



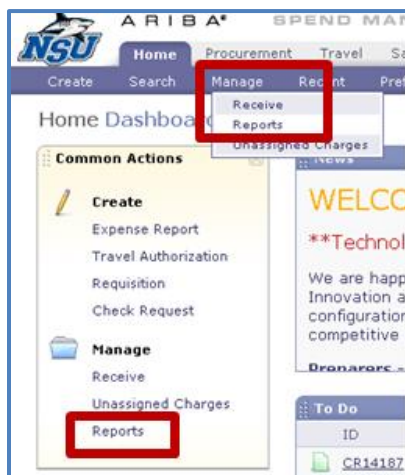
ARIBA: Reporting and Searching

Introduction

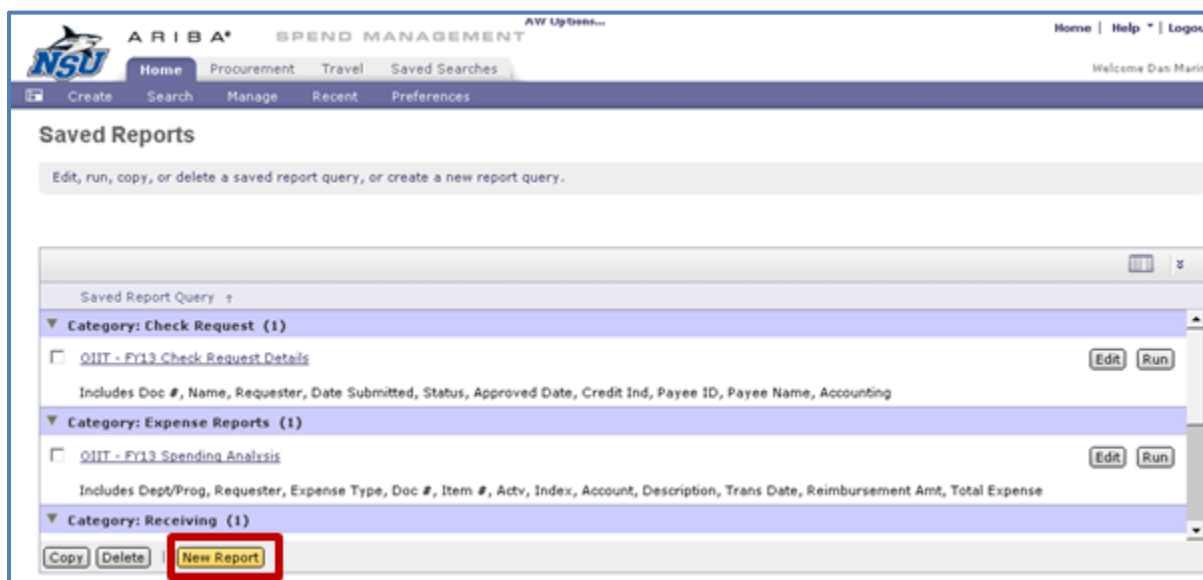
Ariba's Reporting Module and Search Interface can be useful tools for document tracking and spend analysis. Reports are best used for viewing large document sets and aggregating data, whereas searches can be helpful when monitoring small document sets or trying to obtain very detailed information. It is important to keep in mind that data access varies between these two facilities. Center-specific reports include ALL documents charged to a particular center's Activity code, while searches return only documents created, approved, or watched by the current user.

