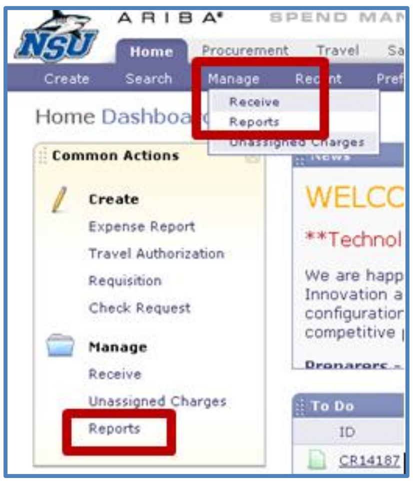
ARIBA: Reporting and Searching

Introduction

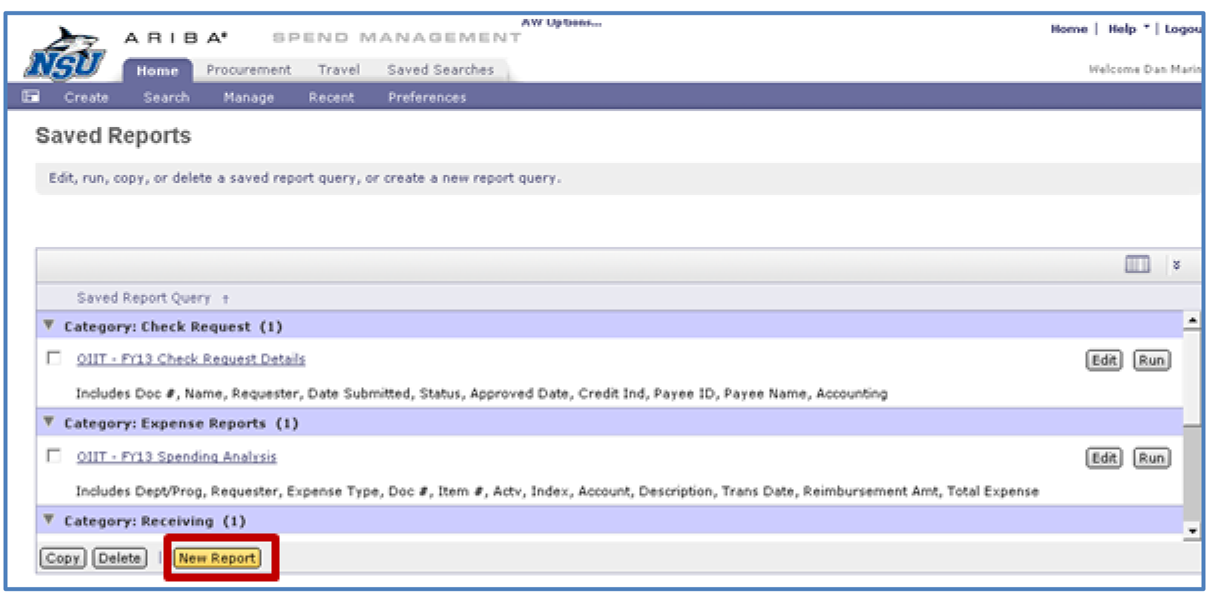
Ariba’s Reporting Module and Search Interface can be useful tools for document tracking and spend analysis. Reports are best used for viewing large document sets and aggregating data, whereas searches can be helpful when monitoring small document sets or trying to obtain very detailed information. It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

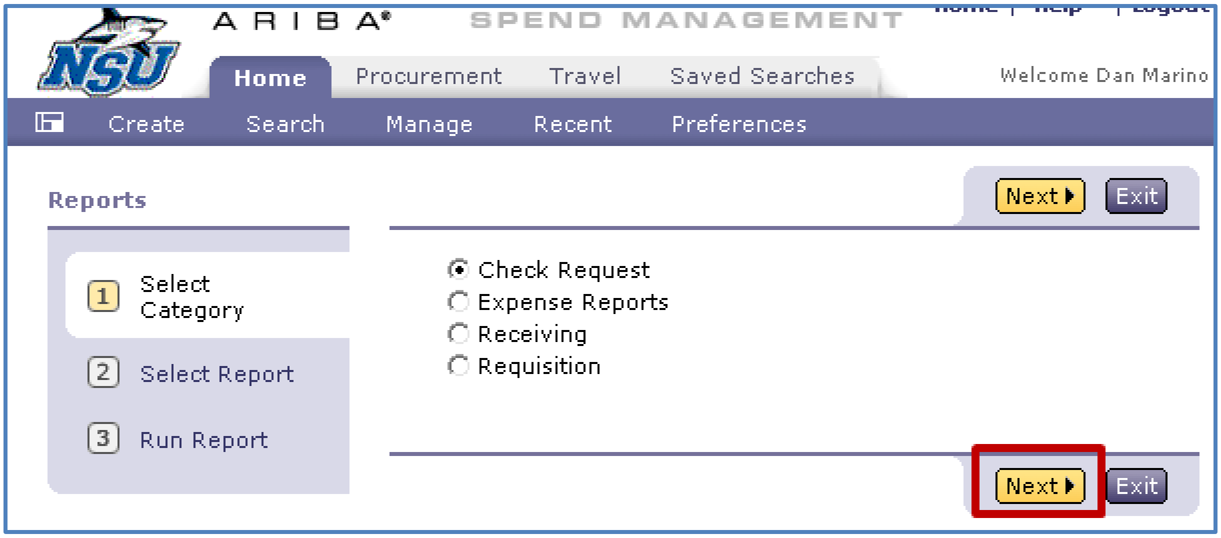
The reporting module can be accessed either via the “Common Actions” widget or the “Manage -> Reports” menu option:



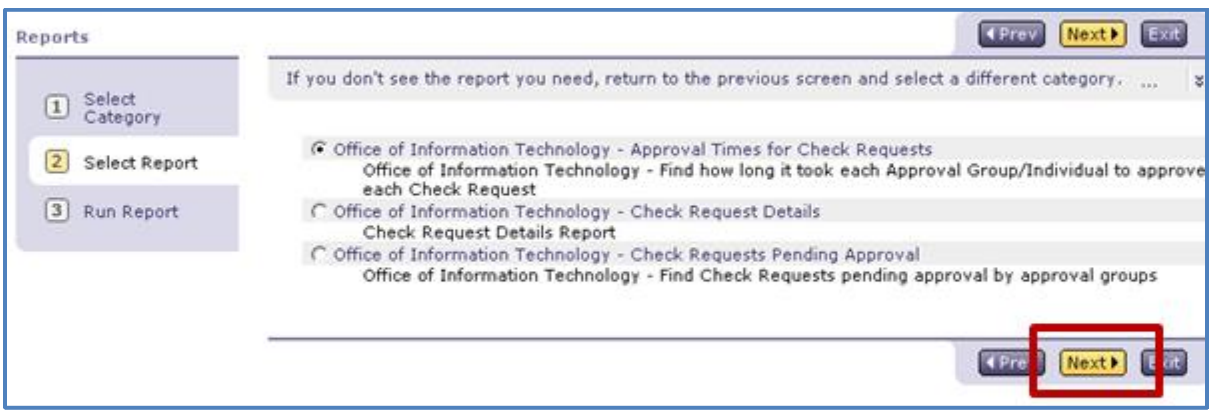
If you have saved reports, they will be presented to you. Click “New Report” to create a new report:



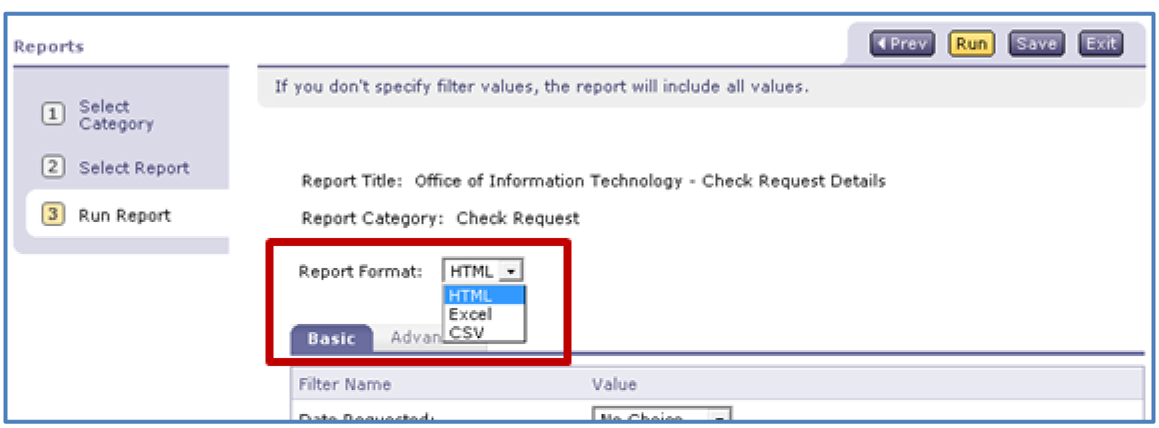
Choose a report category and click "Next":



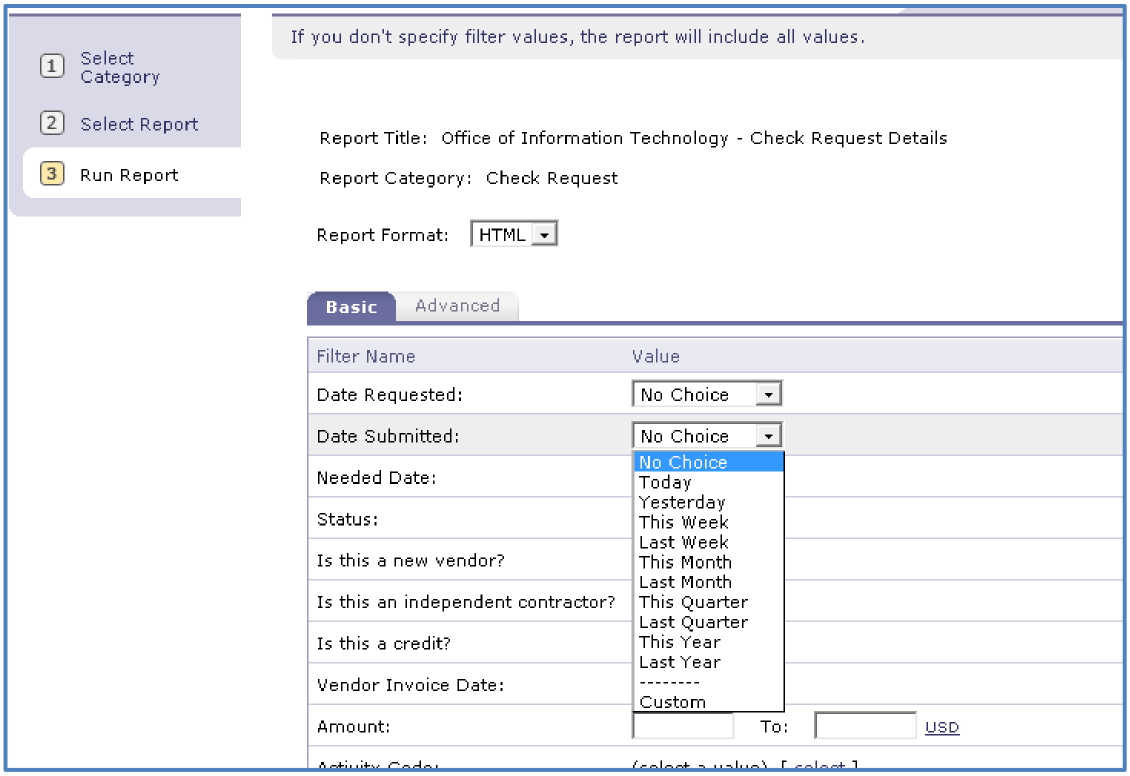
Select a report and click "Next":



