

# SAP Ariba

**PROCUREMENT SERVICES DIVISION**



## **End-USER Training**

*P2P Core*

How to Create Analytical  
Reports and Add Reports to  
Dashboard

**The purpose of this job aid is to show how to customize a Prepackaged Report, save your changes, and add the data chart to the P2P dashboard.**

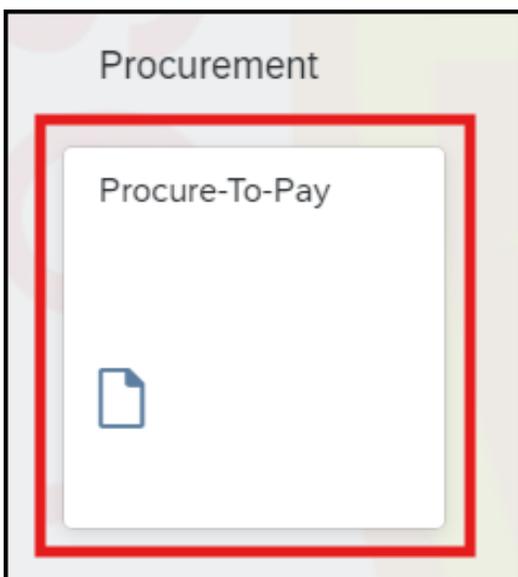
**1**

To access Ariba Guided Buying, log in to your ESS (<https://ess.lausd.net/>) using your SSO (Single Sign On).



**2**

Click on the **“Procure to Pay”** tile.



3

You will be directed to the Ariba P2P page.

The screenshot shows the LAUSD UNIFIED Ariba P2P interface. The top navigation bar includes 'HOME', 'CONTRACTS', 'PROCUREMENT' (highlighted), 'CATALOG', and 'MORE...'. On the right, there are 'Recent', 'Manage', and 'Create' dropdown menus. Below the navigation, there are search filters for 'Requisition' and 'Title', and an 'ID' field with a search button. A left sidebar contains 'Common Actions' with options like 'Create', 'Requisition', 'Sourcing Project', 'Sourcing Request', 'Contract Workspace (Procurement)', 'More', 'Management', 'Administration', 'My Tasks', 'Upload History', and 'More'. The main content area is divided into 'To Do' and 'My Documents' sections, both showing 'No items'.

4

Click **Create** → **Analytica Report**.

This close-up screenshot shows the 'Create' dropdown menu. The 'Create' button is highlighted with a red box. The dropdown menu is open, showing a list of options. 'Analytical Report' is highlighted with a red box. Other options include 'Compound Report', 'Contract Amendments/Renewals', 'Contract Request (Procurement)', 'Contract Request (Sales)', 'Contract Workspace (Internal)', 'Contract Workspace (Procurement)', 'Guided sourcing request', 'Invoice', 'Knowledge Project', 'Quick Quote Posting', 'Quick Survey', 'Requisition', and 'Supplier Request'.

5

You will be directed to the **Create Analysis** page.

LAUSD UNIFIED

HOME SOURCING CONTRACTS **SUPPLIER MANAGEMENT** MORE...  
Recent Manage Create

Create Analysis Report3780259 - Untitled Analytical Report Next Exit

Enter a title for your report, select a data source to investigate from the **Main Fact** pull-down menu, and add at least one data field to the **Data** area of the pivot layout. [More](#)

1 Source Data  
2 Pivot Layout  
3 Refine Data

Title: \*

Description:

Report Currency:

Data Sources

Main Fact: \*

Second Fact:

Third Fact:

Available Measures

Pre-defined

Adjusted Amount (USD)

Amount (USD)

Page Fields

Column Fields

6

**Enter the Report Title and the Description.**

HOME SOURCING CONTRACTS **SUPPLIER MANAGEMENT** MORE...  
Recent Manage Create

Create Analysis Report3779895 - Untitled Analytical Report

Enter a title for your report, select a data source to investigate from the **Main Fact** pull-down menu, and add a

1 Source Data  
2 Pivot Layout  
3 Refine Data

Title: \*

Description:

Report Currency:

Data Sources

Main Fact: \*

Second Fact:

Third Fact:

Available Measures

Pre-defined

Adjusted Amount (USD)

Amount (USD)

Page Fields

Column Fields

7

## Choose the **Main data source**.

Create Analysis Report3779895 - Untitled Analytical Report Next Exit

Enter a title for your report, select a data source to investigate from the **Main Fact** pull-down menu, and add at least one data field to the **Data** area of the pivot layout. [More](#)

1 Source Data  
2 Pivot Layout  
3 Refine Data

Title: \* Purchase Order Analytical Report  
Description: Purchase Order Spend  
Report Currency: User Preference

Data Sources

Main Fact: \* Advance Payment  
Second Fact: Approvals (Contract)  
Third Fact: Approvals (Invoice)  
Approvals (Prereconciled Invoice)  
Approvals (Receipt)  
Approvals (Requisition)  
Approvals (Service Sheet)  
Attendees  
Budget  
Business Contact

Available Measures

Pre-defined  
Adjusted Amount (USD)  
Amount (USD)

Page Fields  
Column Fields

8

In this example, we will use **Purchase Order**. This means that the first data element in our report is going to be purchase order data.

Data Sources

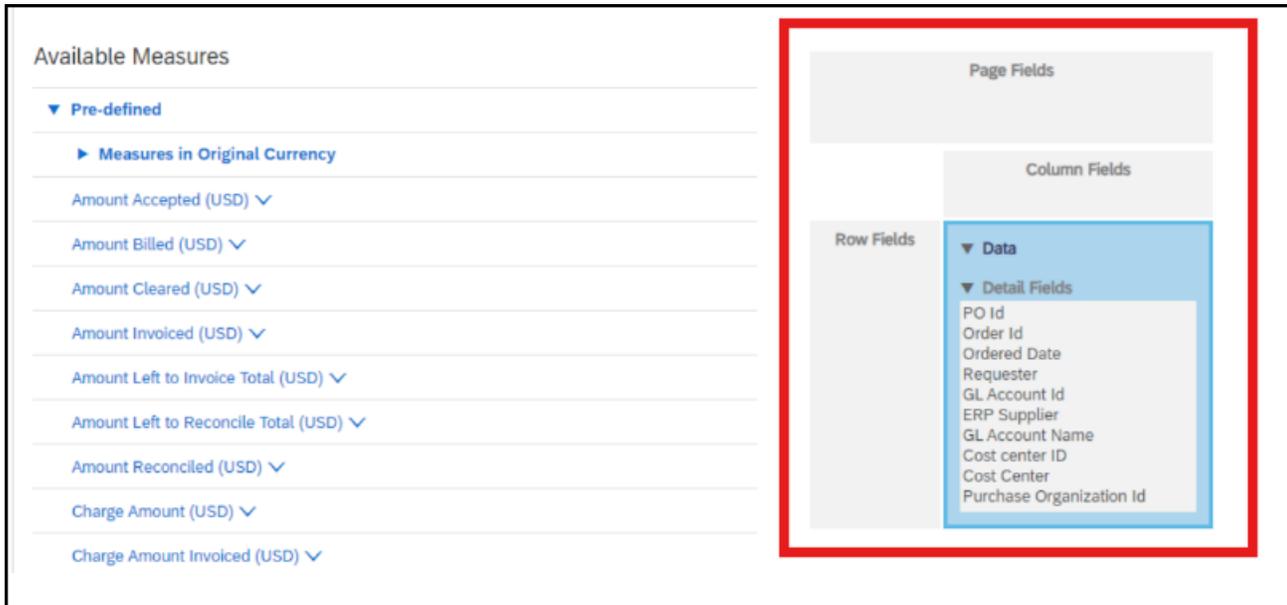
Main Fact: \* Advance Payment  
Second Fact: Prereconciled Invoice  
Third Fact: Project  
Project Group  
Project Task  
Proposal