Building and Running Reports

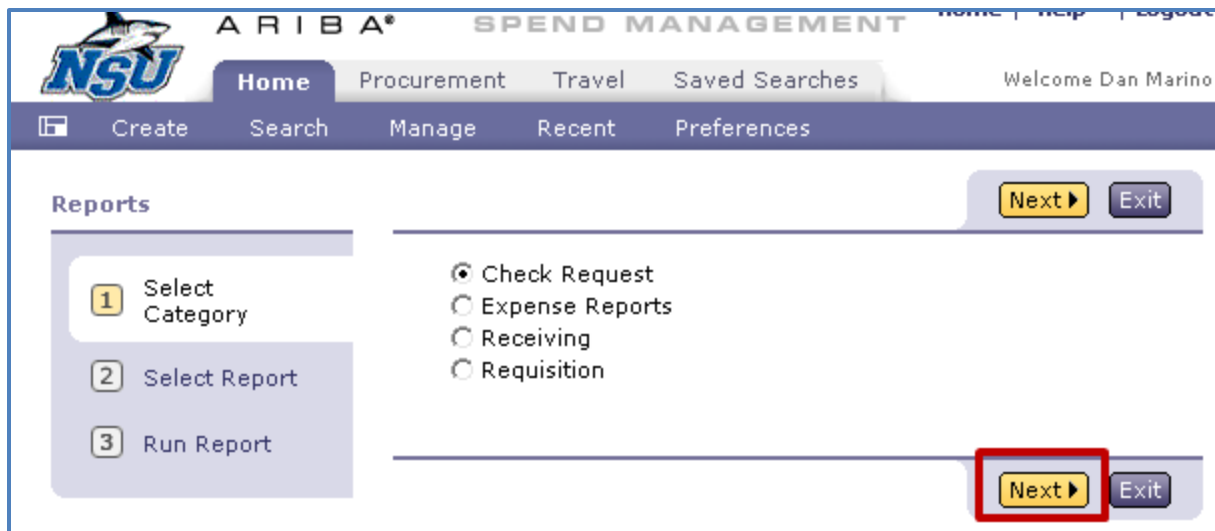
The reporting module can be accessed either via the "Common Actions" widget or the "Manage -> Reports" menu option:



If you have saved reports, they will be presented to you. Click "New Report" to create a new report:



Choose a report category and click “Next”:



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Reports

1 Select Category
 2 Select Report
 3 Run Report

☒ Check Request
☐ Expense Reports
☐ Receiving
☐ Requisition

[Next ▶](#) [Exit](#)

Select a report and click “Next”:



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Reports

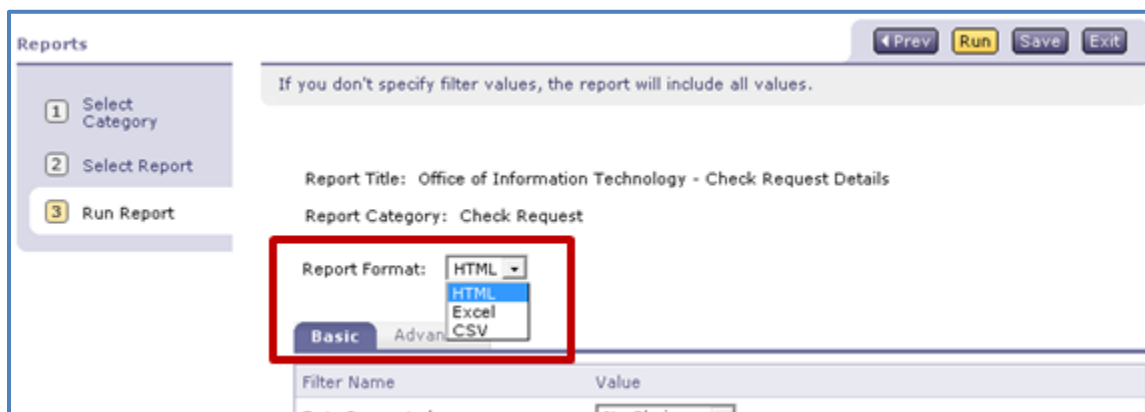
1 Select Category
 2 Select Report
 3 Run Report

If you don't see the report you need, return to the previous screen and select a different category. ...