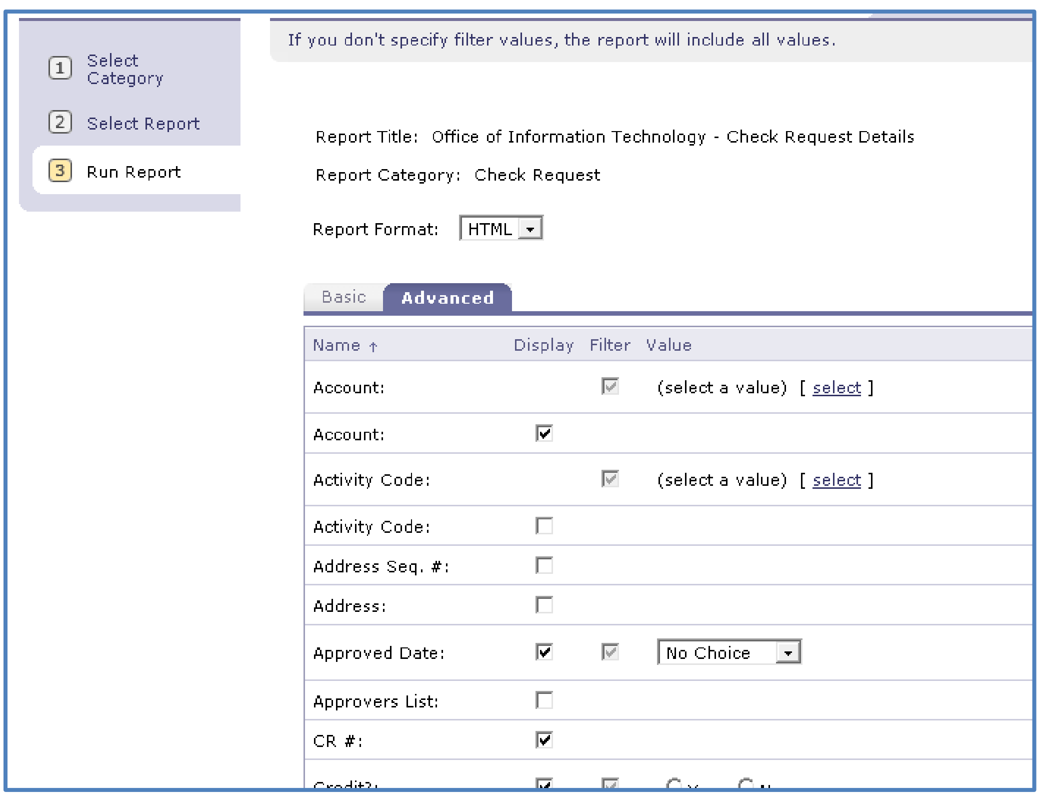
Choose a report format (HTML, Excel, or CSV):



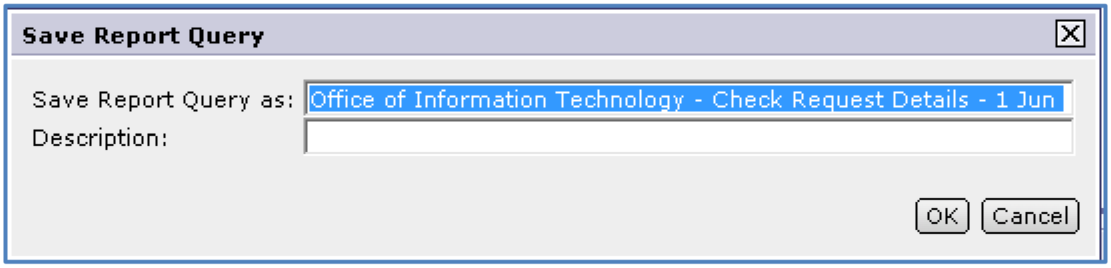
Apply desired filters to restrict report result set:



Tailor report columns:

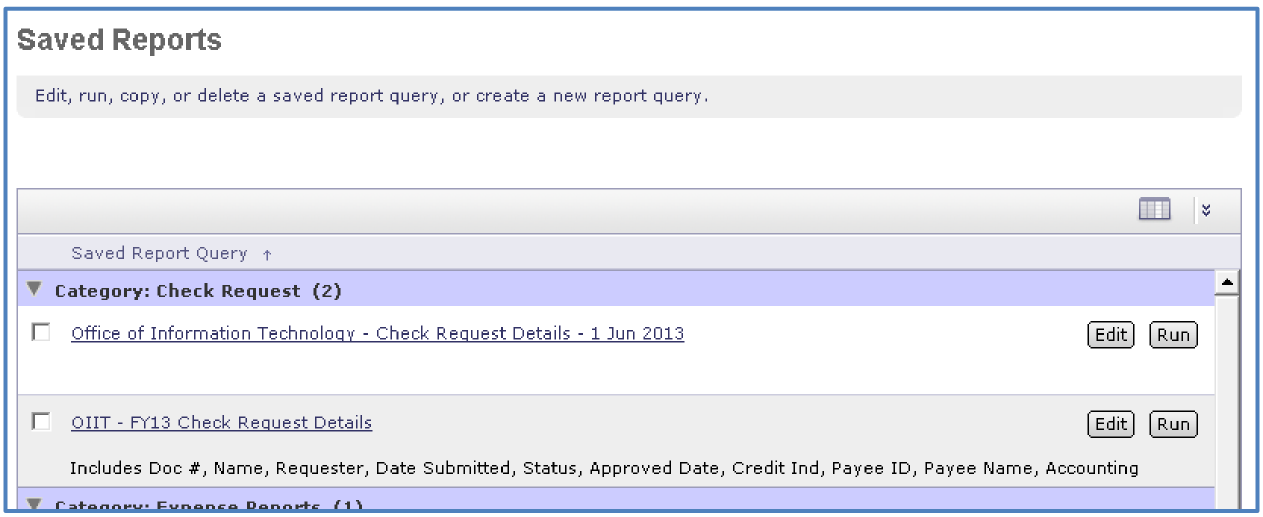


Click “Save” if you would like to be able to run this report with the provided parameters again in the future. A dialog box will appear for you to give the saved report a title and description:



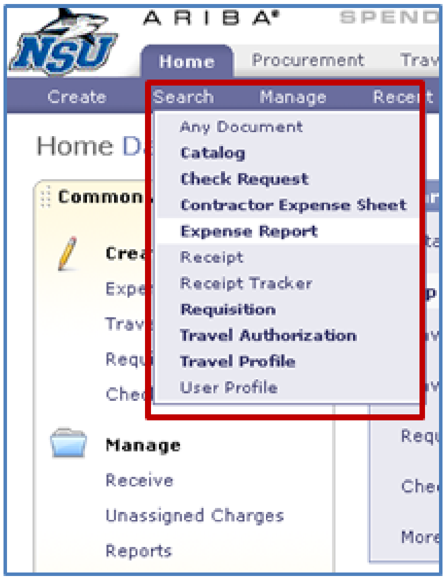
Click either “Run” to run the report or Exit to return to your dashboard.