Available Measures

Pre-defined  
Purchase Order

# 9

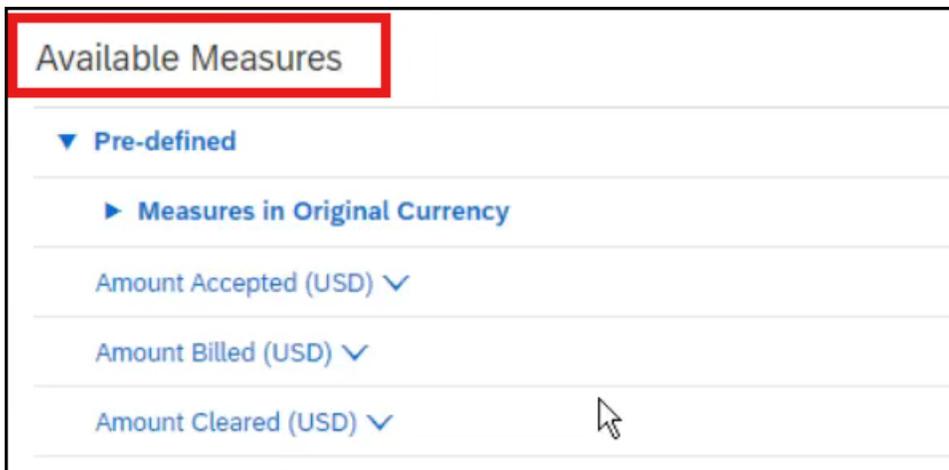
The Available Measure will auto-populate to the right in the pivot table.



The image shows two parts of a software interface. On the left is a list titled "Available Measures" under a "Pre-defined" category, with "Measures in Original Currency" expanded. It lists various financial metrics such as "Amount Accepted (USD)", "Amount Billed (USD)", "Amount Cleared (USD)", "Amount Invoiced (USD)", "Amount Left to Invoice Total (USD)", "Amount Left to Reconcile Total (USD)", "Amount Reconciled (USD)", "Charge Amount (USD)", and "Charge Amount Invoiced (USD)". On the right is a pivot table field list with sections for "Page Fields", "Column Fields", and "Row Fields". The "Data" section is expanded, showing "Detail Fields" which include "PO Id", "Order Id", "Ordered Date", "Requester", "GL Account Id", "ERP Supplier", "GL Account Name", "Cost center ID", "Cost Center", and "Purchase Organization Id". A red box highlights the pivot table field list.

# 10

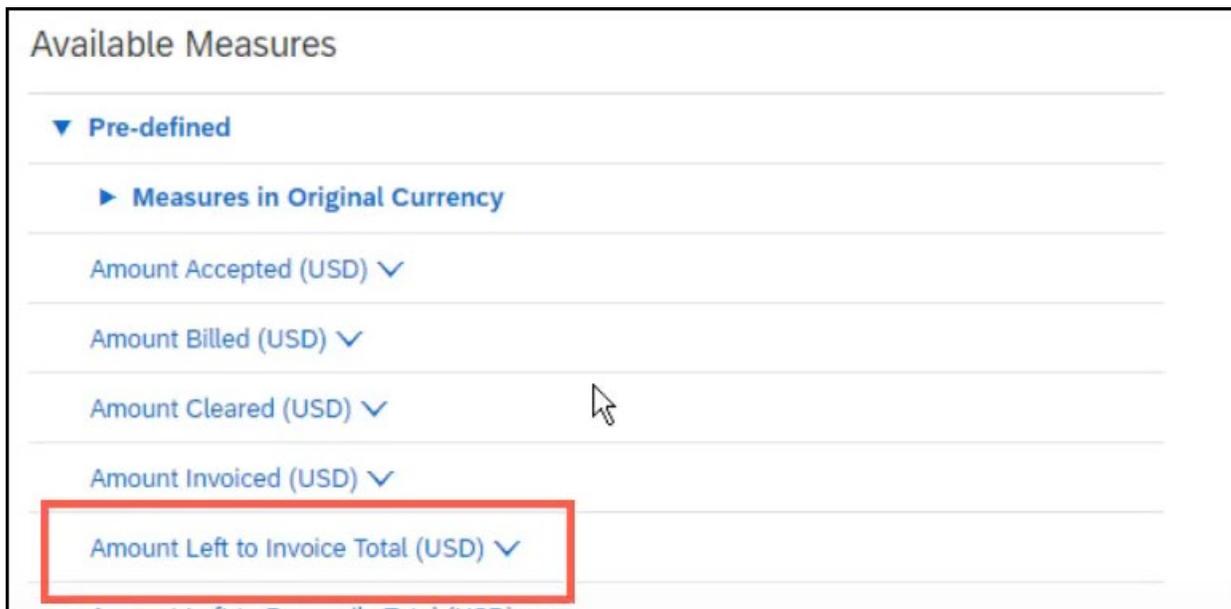
To further customize your report, you can add **measures**. **Measures** are numerical values calculated based on the data you've already selected. This allows you to incorporate additional insights and analysis into your report.



This is a close-up of the "Available Measures" list. The title "Available Measures" is highlighted with a red box. Below it, the "Pre-defined" category is expanded to show "Measures in Original Currency". The list includes "Amount Accepted (USD)", "Amount Billed (USD)", and "Amount Cleared (USD)", with a mouse cursor pointing at the bottom of the list.

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For example, if you want to display the total balance that still needs to be invoiced, you would include the **Amount Left to Invoice Total** in your report.



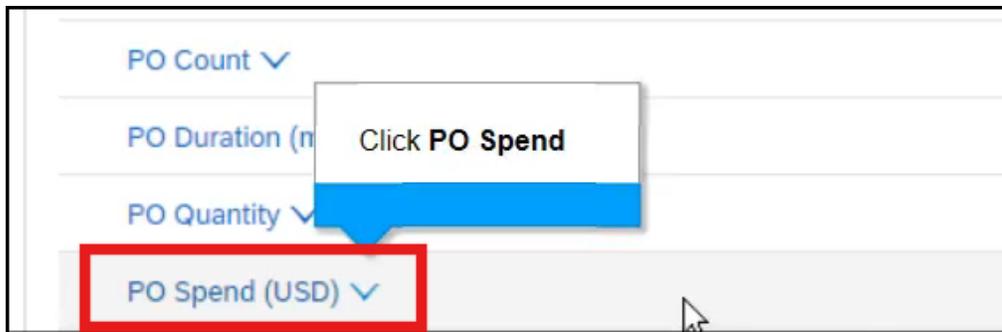
12

Drag the label to the blue area in the pivot table.