☒ Office of Information Technology - Approval Times for Check Requests
 Office of Information Technology - Find how long it took each Approval Group/Individual to approve each Check Request
☐ Office of Information Technology - Check Request Details
 Check Request Details Report
☐ Office of Information Technology - Check Requests Pending Approval
 Office of Information Technology - Find Check Requests pending approval by approval groups

[Prev](#) [Next ▶](#) [Exit](#)

Choose a report format (HTML, Excel, or CSV):



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Reports

1 Select Category
 2 Select Report
 3 Run Report

If you don't specify filter values, the report will include all values.

Report Title: Office of Information Technology - Check Request Details
 Report Category: Check Request

Report Format: **HTML**
 HTML
 Excel
 CSV

[Basic](#) [Advanced](#)

Filter Name Value
 Date Requested: No Choice



Apply desired filters to restrict report result set:

1 Select Category

2 Select Report

3 Run Report

If you don't specify filter values, the report will include all values.

Report Title: Office of Information Technology - Check Request Details

Report Category: Check Request

Report Format: HTML

Basic

Advanced

Filter Name	Value
Date Requested:	No Choice
Date Submitted:	No Choice
Needed Date:	No Choice
Status:	No Choice
Is this a new vendor?	No Choice
Is this an independent contractor?	No Choice
Is this a credit?	No Choice
Vendor Invoice Date:	No Choice
Amount:	No Choice
Activity Code:	No Choice

Tailor report columns:

1 Select Category

2 Select Report

3 Run Report

If you don't specify filter values, the report will include all values.

Report Title: Office of Information Technology - Check Request Details

Report Category: Check Request

Report Format: HTML

Basic

Advanced

Name	Display	Filter	Value
Account:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(select a value) [select]
Account:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Activity Code:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(select a value) [select]
Activity Code:	<input type="checkbox"/>	<input type="checkbox"/>	
Address Seq. #:	<input type="checkbox"/>	<input type="checkbox"/>	
Address:	<input type="checkbox"/>	<input type="checkbox"/>	
Approved Date:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No Choice
Approvers List:	<input type="checkbox"/>	<input type="checkbox"/>	
CR #:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Credit?:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	



Click “Save” if you would like to be able to run this report with the provided parameters again in the future. A dialog box will appear for you to give the saved report a title and description:

A dialog box titled "Save Report Query" with a close button (X) in the top right corner. It contains two text input fields. The first field is labeled "Save Report Query as:" and contains the text "Office of Information Technology - Check Request Details - 1 Jun". The second field is labeled "Description:" and is currently empty. At the bottom right of the dialog are two buttons: "OK" and "Cancel".

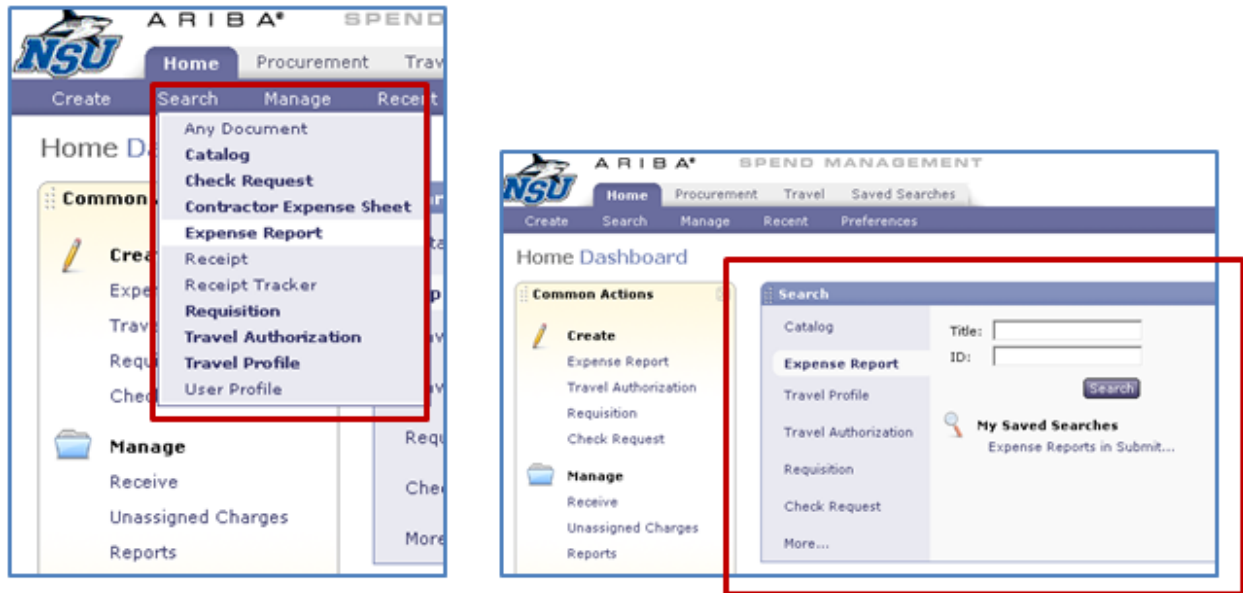
Click either “Run” to run the report or Exit to return to your dashboard.

