

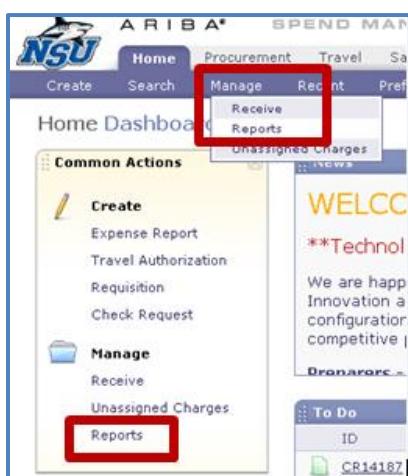
ARIBA: Reporting and Searching

Introduction

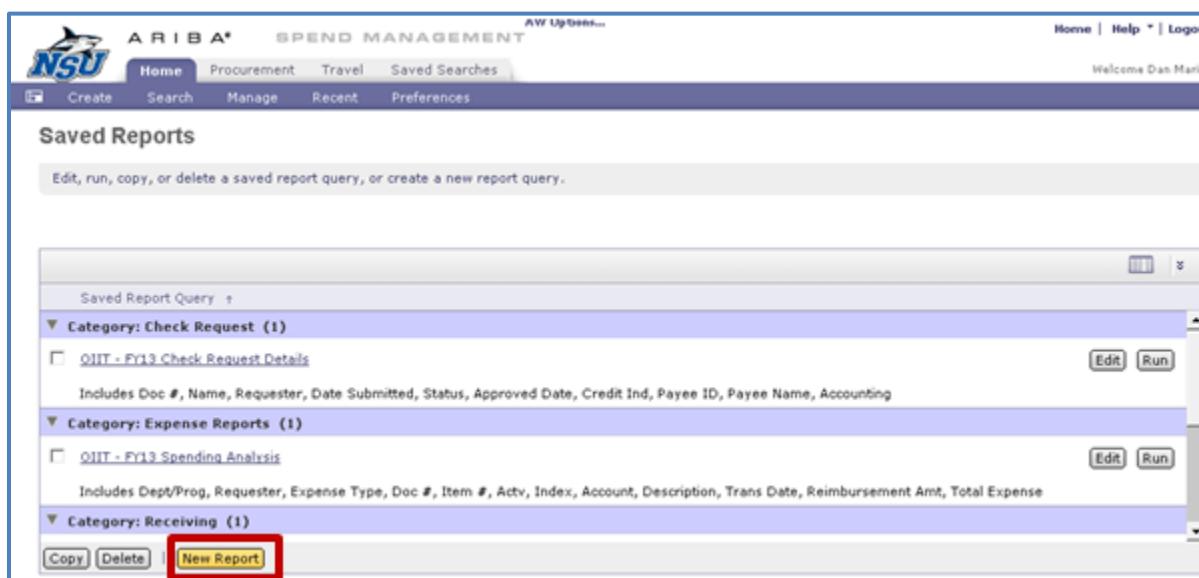
Ariba's Reporting Module and Search Interface can be useful tools for document tracking and spend analysis. Reports are best used for viewing large document sets and aggregating data, whereas searches can be helpful when monitoring small document sets or trying to obtain very detailed information. It 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:





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Choose a report category and click "Next":

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Home Procurement Travel Saved Searches

Welcome Dan Marino

Create Search Manage Recent Preferences

Reports

1 Select Category

2 Select Report

3 Run Report

Check Request
Expense Reports
Receiving
Requisition

Next ► Exit

Select a report and click "Next":

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):

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:

Basic Advanced

Filter Name Value

Date Requested: No Choice

◀ Prev Run Save Exit

Apply desired filters to restrict report result set:

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:

Basic **Advanced**

Filter Name	Value
Date Requested:	<input type="button" value="No Choice"/>
Date Submitted:	<input type="button" value="No Choice"/>
Needed Date:	<input type="button" value="No Choice"/> Today Yesterday This Week Last Week This Month Last Month This Quarter Last Quarter This Year Last Year ----- Custom
Status:	
Is this a new vendor?	
Is this an independent contractor?	
Is this a credit?	
Vendor Invoice Date:	
Amount:	<input type="text"/> To: <input type="text"/> <input type="button" value="USD"/>
Activity Code:	<input type="button" value="select a value"/> [select]