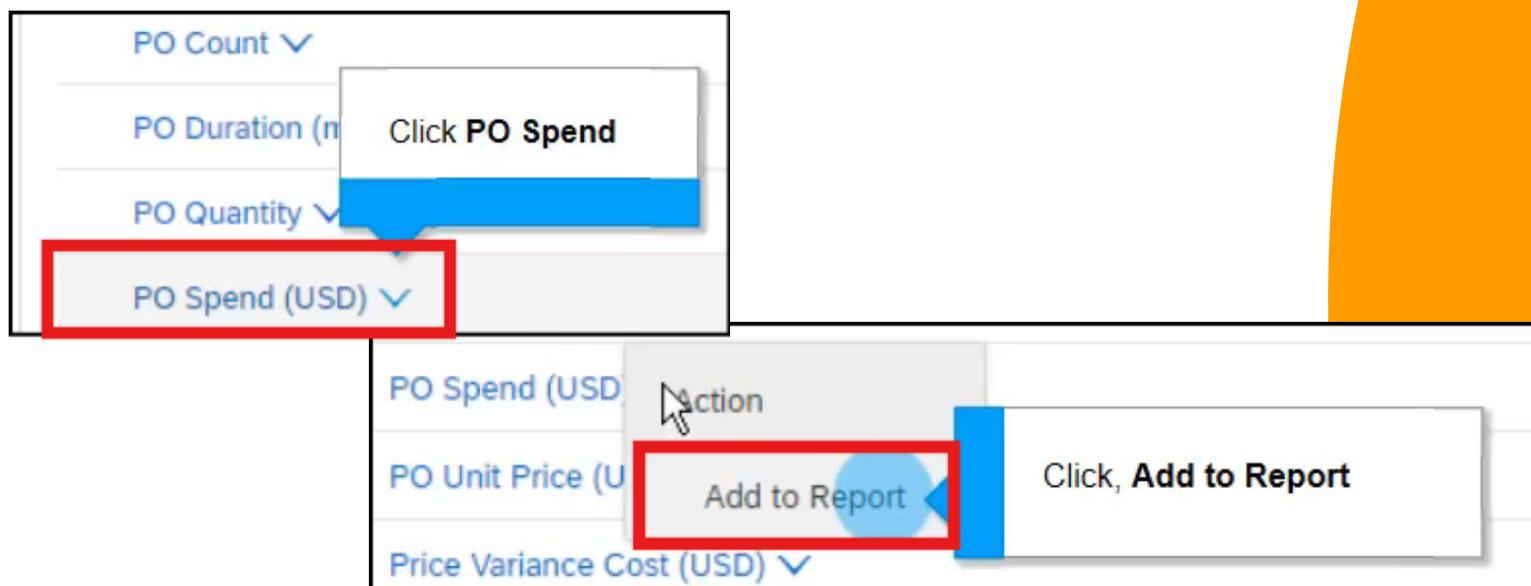
# 13

In this example, we'll demonstrate how to create a report that provides a breakdown of purchase order spending and associated tax amounts within a particular time period. For more customization options, explore the available measures.



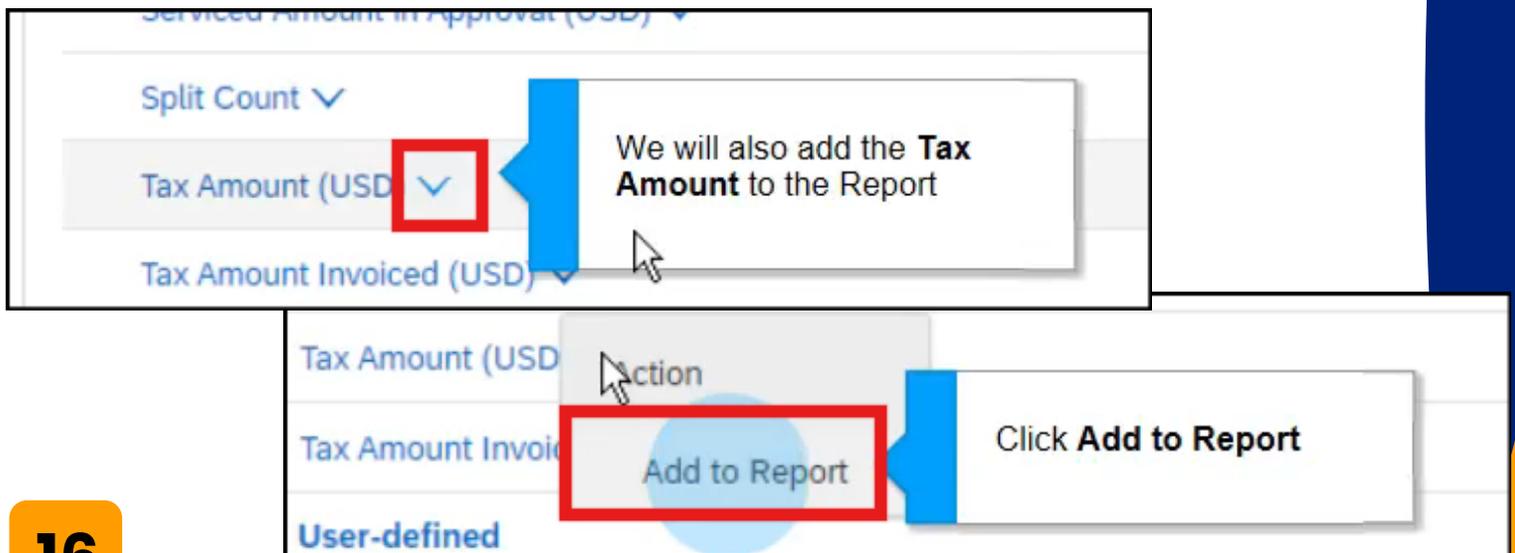
# 14

Click the **PO Spend** drop-down arrow → **Add to Report.**



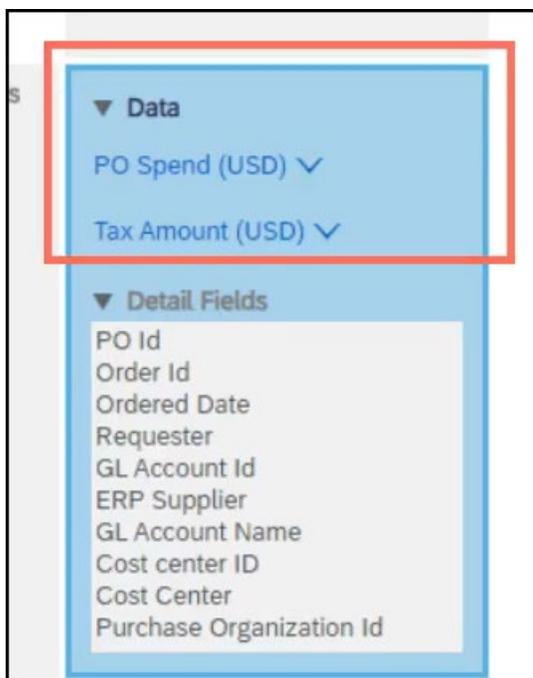
15

Add any other relevant measures to your report. In this example, we are adding a **Tax Amount**. Click the drop-down arrow → **Add to Report**.