The next time that you access the reporting module, you will be presented with the option to run your newly saved report:

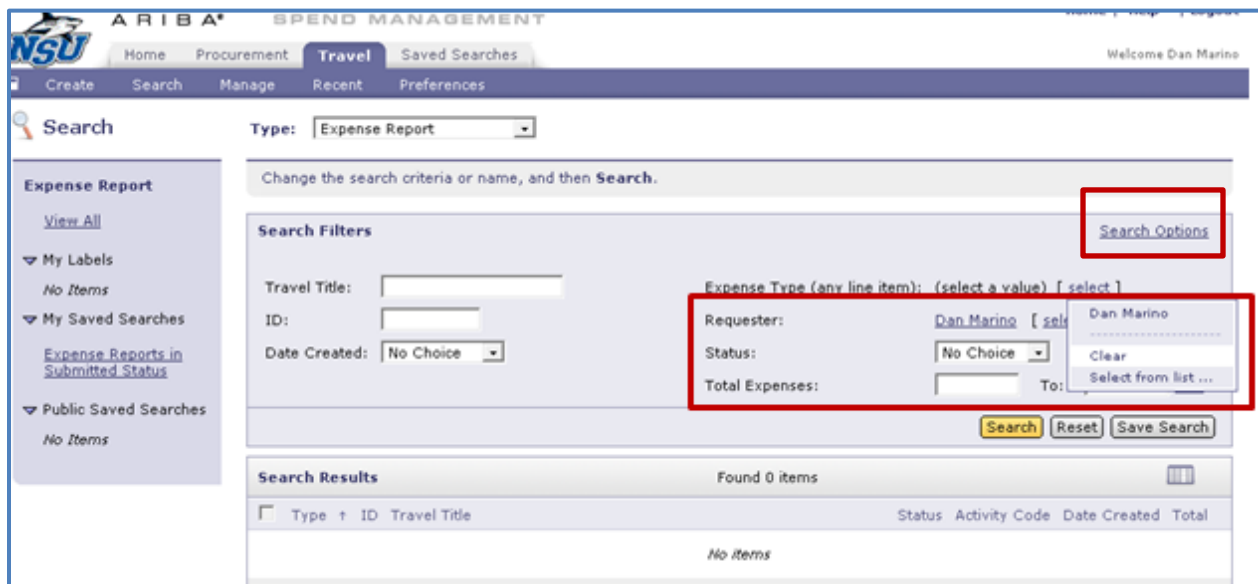
The "Saved Reports" interface shows a list of saved report queries. At the top, there is a header "Saved Reports" and a sub-header "Edit, run, copy, or delete a saved report query, or create a new report query." Below this is a table with a search bar and a dropdown menu. The table has a column "Saved Report Query" and a column for actions. The first category is "Category: Check Request (2)". It contains two entries: "Office of Information Technology - Check Request Details - 1 Jun 2013" and "OIIT - FY13 Check Request Details". Each entry has a checkbox and "Edit" and "Run" buttons. Below the table, there is a note: "Includes Doc #, Name, Requester, Date Submitted, Status, Approved Date, Credit Ind, Payee ID, Payee Name, Accounting". The second category is "Category: Expense Reports (1)".

