'.
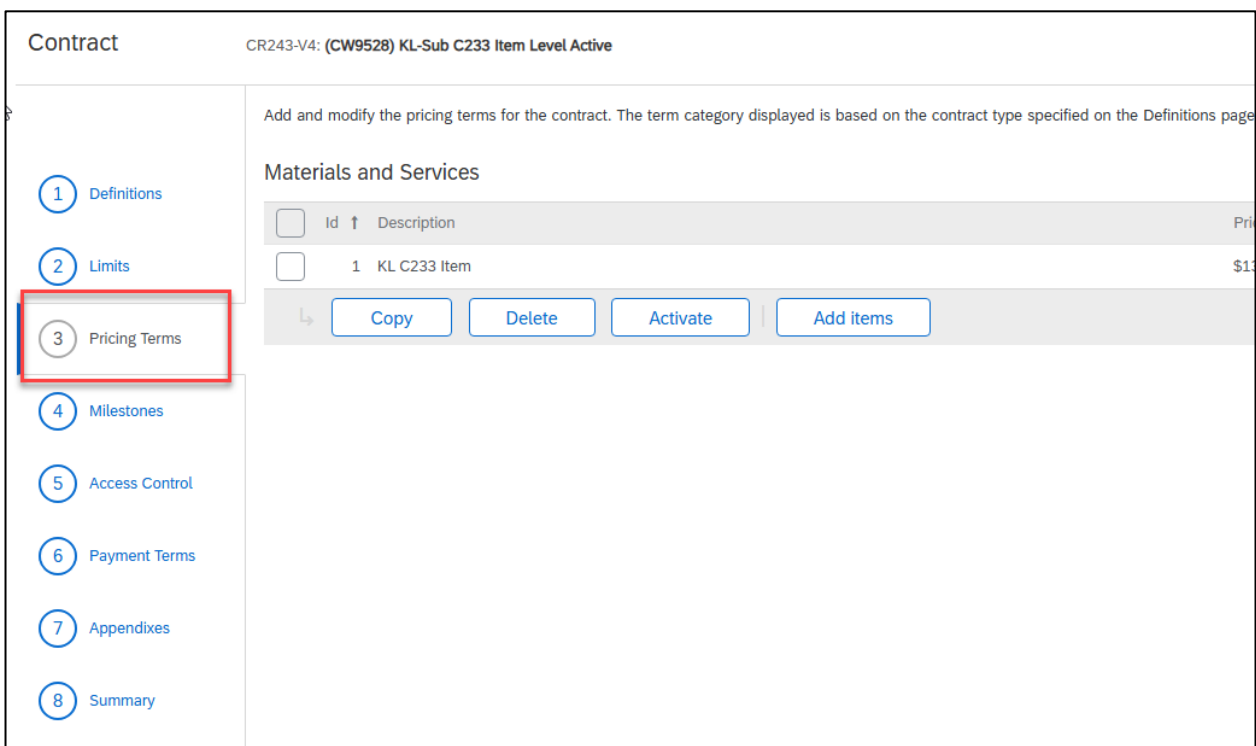
21

In the '**Confirm Import**' window that opens, click '**OK**'
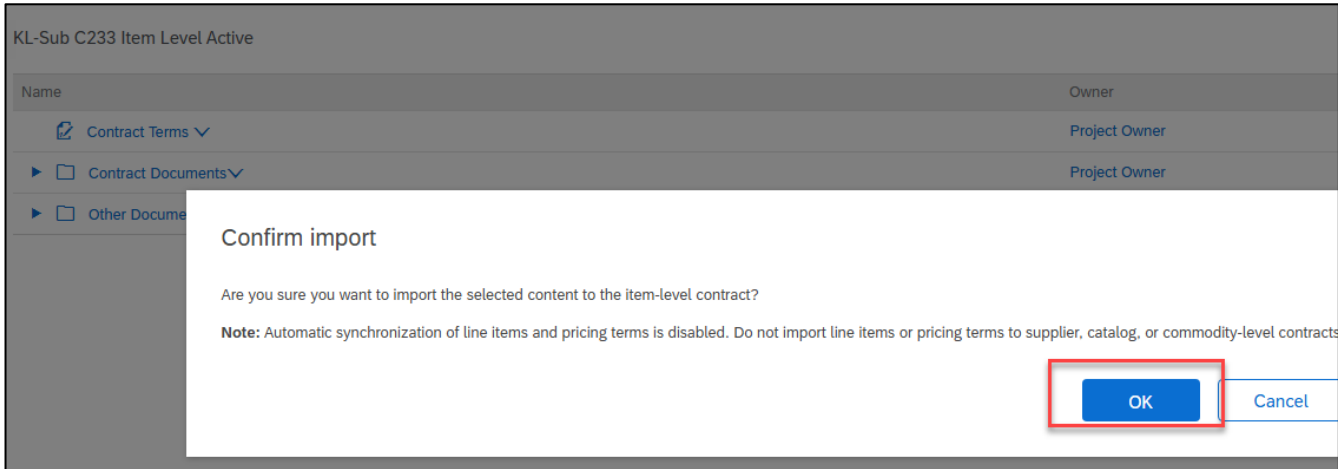
22

Select the '**Pricing Terms**' section from the actions menu on the left.

23

Click the '**Edit**' button to the right of the pricing term line.

24

Check under '**Pricing and Discounts**' to confirm that '**Add Accumulators to Parent Agreement**' radio button is set to **yes**.

25

Click '**OK**' to exit the Pricing Terms.

26

Click '**Next**' until you have the option to save.

27

The contract is now ready to publish. Navigate to the Contract Workspace, scroll to the '**Actions**' dropdown. Click '**Publish**' from the dropdown menu.

28

If purchase orders were issued against the **Child Contract/Subagreement(s)** before the accumulator was set up, it's best practice to amend the **Parent/Master contract** to edit the '**Preload amount**' so the release and available values are accurate for reporting.

To do so, please review the job aid titled 'How to Amend a Contract to Update the Preload Amount'.