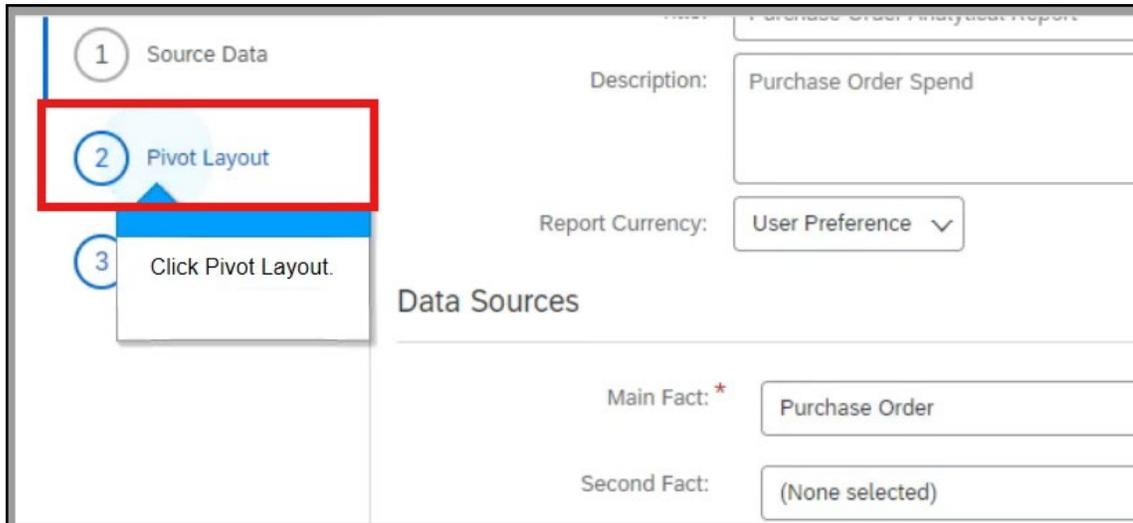


16

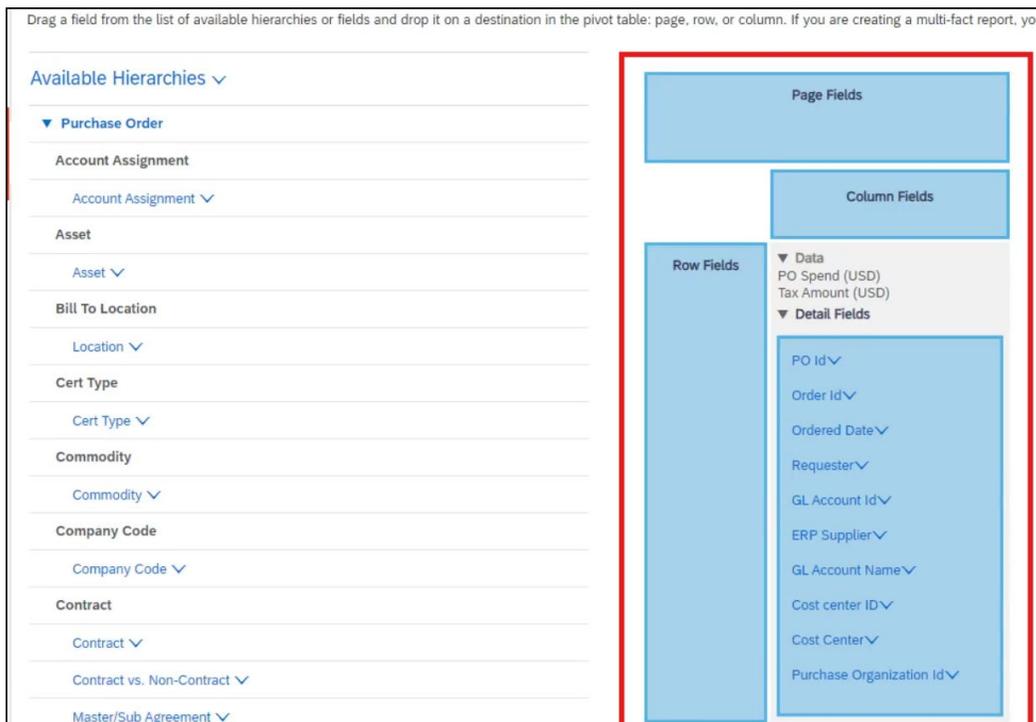
The measure you just added will now appear under the “**Data**” section of the pivot table



Scroll up. Click **Pivot Layout**.



We're now on the second tab of this report. Active fields are highlighted in blue.



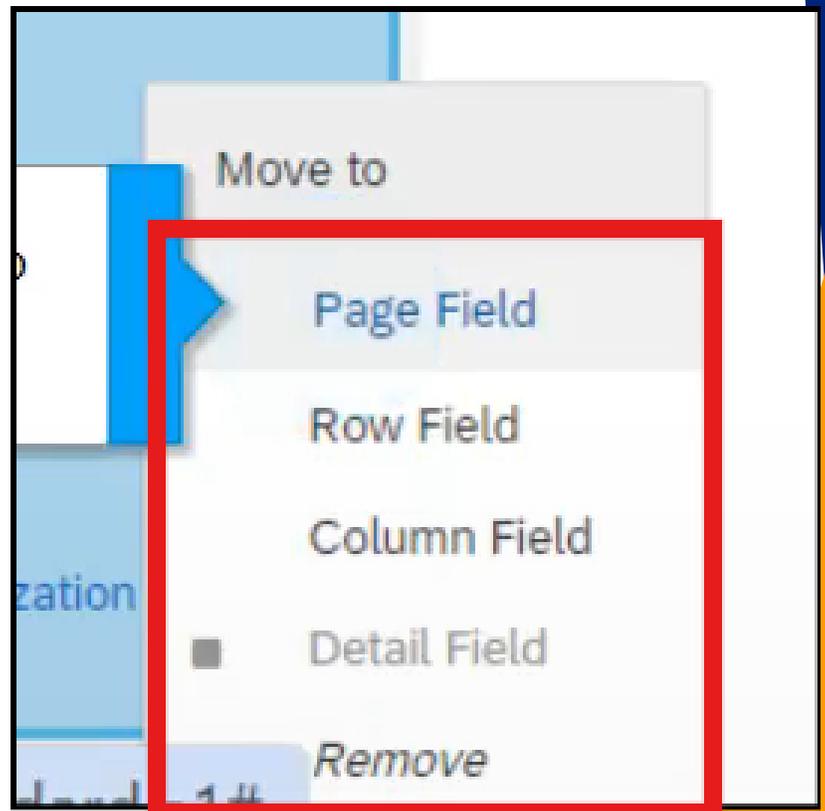
Pivot table consists of page, row, column, and detailed fields. When customizing your pivot table, you can use hierarchies for multi-level data breakdowns or fields for single-level data points.

For example, commodity code is a hierarchy. It has four levels, starting from a broad category (level 1) and becoming increasingly specific down to level 4.

An available field represents a single level of data.

To customize your pivot table, drag and drop any available fields or hierarchies (multi-level categories) into the designated blue areas.

You can move measure within the pivot table by dragging and dropping them or clicking on them and selecting a new field. For example, click the **measure** → choose the field you want to move it to.



Once you've finished customizing your pivot table, click **Next**.

The screenshot shows a pivot table customization interface. At the top, there are three buttons: "Previous", "Next", and "Exit". The "Next" button is highlighted with a red box. Below the buttons, there is a tooltip that says "Go to next step". The main area is divided into four sections, each highlighted with a red box:

- Page Fields:** Contains "Purchase Organization Id" with a dropdown arrow.
- Column Fields:** Contains "Order Id" with a dropdown arrow.
- Row Fields:** Contains "Cost Center" with a dropdown arrow.
- Data and Detail Fields:** Contains a list of fields under two sections:
  - Data:** "PO Spend (USD)", "Tax Amount (USD)".
  - Detail Fields:** "PO Id", "Ordered Date", "Requester", "GL Account Id", "ERP Supplier", "GL Account Name", "Cost center ID".