Searching for Documents

The search interface can be accessed either via the “Search” menu option or the “Search” widget:



By default, the results will be filtered to only include documents that were submitted on behalf of the current user. You can clear this filter by clicking on the “select” link that appears next to the Requester field filter and choosing “Clear”. You can add additional filter options by clicking on the “Search Options” link:





Search Filters

Travel Title:
ID:
Date Created:

Expense Type (any line item): (select a value) [select]
Requester: (select a value) [select]
Status:
Total Expenses:

Search Results Found 0 items

☐ Type ID Travel Title Status Activity Code Date Created Total

No items

☒ Approved By
☒ Approver
☒ City (any line item)
☒ Date Approved
☒ Date Created
☒ Date Submitted
☒ Expense Type (any line item)
☒ ID
☒ Preparer
☒ Purchasing Unit
☒ Requester
☒ Status
☒ Total Expenses
☒ Travel Title
☒ Vendor (any line item)

You can click on the document "ID" or "Title" to be taken to the document details. You can change the document type for the search in the "Type" pull-down menu at the top of the search screen. You can save your search criteria by clicking the "Save Search" button and then giving it a Name:

Search

Expense Report
[View All](#)

▼ My Labels
No Items

▼ My Saved Searches
[Expense Reports in Submitted Status](#)

▼ Public Saved Searches
No Items

Type:
Change and then Search.

Search
Travel

Expense Type (any line item): (select a value) [select]
Requester: (select a value) [select]
Status:
Total Expenses: To: USD

Search Results Found 28 items

☐ Type ID Travel Title Status Activity Code Date Created Total

☐ [TR15845](#) [Testing for 770 Edit Rule Scenario 3](#) Submitted 65 Wed, 30 Jan, 2013 \$29,773.00 USD

☐ [TR15844](#) [Testing for 770 Edit Rule Scenario 5](#) Submitted 65 Wed, 30 Jan, 2013 \$600.00 USD

☐ [TR15841](#) [Testing for 770 edit rule Scenario 1](#) Submitted 65 Tue, 29 Jan, 2013 \$315.00 USD

☐ [TR15840](#) [Testing: Budget Office approves NSF<\\$1000](#) Submitted 65 Tue, 29 Jan, 2013 \$350.00 USD

☐ [TR15839](#) [Testing: Budget Office approves <\\$1000](#) Submitted 65 Tue, 29 Jan, 2013 \$1,200.00 USD

Save Search

Save the search to use again at a later time. If you have the required permission, you can save the search as a system search

Search Name:

Search Category: Check Request

Search Filters: Date Approved = This Quarter (between Mon, 1 Apr, 2013 and Sun, 30 Jun, 2013)

Saved Searches

Saved Searches can be accessed via links in the left hand navigation panel of the Search Interface. They are added to the Search widget on your dashboard by default. You can remove them by clicking on the “Remove from My Dashboard” link. Edit the search criteria or name by clicking the “Refine” button. Delete the saved search by clicking the “Delete” button. Execute the search by clicking on the “Search” button.

The screenshot shows the Search Interface with the following components:

- Search Header:** Includes a search icon, the word "Search", and a "Type:" dropdown menu set to "Check Request".
- Left Navigation Panel:**
 - Check Request:** Includes a "View All" link and a "My Labels" section with "Archive Items (1)".
 - My Saved Searches:** A red box highlights this section, which contains a link "Check Requests in Submitted Status" and a search entry "CR's Approved Q2 2013".
 - Public Saved Searches:** Shows "No Items".
- Main Content Area:**
 - Search Instructions:** "Change the search criteria or name, and then Search."
 - Saved Search: CR's Approved Q2 2013:** A red box highlights the "Remove from My Dashboard" link. Below it, the search criteria are displayed: "Date Approved: From: Mon, 1 Apr, 2013 To: Sun, 30 Jun, 2013". A red box highlights the "Search", "Refine", and "Delete" buttons.
 - Search Results:** Shows "Found 1 item". A table lists the results:

Type	ID	Title	Status	Activity Code	Date Created
Check Request	CR14142	Req about to get axed	Approved	72	Fri, 19 Apr, 2013

Saved Searches can be executed directly from the Search Widget on the Dashboard:

The screenshot shows the Search Widget on the Dashboard. It includes a "Search" button and a "My Saved Searches" section. A red box highlights the "My Saved Searches" section, which contains a link "Check Requests in Submitt.." and a search entry "CR's Approved Q2 2013".

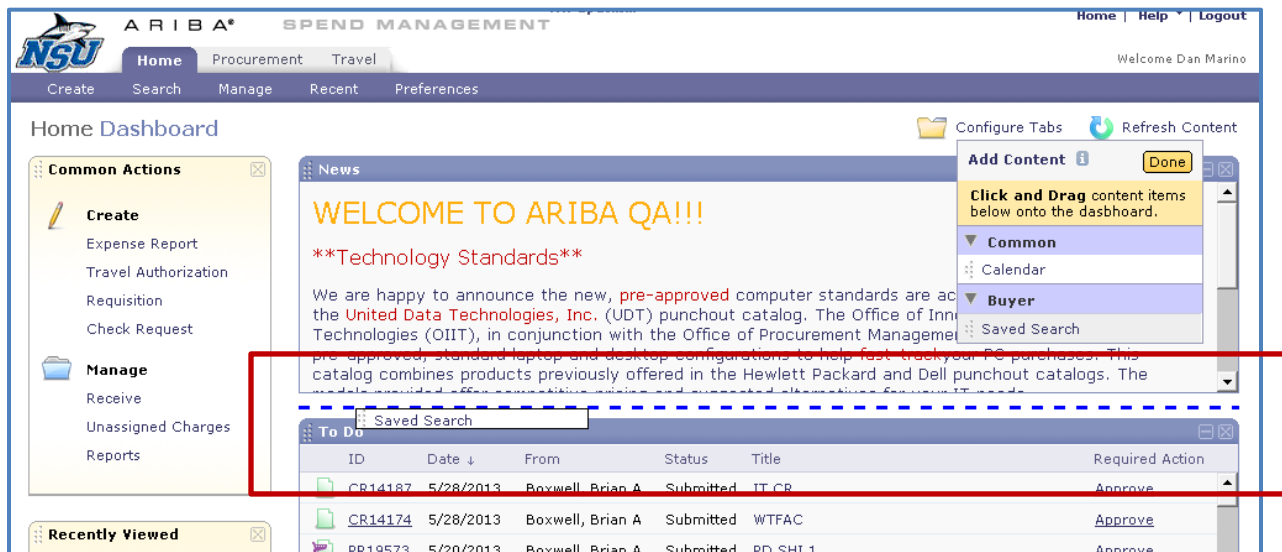
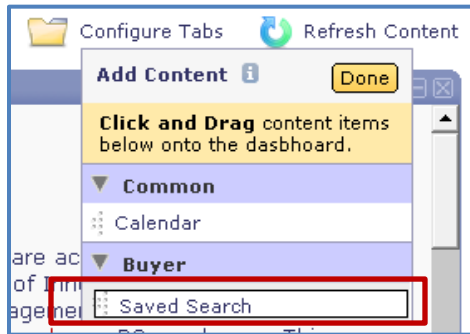
A Saved Search can be added directly to the Dashboard as a stand-alone widget. Click on “Configure Tabs” on the tab that you would like to add the widget to and then click “Add Content”:

The screenshot shows the Home Dashboard with the following components:

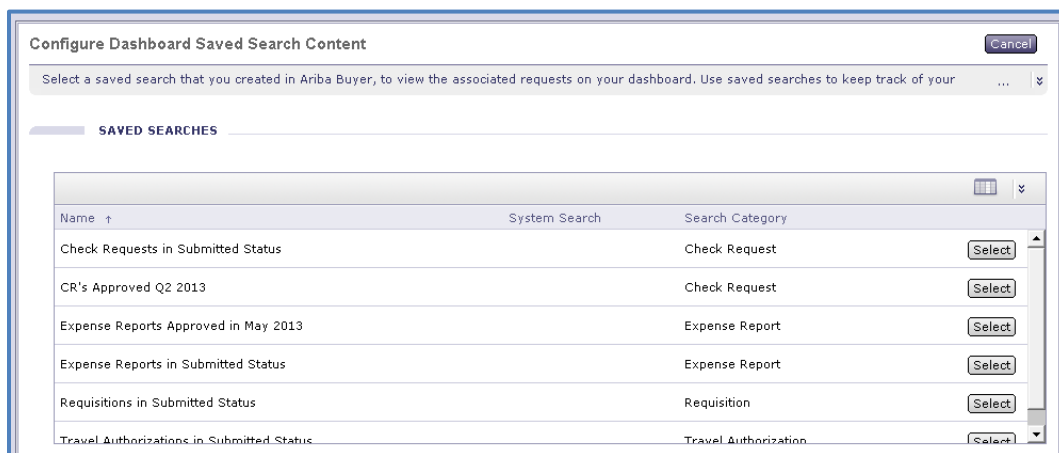
- Header:** Includes the NSU logo, ARIBA® SPEND MANAGEMENT, and navigation links: Home, Procurement, Travel, Create, Search, Manage, Recent, Preferences.
- Home Dashboard:**
 - Common Actions:** Includes a "Create" button and links for "Expense Report", "Travel Authorization", "Requisition", and "Check Request".
 - News:** Displays a welcome message "WELCOME TO ARIBA QA!!!" and a news item about "Technology Standards".
- Configure Tabs Menu:** A red box highlights the "Configure Tabs" menu, which includes options: "Current Tab", "Add Content", "Edit Properties", "Delete Tab", "Tab Set Options", "Add New Tab", "Compare Your Tabs to Default Settings", and "Revert Tab Set to Default Settings".



Drag “Saved Search” onto your dashboard where you would like the widget to appear:



Choose the Saved Search that you would like to appear in the widget:



Once the Saved Search has been added to your dashboard, you can customize the columns, groupings, and export the search results to Excel by clicking the “▼” in the top right corner:

CRs Approved Q2 2013			
ID	Date Created	Status	Title
CR14142	4/19/2013	Approved	Req about to get axed

CRs Approved Q2 2013			
ID	Date Created	Status	Title
CR14142	4/19/2013	Approved	Req about to get axed

To Do					
ID	Date ↓	From	Status	Title	
CR14187	5/28/2013	Boxwell, Brian A	Submitted	IT CR	
CR14174	5/28/2013	Boxwell, Brian A	Submitted	WTFAC	
PR19573	5/20/2013	Boxwell, Brian A	Submitted	PD SHI 1	
CR14103	2/27/2013	Banks, Isabel Y	Submitted	Test#888	
CR14101	2/26/2013	Banks, Isabel Y	Submitted	#883, sorting by item number	

- Show / Hide Columns
 - ✓ ID
 - Type
 - ✓ Date Created
 - ✓ Status
 - ✓ Title
- Group by Column
 - ID
 - Date Created
 - Status
 - Title
- Export to Excel
 - Export all Rows
 - Export Current Page
 - Edit Content

You can delete the widget from your dashboard by clicking the “x” in the top right corner, minimize with the “—”, or maximize with the “+”