Tailor report columns:

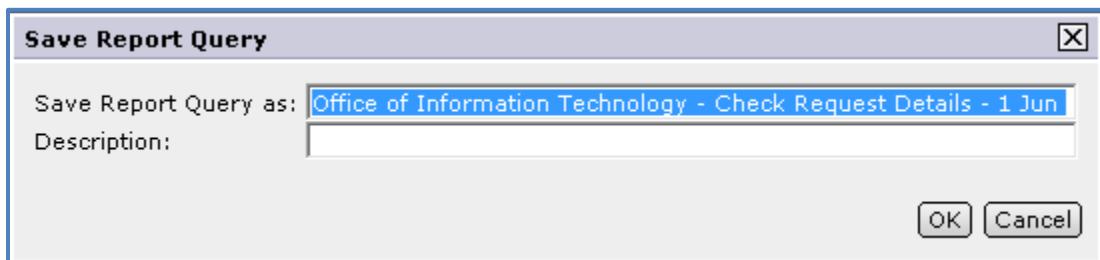
If you don't specify filter values, the report will include all values.

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

Basic **Advanced**

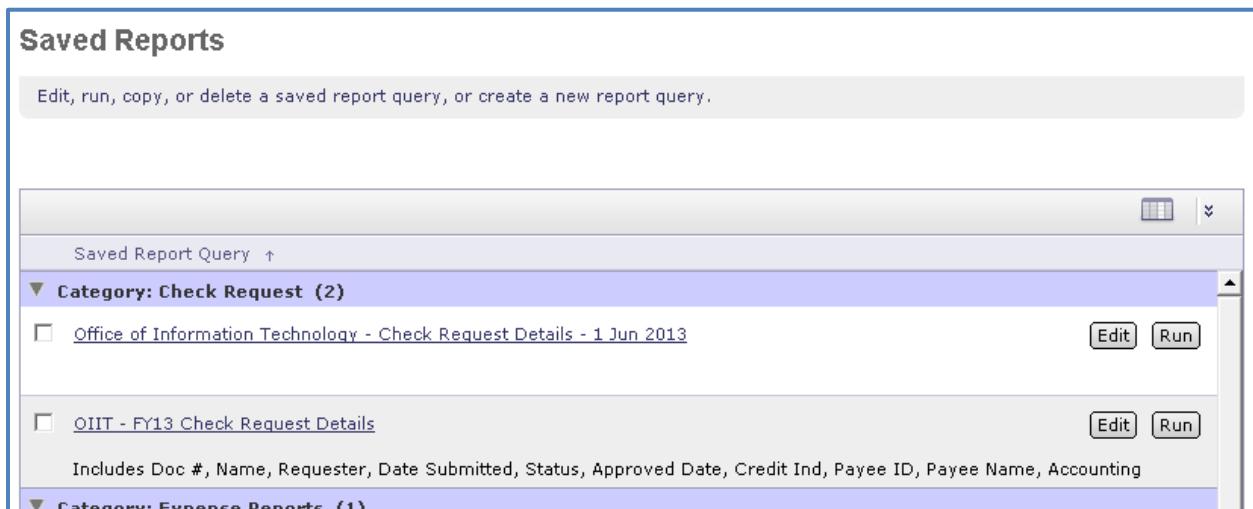
Name ↑	Display	Filter	Value
Account:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="select a value"/> [select]
Account:	<input checked="" type="checkbox"/>		
Activity Code:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="select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

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:



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:

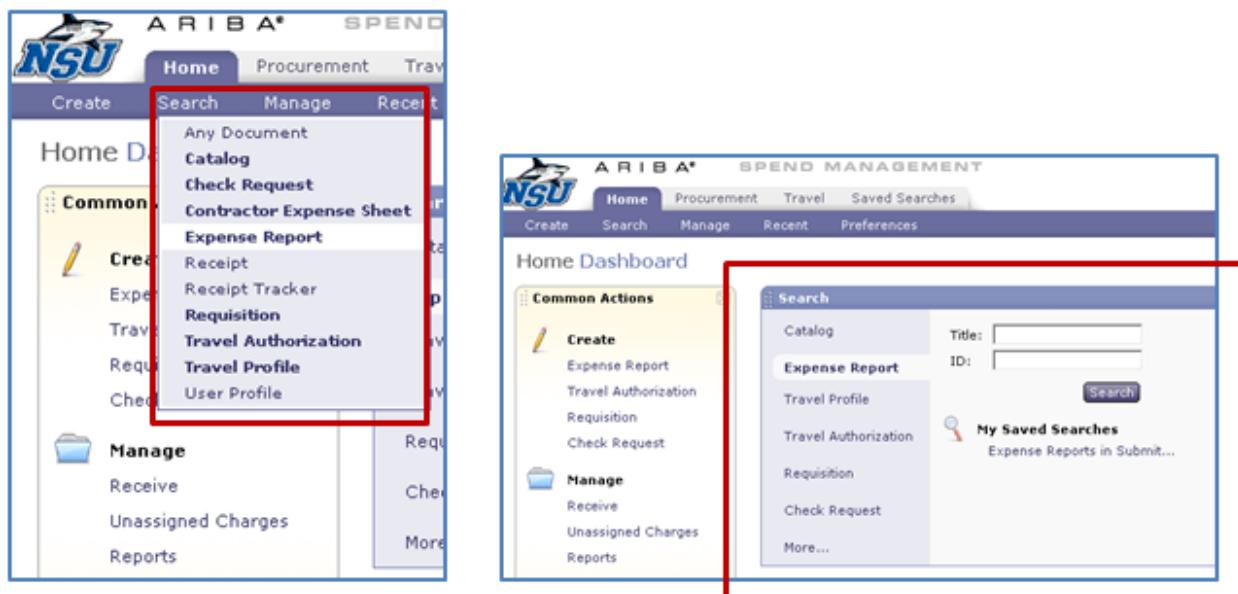


The interface shows a "Saved Reports" section with a sub-header "Edit, run, copy, or delete a saved report query, or create a new report query.". Below is a list of saved report queries:

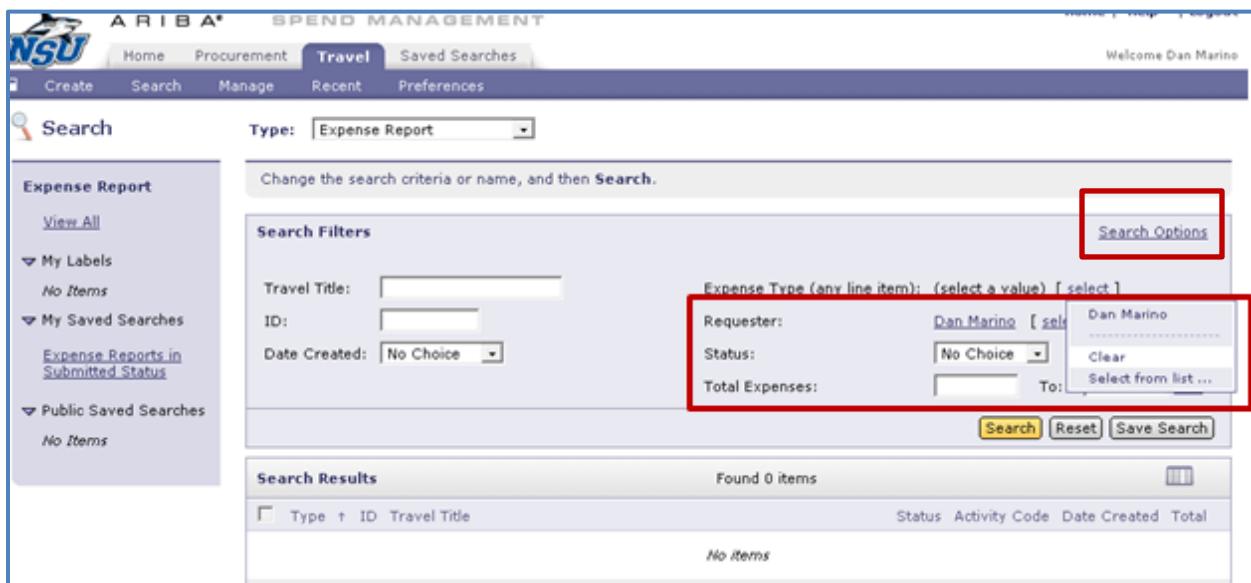
Category	Report Name	Actions
Category: Check Request (2)	Office of Information Technology - Check Request Details - 1 Jun 2013	Edit Run
	OIIT - FY13 Check Request Details	Edit Run
Includes Doc #, Name, Requester, Date Submitted, Status, Approved Date, Credit Ind, Payee ID, Payee Name, Accounting		
Category: Finance 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:





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Search Filters

Travel Title:

ID:

Date Created:

Expense Type (any line item):

Requester:

Status:

Total Expenses:

Search Results

Found 0 items

Type	ID	Travel Title	Status	Activity
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)

Select All
Hide All

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

Type:

Check Request
Contractor Expense Sheet
Expense Report
Receipt
Receipt Tracker
Requisition
Travel Authorization
Travel Profile
User Profile

Search Results

Found 28 items

Type	ID	Travel Title	Status	Activity Code	Date Created	Total
<input type="checkbox"/>	TR15845	Testing for 770 Edit Rule Scenario 3 TR	Submitted	65	Wed, 30 Jan, 2013	\$29,773.00 USD
<input type="checkbox"/>	TR15844	Testing for 770 Edit Rule Scenario 5 TR	Submitted	65	Wed, 30 Jan, 2013	\$600.00 USD
<input type="checkbox"/>	TR15841	Testing for 770 edit rule Scenario 1 TR	Submitted	65	Tue, 29 Jan, 2013	\$315.00 USD
<input type="checkbox"/>	TR15840	Testing: Budget Office approves NSF<\$1000	Submitted	65	Tue, 29 Jan, 2013	\$350.00 USD
<input type="checkbox"/>	TR15839	Testing: Budget Office approves <\$1000	Submitted	65	Tue, 29 Jan, 2013	\$1,200.00 USD

Search Options

Expense Type (any line item):

ID:

Date Approved:

Status:

Date Created:

Total Expenses:

Search

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:

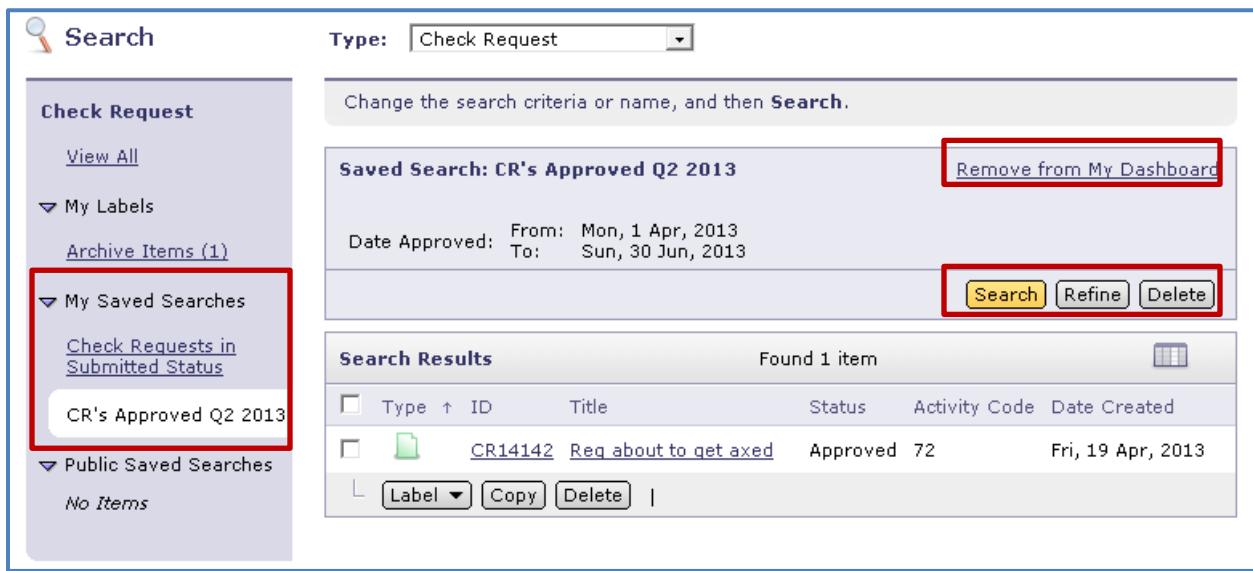
Search Category: Check Request

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

OK Cancel

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 ARIBA Spend Management search interface. On the left, there is a navigation panel with a 'Search' icon. The 'Check Request' section is expanded, showing 'View All', 'My Labels' (with 'Archive Items (1)'), 'My Saved Searches' (with 'Check Requests in Submitted Status' and 'CR's Approved Q2 2013' highlighted with a red box), and 'Public Saved Searches' (with 'No Items'). The main area shows a search bar with 'Type: Check Request' and a dropdown. Below it is a 'Saved Search: CR's Approved Q2 2013' section with a date range from 'Mon, 1 Apr, 2013' to 'Sun, 30 Jun, 2013'. To the right of this section are 'Remove from My Dashboard', 'Search', 'Refine', and 'Delete' buttons, all highlighted with red boxes. Below this is a 'Search Results' table with one item found. The table columns are Type, ID, Title, Status, Activity Code, and Date Created. The item listed is 'CR14142 Req about to get axed' with status 'Approved', activity code '72', and date 'Fri, 19 Apr, 2013'. Action buttons 'Label', 'Copy', 'Delete', and a separator line are at the bottom of the table.

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



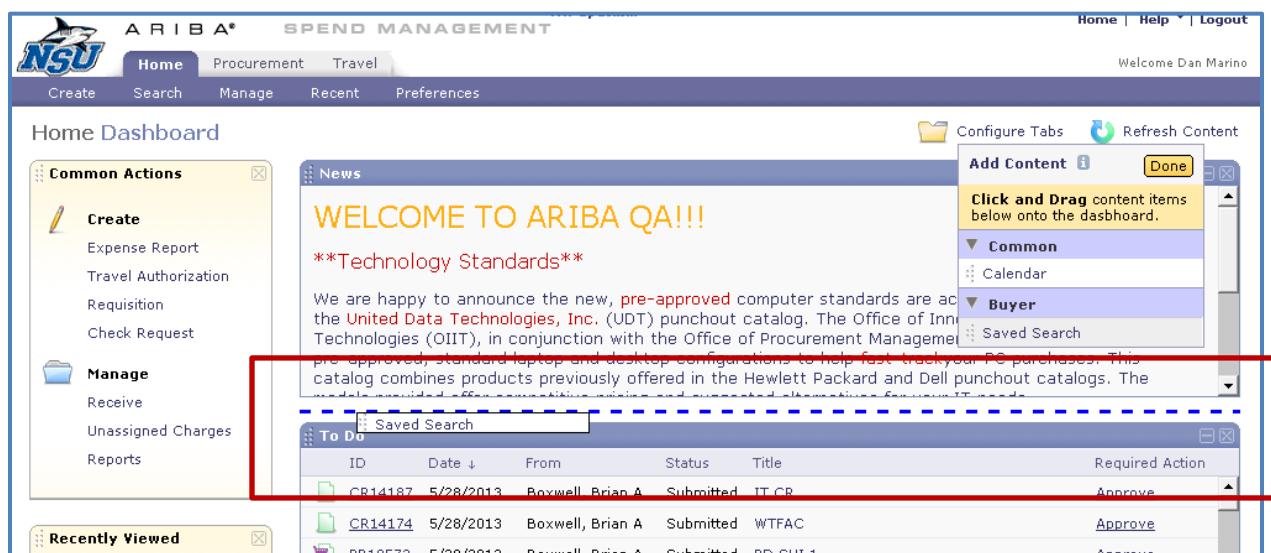
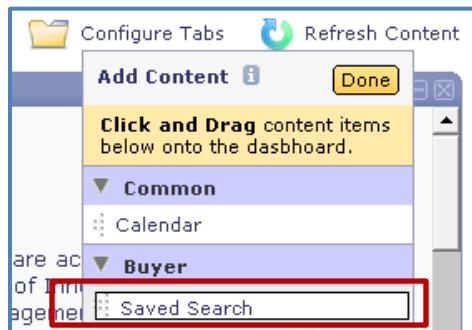
The screenshot shows the ARIBA Spend Management dashboard. On the left, there is a sidebar with 'Catalog', 'Expense Report', 'Travel Profile', 'Travel Authorization', 'Requisition', 'Check Request' (highlighted with a red box), and 'More...'. The main area contains a 'Search' widget with fields for 'Title' and 'ID', and a 'Search' button. Below the search widget is a 'My Saved Searches' section with a magnifying glass icon. It lists 'Check Requests in Submitt.' and 'CR's Approved Q2 2013', both highlighted with a red box. To the right of this section is a 'My Labels' section with 'Archive Items (1)'.