At the bottom left, there is a checkbox labeled "Show detail fields in report." which is currently unchecked.

Review and adjust the “**Refine Data**” section to meet your specific needs.

For example, you can set a custom date range for the report.

Filter the data in your report by selecting values for the fields below. All reports include a date field filter. To select a different date field

Ordered Date (Calendar): \*  Relative date range

Time period: Year(s) ▾

Most recent 2 ▾ time periods

Future 0 ▾ time periods

Include current partial year

Fixed date range from: 1/1/2023  to: 12/31/2024 

Advanced Options

Purchase Organization Id: (All) ▾

You have the flexibility to either include all your purchasing organizations or select specific ones for your report.

Advanced Options

Purchase Organization Id: (All) ▾





The cost center menu will expand.

The screenshot displays a software interface with a left-hand menu and a right-hand panel. The left-hand menu is titled "Cost Center (all)" and lists several options. A blue arrow points to the "BELL SH" option, which is highlighted with a blue border. Below it, "Region East" is also highlighted, and a mouse cursor is hovering over it. The right-hand panel is titled "Sort row fields:" and contains several options: "Descending", "Ascending", "Move Field", "Left", "Right", "Show Field On", "Rows", "Columns", "Page", and "Detail".

Expand Next Level	Sort row fields:
At lowest level	Descending
Select Level, Values:	Ascending
Cost Center (all)	Move Field
BELL SH	Left
Unclassified	Right
NORTHRIDGE MS	Show Field On
BSD-Gen Stores Whse	Rows
Fed&State Ed Prog Br	Columns
Region East	Page
Superintendent's Ofc	Detail
BELMONT SH	
ITS-IT Support Serv	
WASHINGTON PREP SH	
Select Others...	
Select Search Filter...	

For this example, we select "Bell SH" as the filter to generate a report specific to this school

The report is now filtered to show data for Bell SH.

Applied Filters

- 8,540,646.09 Ordered Date Spanning: most recent 2 Year(s)

Display Options Edit  
Min/Max rows: 3/8

Detail View ▾

Cost Center	PO Id	Ordered Date	Requester	GL Account Id	ERP Supplier	GL Account Name	Cost center ID	PO Spend (USD) ↓	Tax Amount (USD)
Total								8,540,646.09	408,761.42
BELL SH ▾	EP893 ▾	5/14/2024	Siva Kondubhatla	0000580020	Namaste Wellness Enterprises	Software License Maintenance	0001853601	200,000.00	0.00
	EP1186 ▾	5/24/2024	Jennie Ngo	0000430001	Appealing Practices	General Supplies	0001853601	90,000.00	0.00
	EP248 ▾	2/12/2024	Siva Kondubhatla	0000430001	Cosmic Manifestation	General Supplies	0001853601	86,500.00	0.00
	EP249 ▾	2/12/2024	Subhash Karipi	0000430001	Cosmic Manifestation	General Supplies	0001853601	86,500.00	0.00
	EP250 ▾	2/12/2024	Siva Kondubhatla	0000430001	Cosmic Manifestation	General Supplies	0001853601	86,500.00	0.00

Click on the **Chart** tab.

Reporting Purchase Order Analytical Report

Edit Save... Export Actions

Field Browser

Page Others

Pivot table **Chart** Dashboard

Click the **Chart** tab.

Order Id

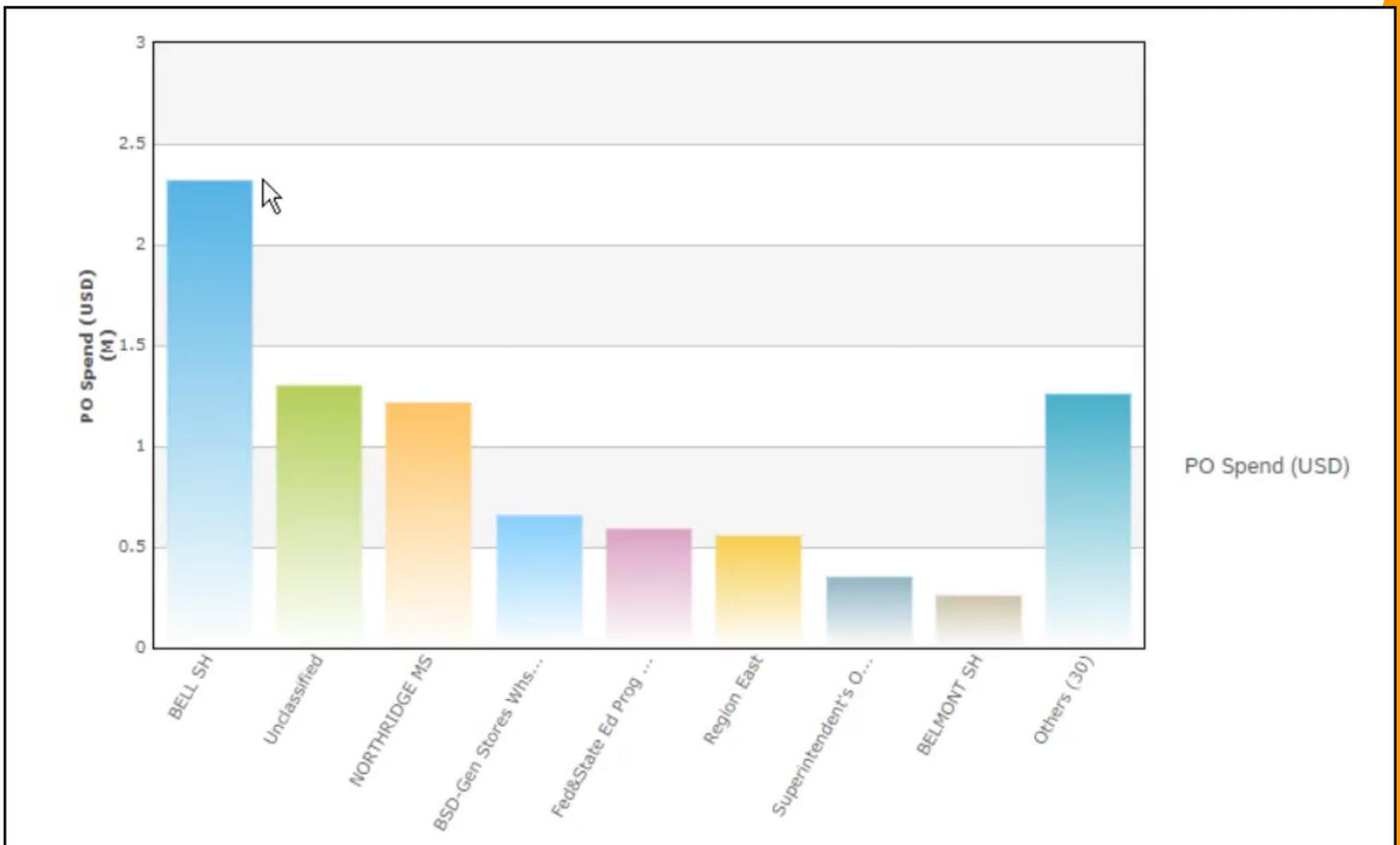
Purchase Organization Id

Date Spanning: most recent 2 Year(s)