CRs Approved Q2 2013					
To Do					
ID	Date ↓	From	Status	Title	Required Action
CR14187	5/28/2013	Boxwell, Brian A	Submitted	IT CR	Approve
CR14174	5/28/2013	Boxwell, Brian A	Submitted	WTFAC	Approve

You can create a new tab to house your Saved Searches. Click on “Configure Tabs” and select the “Add New Tab” option:

Configure Tabs

Refresh Content

Current Tab

- Add Content
- Edit Properties
- Delete Tab

Tab Set Options

- Add New Tab
- Compare Your Tabs to Default Settings
- Revert Tab Set to Default Settings

Give the new tab a Name and choose which document types you would like to display on it:

Add New Dashboard Tab

OK

Cancel

Enter a title for your new dashboard tab, and specify which type of documents it will include.

Tab Name:

*

Saved Searches

Document Types:


☒ Display all document types on this tab.

☐ Restrict the type of documents displayed on this tab.

OK

Cancel

Click on the tab you just created and then click “Configure Tabs”. Drag “Saved Search” onto the Dashboard:



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SPEND MANAGEMENT

Home

Procurement

Travel

Saved Searches

Welcome Dan Marino

Create

Search

Manage

Recent

Preferences

Saved Searches Dashboard

Configure Tabs

Refresh Content

Add Content

Click and Drag content items below onto the dashboard.

Common

Calendar

Buyer

Saved Search

General

News

Common Actions

Saved Searches Dashboard

Configure Tabs

Refresh Content

Add Content

Click and Drag content items below onto the dashboard.

Common

Calendar

Buyer

Saved Search

General

News

Common Actions

Recently Viewed

Search

To Do

My Documents

Drop Here

Drop Here

Drop Here



Choose the Saved Search that you would like to appear on your new tab:

Configure Dashboard Saved Search Content Cancel

Select a saved search that you created in Ariba Buyer, to view the associated requests ...

SAVED SEARCHES

Name	System Search	Search Category	
Check Requests in Submitted Status	Check Request		Select
CR's Approved Q2 2013	Check Request		Select
Expense Reports Approved in May 2013	Expense Report		Select
Expense Reports in Submitted Status	Expense Report		Select
Requisitions in Submitted Status	Requisition		Select
Travel Authorizations in Submitted Status	Travel Authorization		Select

You can add multiple saved searches to the tab, showing multiple types of documents:

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Create Search Manage Recent Preferences

Saved Searches Dashboard Configure Tabs Refresh Content

Check Requests in Submitted Status

ID	Type	Date Created	Status	Title
CR13182		7/5/2012	Submitted	Test-Prior Year Box
CR13590		10/5/2012	Submitted	Testing CAG
CR13692		11/21/2012	Submitted	Test-65 Routing Changes
CR13693		11/21/2012	Submitted	Test-Routing 010109
CR13694		11/21/2012	Submitted	Test-Routing

Requisitions in Submitted Status

ID	Type	Date Created	Status	Enter Requisition Name
PR5419		11/12/2009	Denied	Order 25 pharmac...
PR6549		3/31/2010	Ordered	Bio-rad order
PR6591		4/5/2010	Ordered	Copy of BioRad PC
PR6592		4/5/2010	Ordered	Copy of BioRad Te
PR6636		4/21/2010	Ordered	Bio-rad testing

Expense Reports in Submitted Status

ID	Type	Date Created	Status	Travel Title	
TR15659		10/5/2012	Submitted	Testing CAG	\$
TR15666		10/15/2012	Submitted	Expenses: 10/15/2012 to 10/16/2012	\$2
TR15667		10/15/2012	Submitted	Expenses: 10/11/2012 to 10/12/2012	\$

Travel Authorizations in Submitted Status

ID	Type	Date Created	Status	Travel Title	
TA13648		10/8/2012	Submitted	Travel: 12/12/2012 to 12/25/2012	\$120
TA13652		10/15/2012	Submitted	Travel: 10/15/2012 to 10/18/2012	\$1

Please contact ariba@nova.edu if you have any questions or need assistance with these features.