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”:

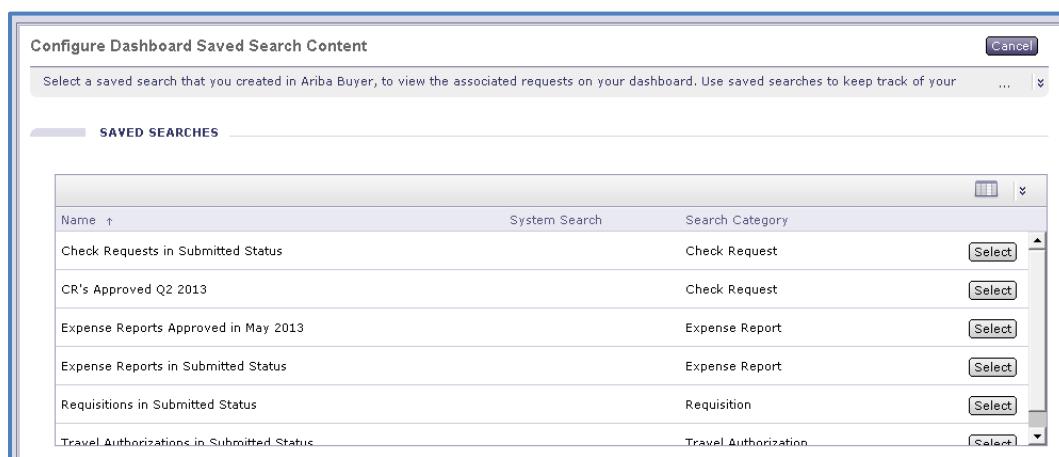


The screenshot shows the ARIBA Spend Management Home Dashboard. The top navigation bar includes 'Home', 'Procurement', 'Travel', 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The 'Home Dashboard' section features a 'Common Actions' box with 'Create', 'Expense Report', 'Travel Authorization', 'Requisition', and 'Check Request' buttons. A 'News' box displays 'WELCOME TO ARIBA QA!!!' and '**Technology Standards**'. A context menu is open over the 'Check Request' button in the 'Common Actions' box, with 'Configure Tabs' highlighted and a red box. The menu options are: 'Configure Tabs', '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:





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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