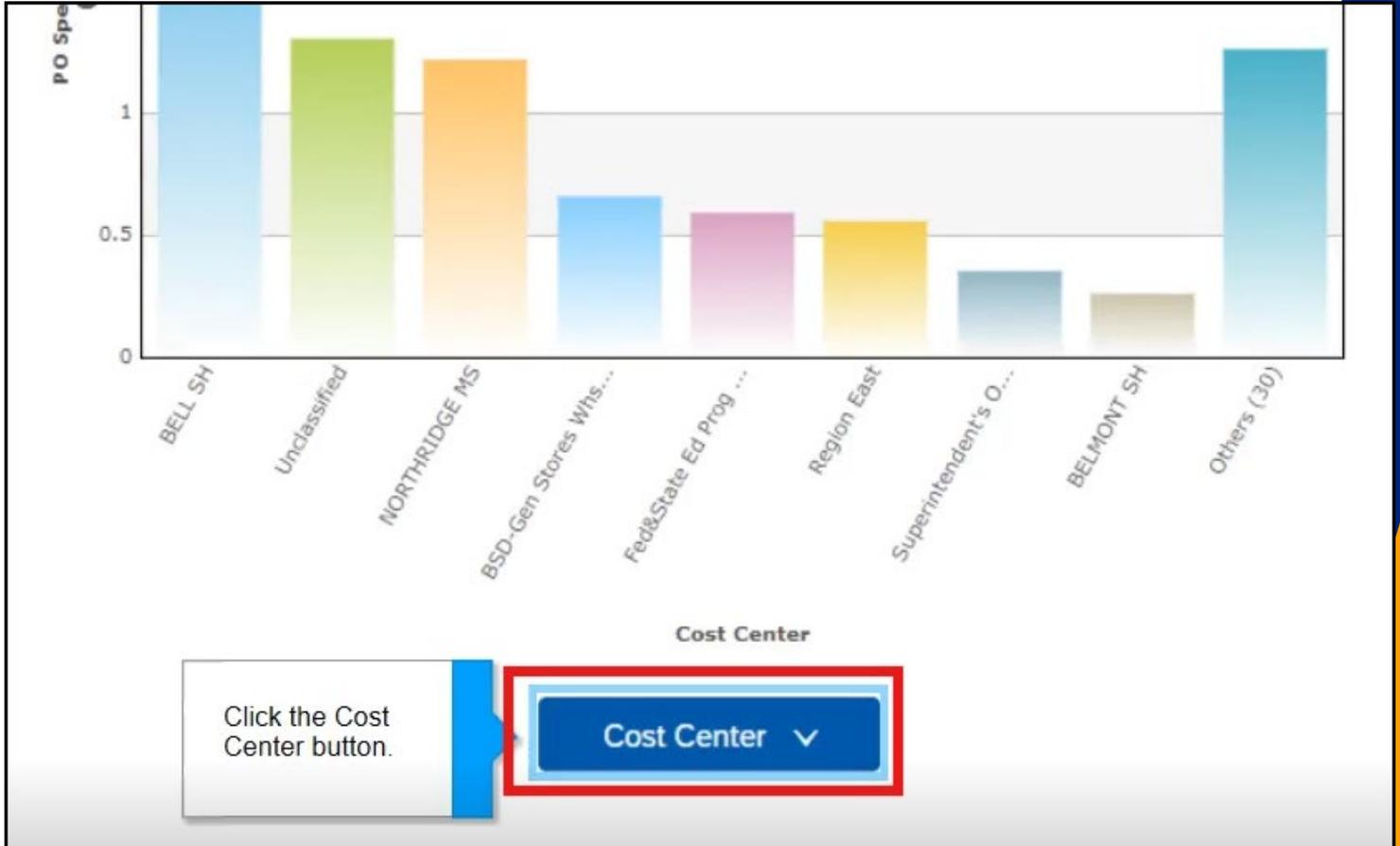
Display Options Edit Min/Max rows: 3/8

Detail View

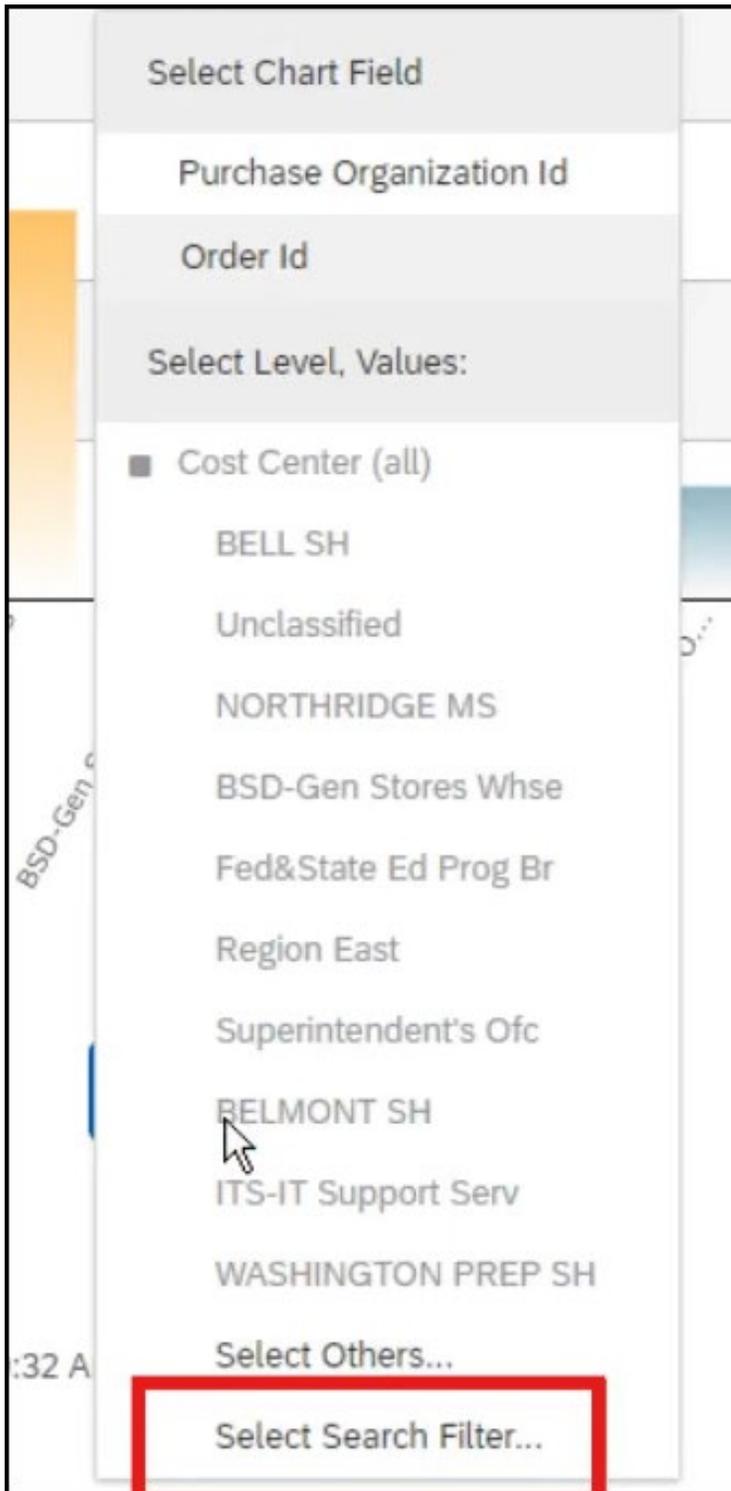
A column chart has been automatically generated to provide a visual representation of purchase order spending categorized by Cost Center.