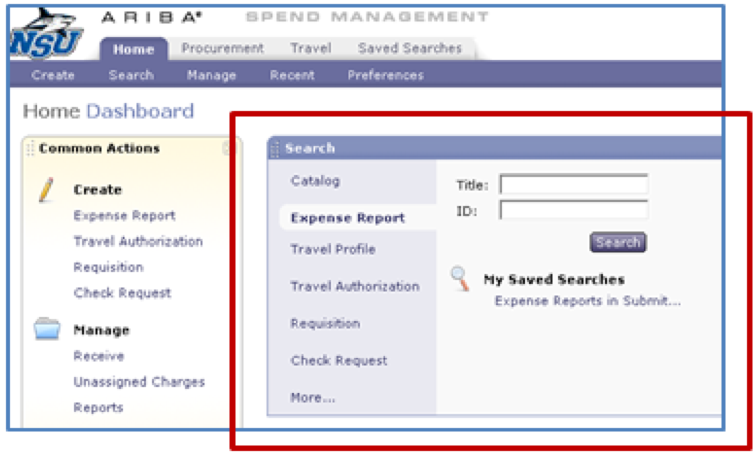
The next time that you access the reporting module, you will be presented with the option to run your newly saved report:



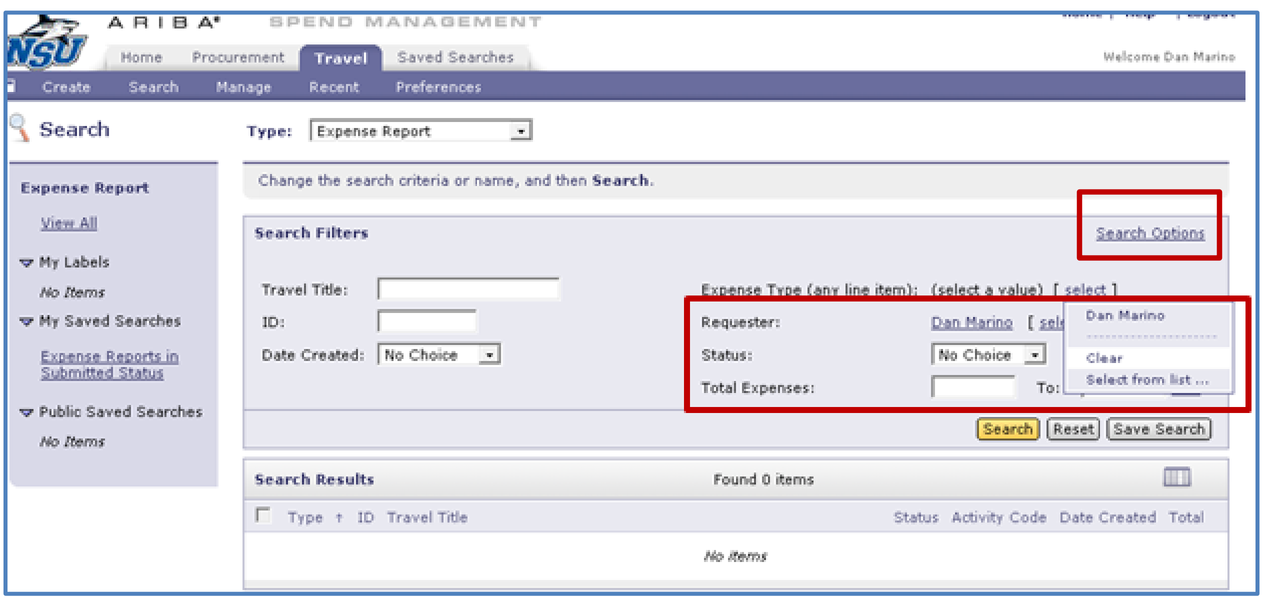
Searching for Documents

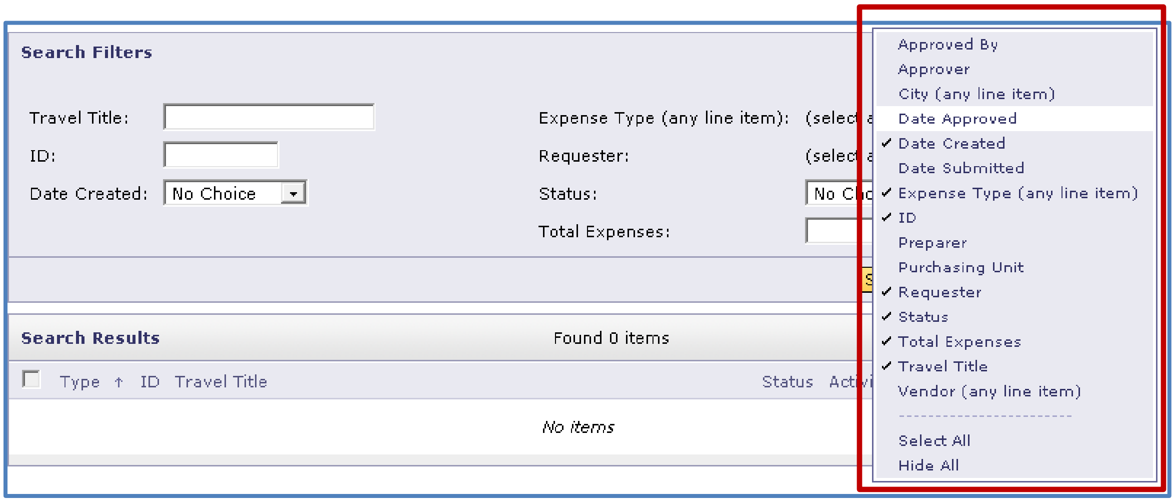
The search interface can be accessed either via the “Search” menu option or the “Search” widget:



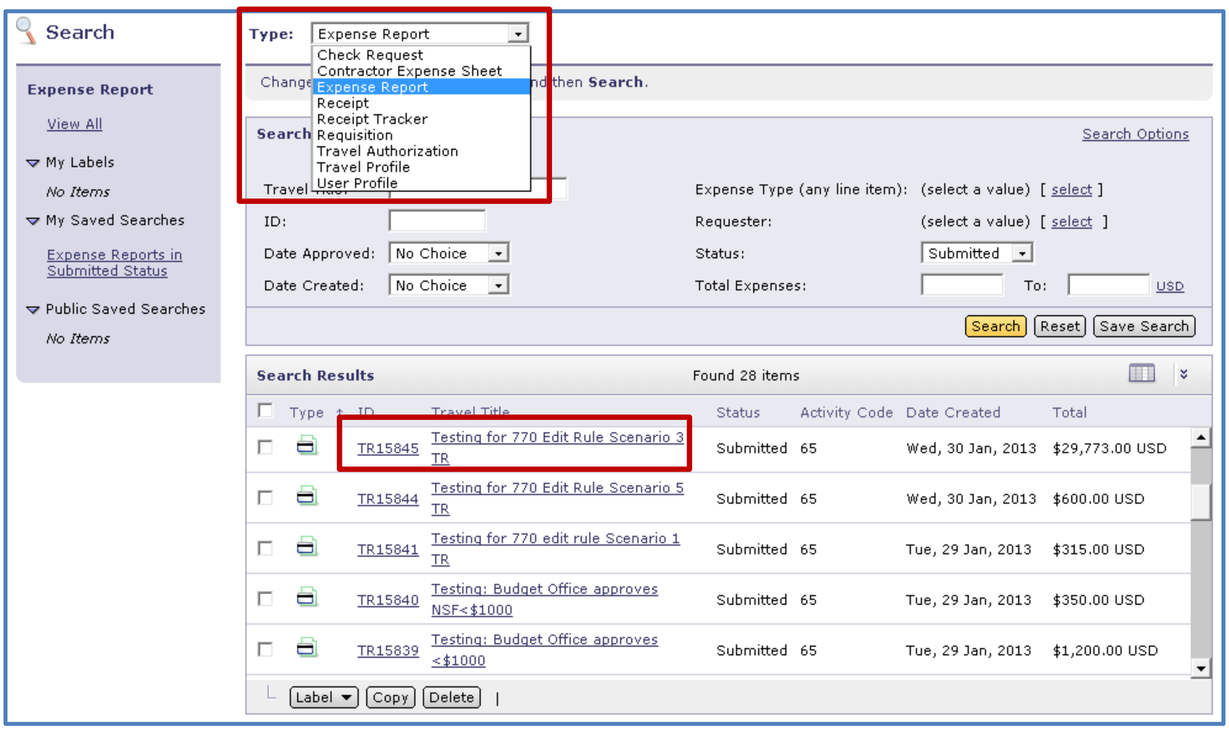


By default, the results will be filtered to only include documents that were submitted on behalf of the current user. You can clear this filter by clicking on the “select” link that appears next to the Requester field filter and choosing “Clear”. You can add additional filter options by clicking on the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



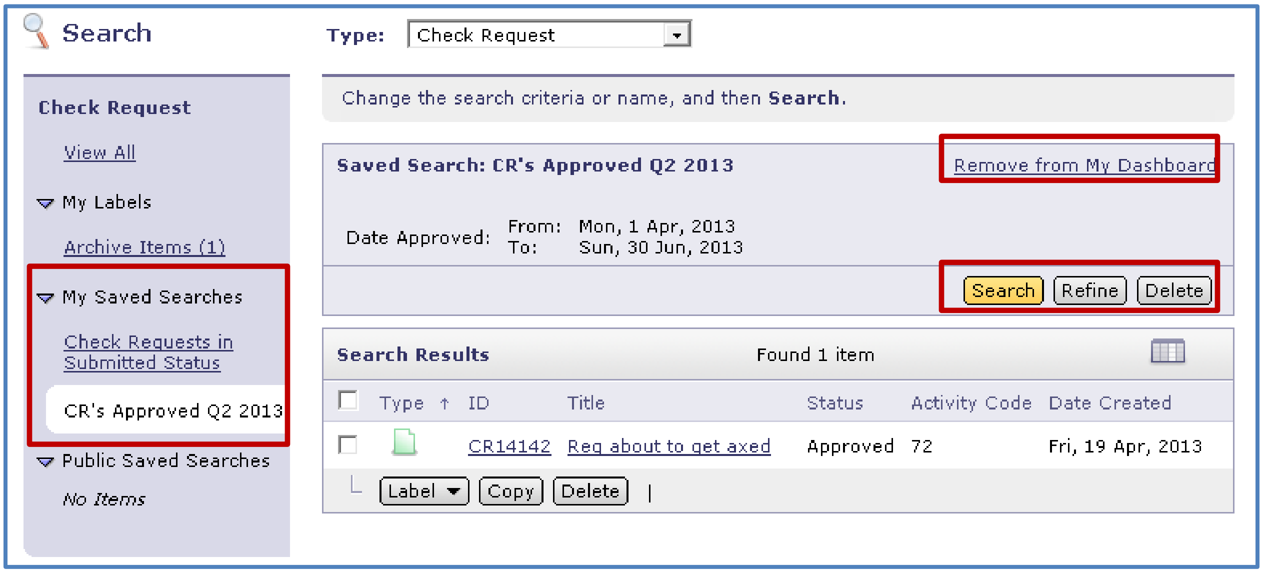


You can click on the document "ID" or "Title" to be taken to the document details. You can change the document type for the search in the "Type" pull-down menu at the top of the search screen. You can save your search criteria by clicking the "Save Search" button and then giving it a Name:



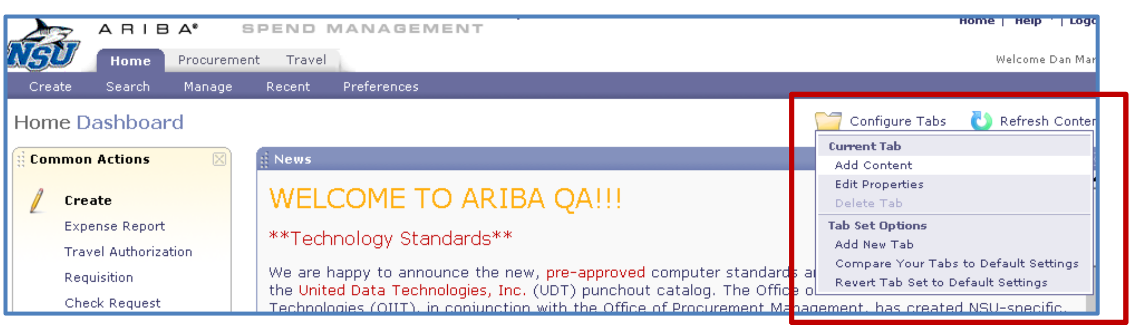
Saved Searches

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.

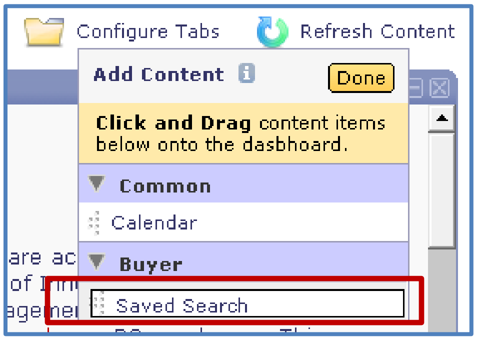


Saved Searches can be executed directly from the Search Widget on the Dashboard:

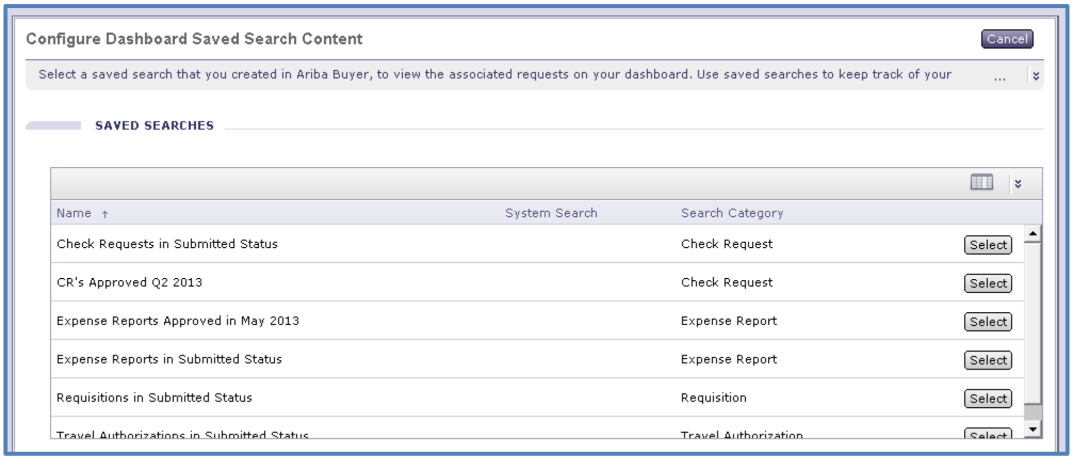
A Saved Search can be added directly to the Dashboard as a stand-alone widget. Click on “Configure Tabs” on the tab that you would like to add the widget to and then click “Add Content”:



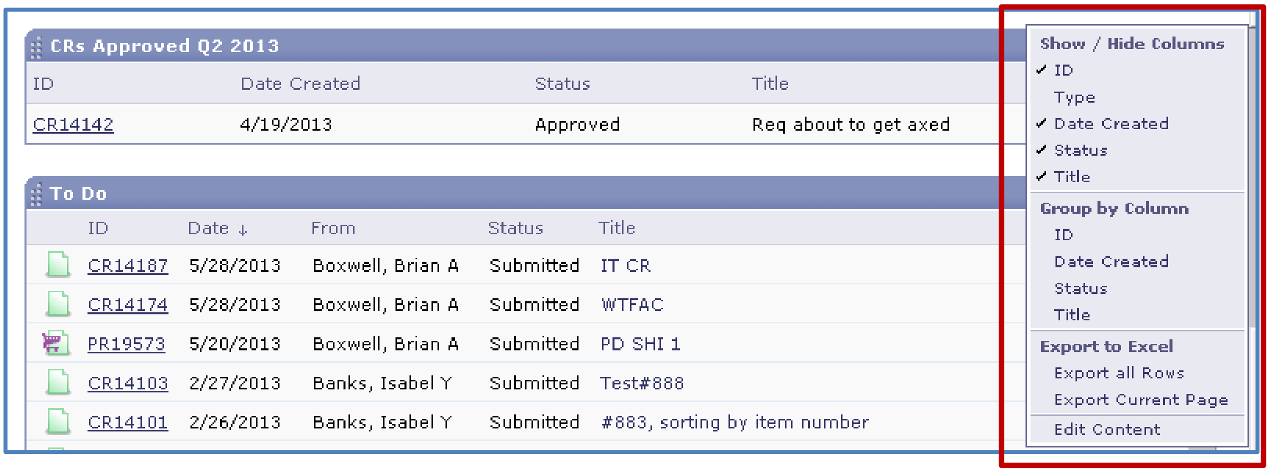
Drag "Saved Search" onto your dashboard where you would like the widget to appear:



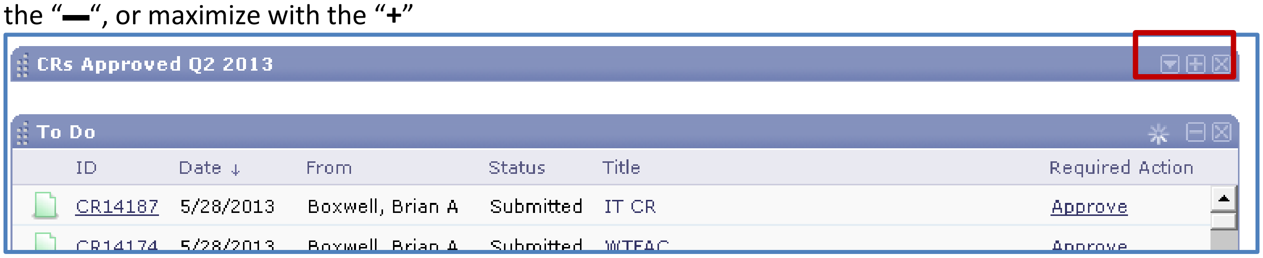
Choose the Saved Search that you would like to appear in the widget:



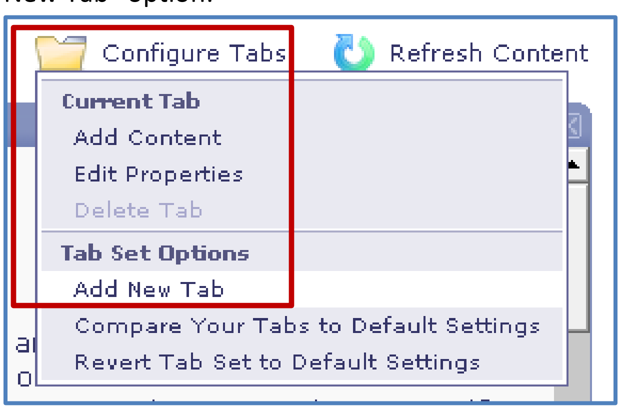
Once the Saved Search has been added to your dashboard, you can customize the columns, groupings, and export the search results to Excel by clicking the "▼" in the top right corner:



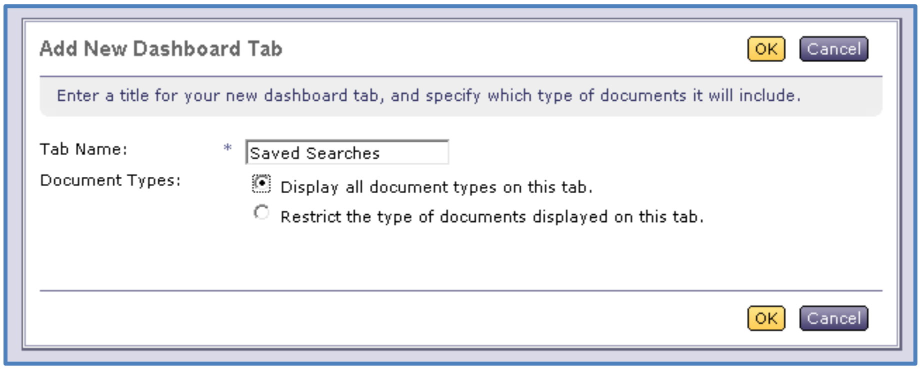
You can delete the widget from your dashboard by clicking the "**x**" in the top right corner, minimize with the "**—**", or maximize with the "**+**"



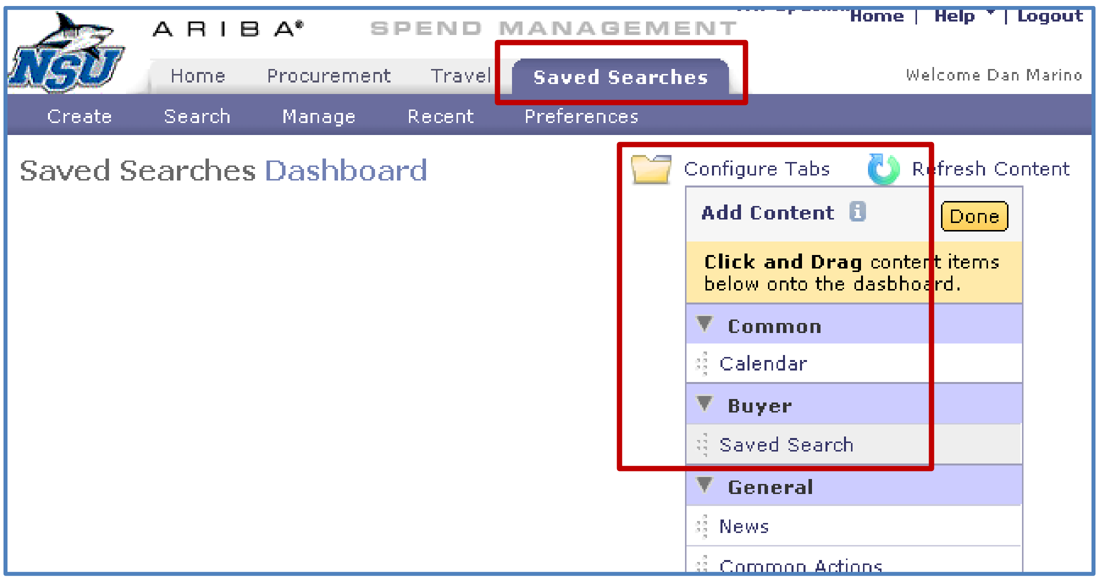
You can create a new tab to house your Saved Searches. Click on "Configure Tabs" and select the "Add New Tab" option:

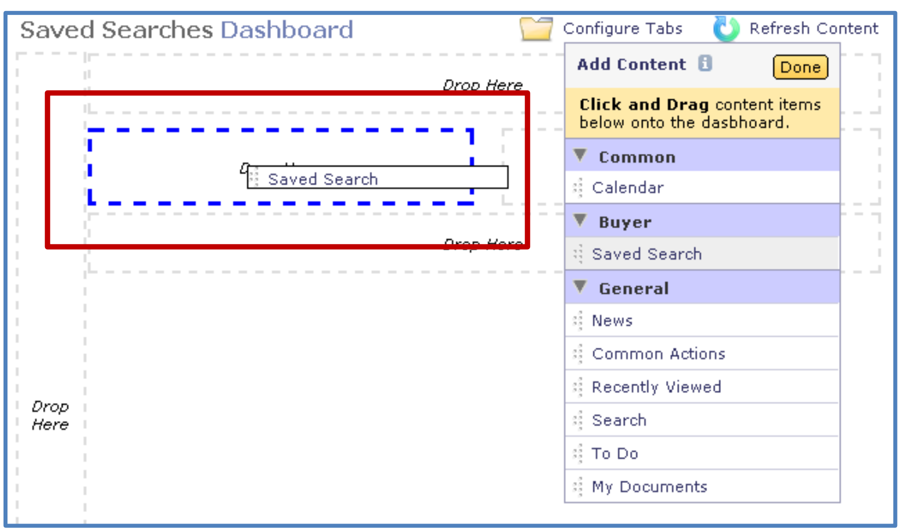


Give the new tab a Name and choose which document types you would like to display on it:

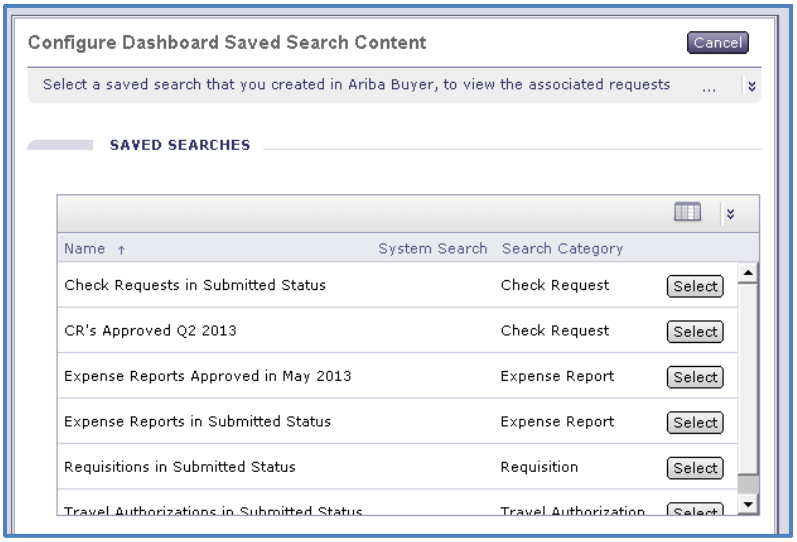


Click on the tab you just created and then click “Configure Tabs”. Drag “Saved Search” onto the Dashboard:

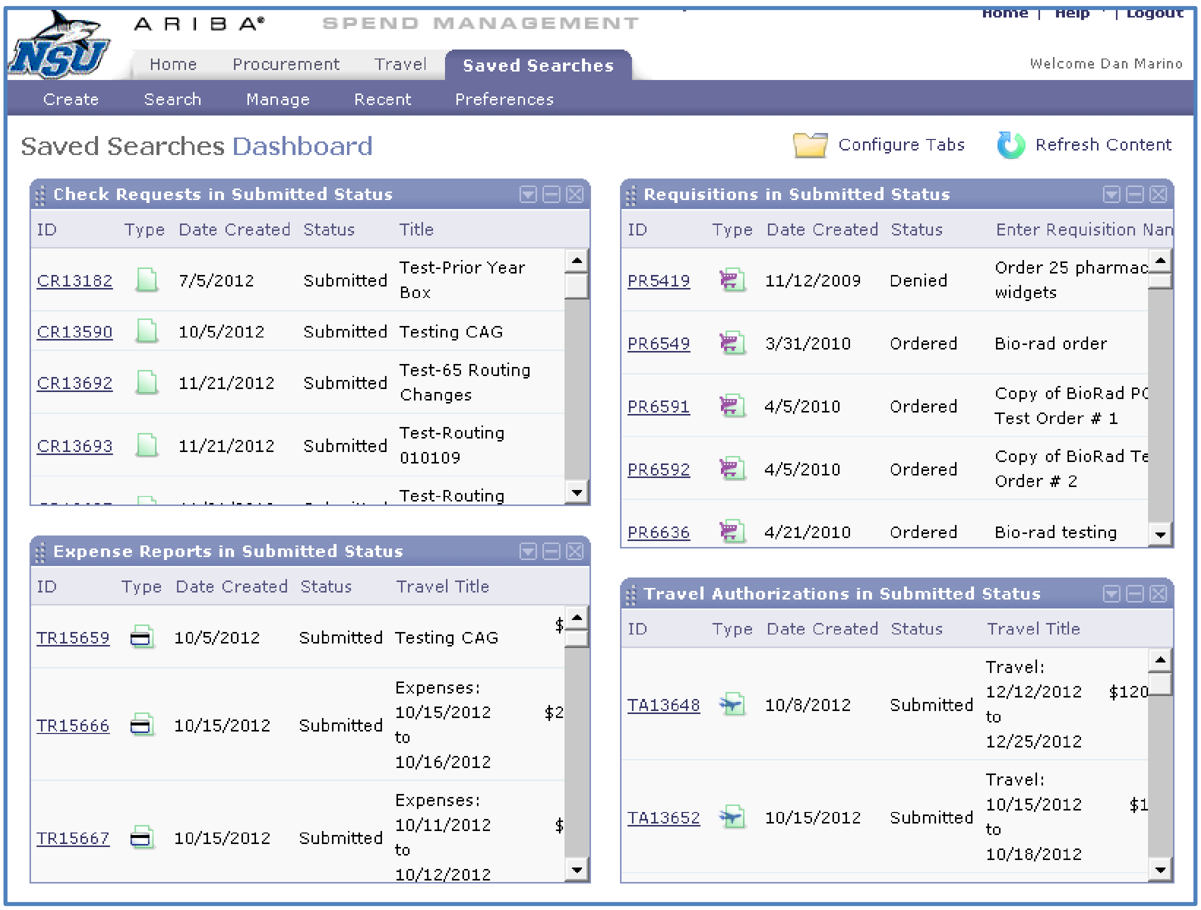




Choose the Saved Search that you would like to appear on your new tab:



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



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