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

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

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

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

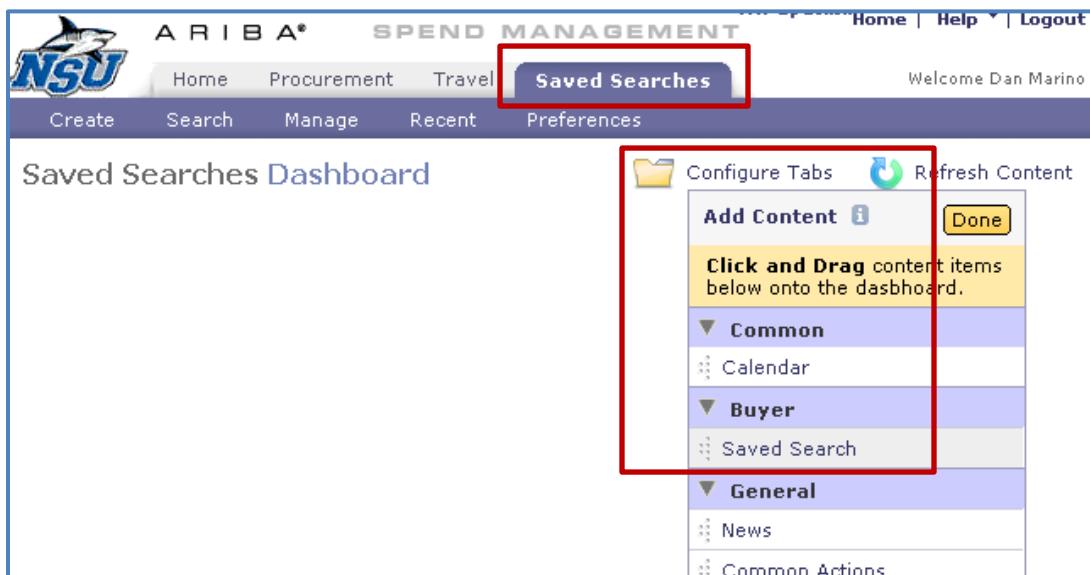
Tab Name: *

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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Home | Help | Logout

Welcome Dan Marino

NSU

Home Procurement Travel **Saved Searches** Preferences

Create Search Manage Recent

Saved Searches Dashboard

Configure Tabs Refresh Content

Add Content **Done**

Click and Drag content items below onto the dashboard.

Common

Calendar

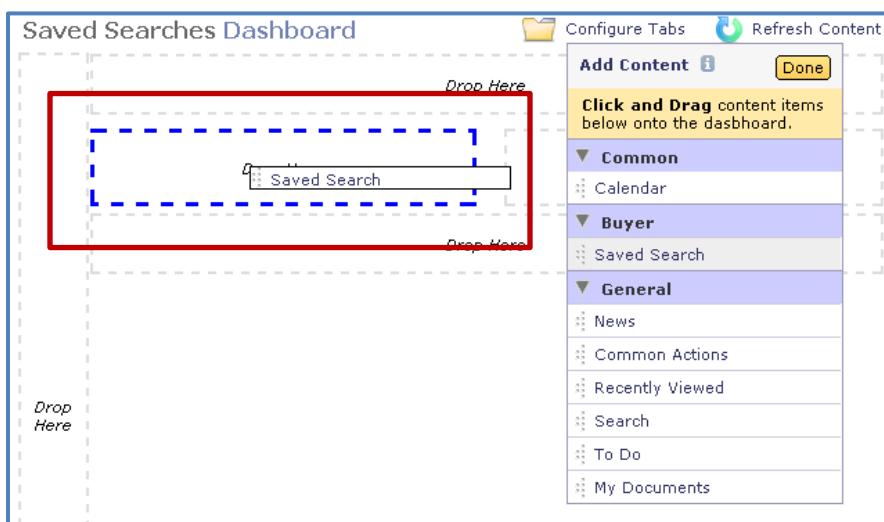
Buyer

Saved Search

General

News

Common Actions



Saved Searches Dashboard

Configure Tabs Refresh Content

Add Content **Done**

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

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

SAVED SEARCHES

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

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

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Home | Help | Logout

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Saved Searches Dashboard

Check Requests in Submitted Status

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

Requisitions in Submitted Status

ID	Type	Date Created	Status	Enter Requisition Name
PR5419	File	11/12/2009	Denied	Order 25 pharmac widgets
PR6549	File	3/31/2010	Ordered	Bio-rad order
PR6591	File	4/5/2010	Ordered	Copy of BioRad PC Test Order # 1
PR6592	File	4/5/2010	Ordered	Copy of BioRad Test Order # 2
PR6636	File	4/21/2010	Ordered	Bio-rad testing

Expense Reports in Submitted Status

ID	Type	Date Created	Status	Travel Title
TR15659	File	10/5/2012	Submitted	Testing CAG
TR15666	File	10/15/2012	Submitted	Expenses: 10/15/2012 to 10/16/2012
TR15667	File	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	File	10/8/2012	Submitted	Travel: 12/12/2012 to 12/25/2012
TA13652	File	10/15/2012	Submitted	Travel: 10/15/2012 to 10/18/2012

Configure Tabs  **Refresh Content** 

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