Scroll down → click **Cost Center**.



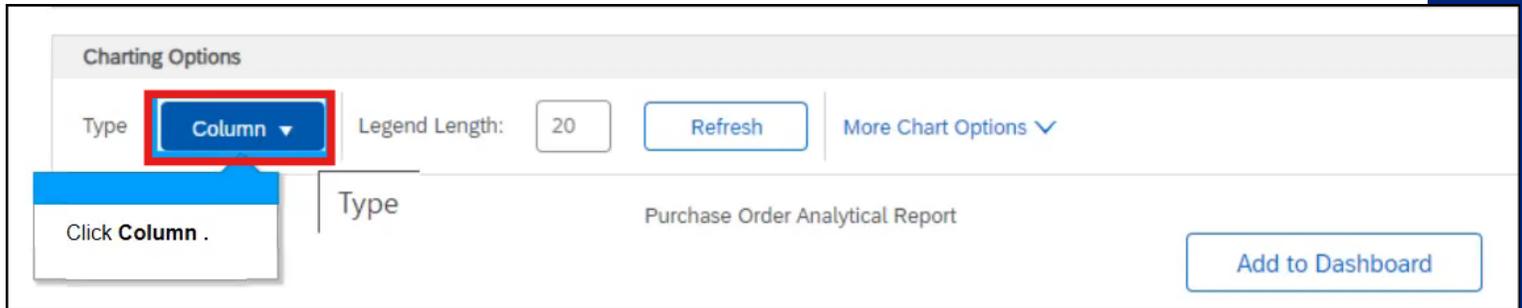
This menu allows you to change the details of this graph.



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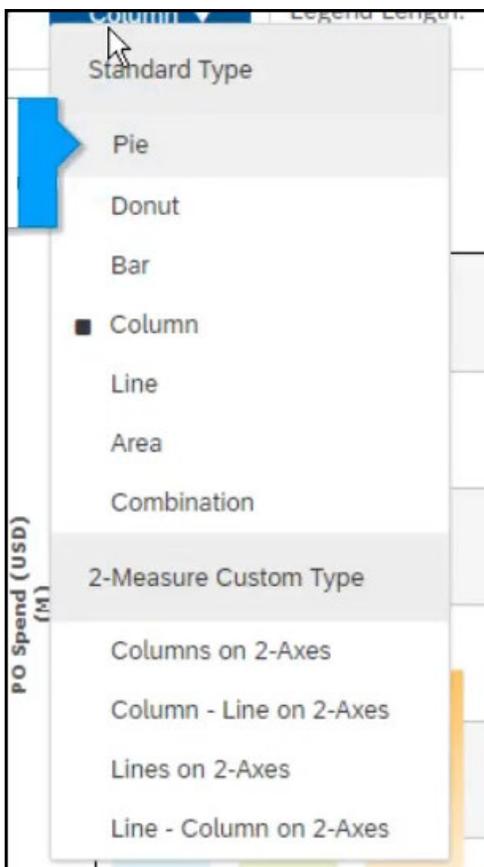
Charting Options Type allows us to change the type of graph.

Click **Column**.



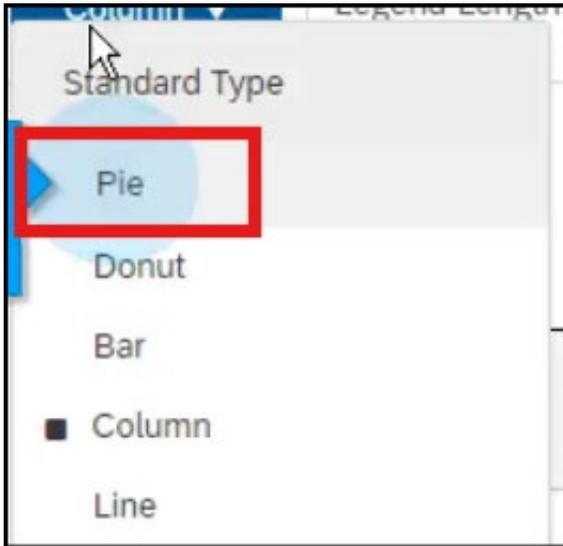
34

There are many graph types to choose from.



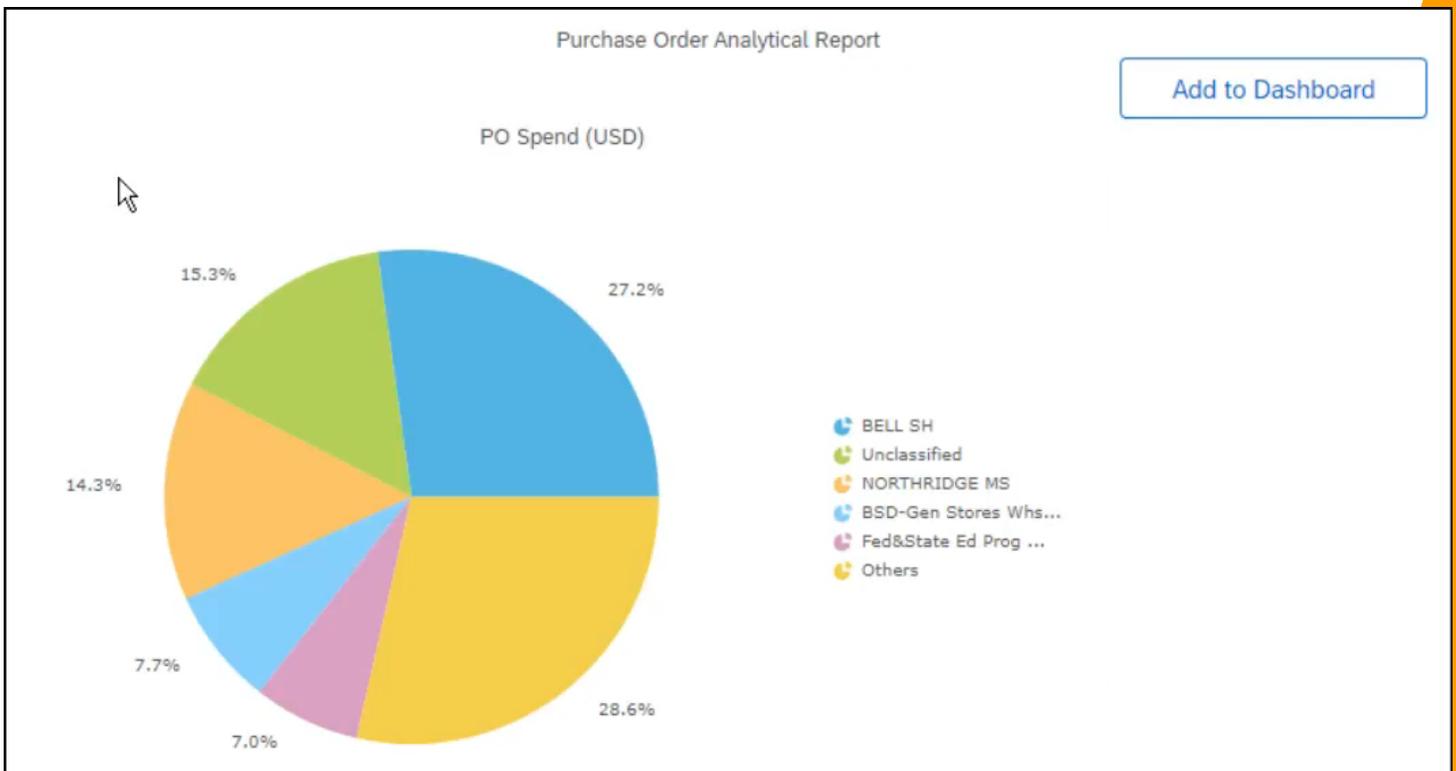
35

In this example, we will click **Pie**.



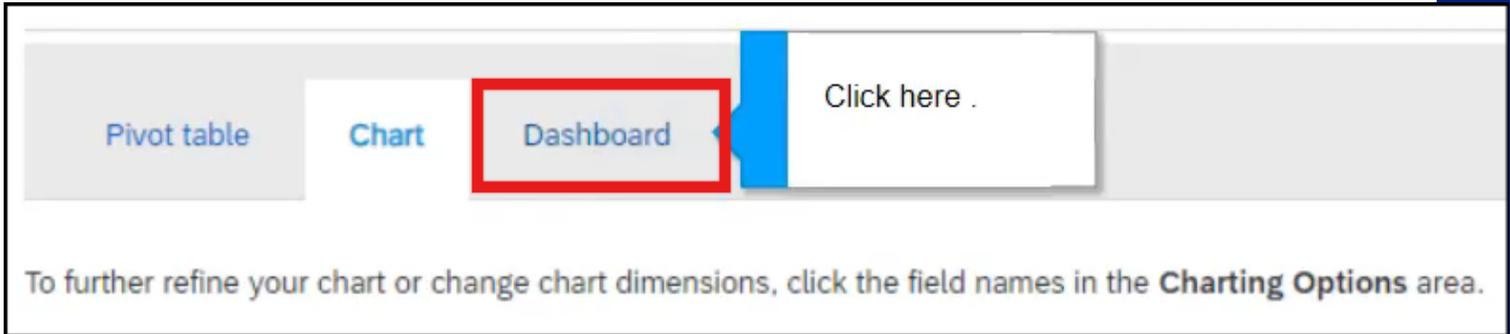
36

A pie graph will be generated to visually represent the pivot table.



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Click on the **Dashboard** tab.



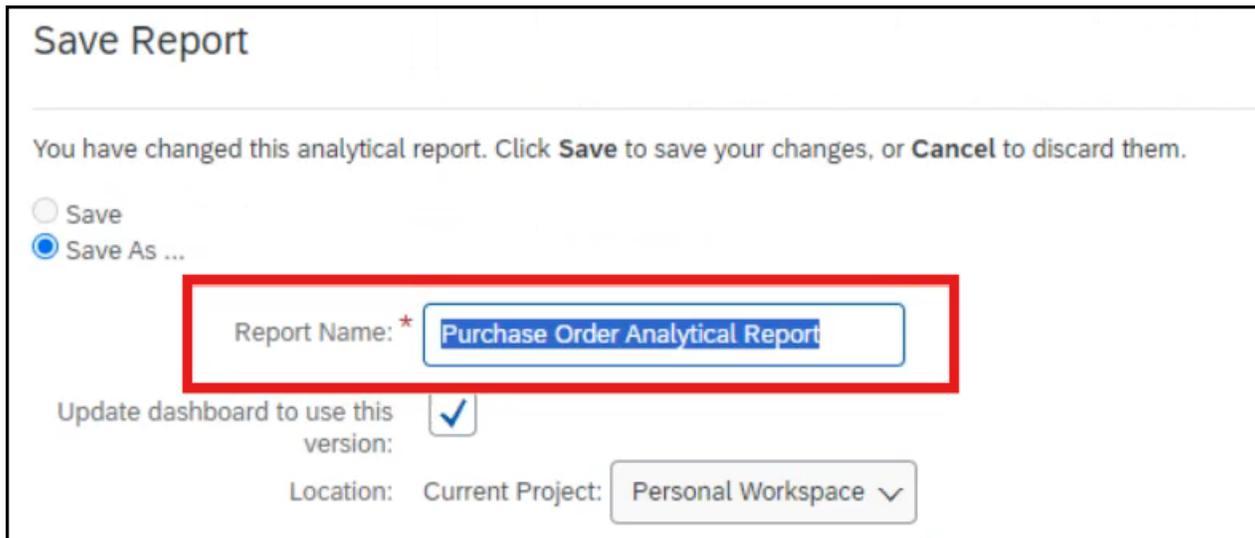
38

You have the option to add the pivot table, a pie chart, or any other desired graphs to your dashboard.

Click **Add to Dashboard**.



## Enter the **Report Name**.



Save Report

You have changed this analytical report. Click **Save** to save your changes, or **Cancel** to discard them.

Save  
 Save As ...

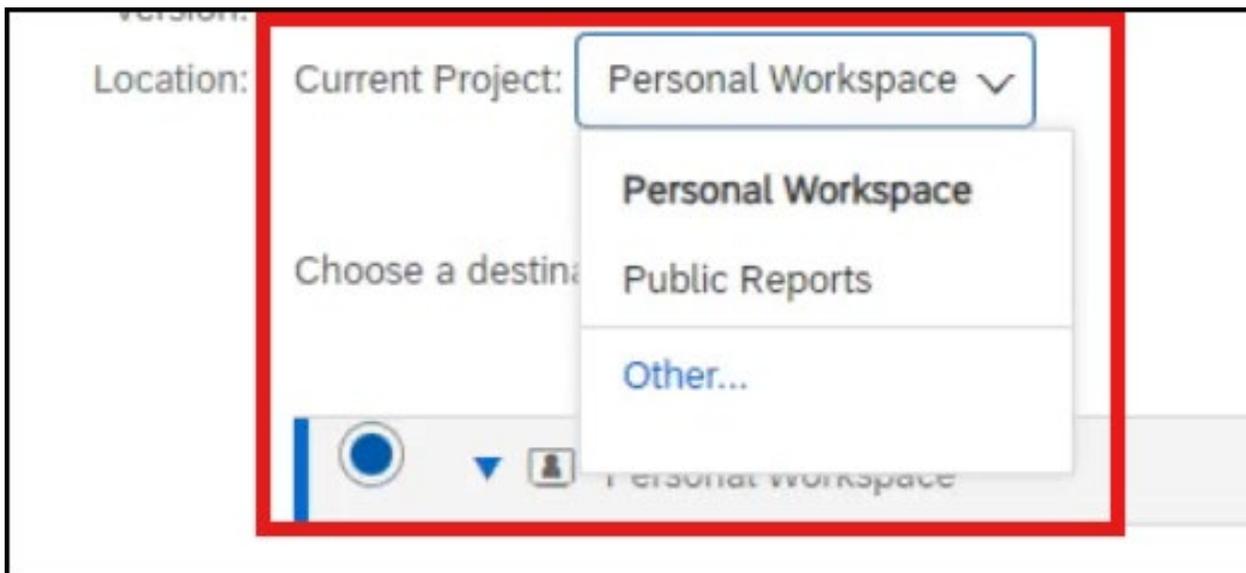
Report Name: \*

Update dashboard to use this version:

Location: Current Project:

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Choose the appropriate project folder to save your report. If you save it to your personal workspace, only you will have access. If you save it as a public report, it will be visitable to all users with the necessary permissions.



Location: Current Project:

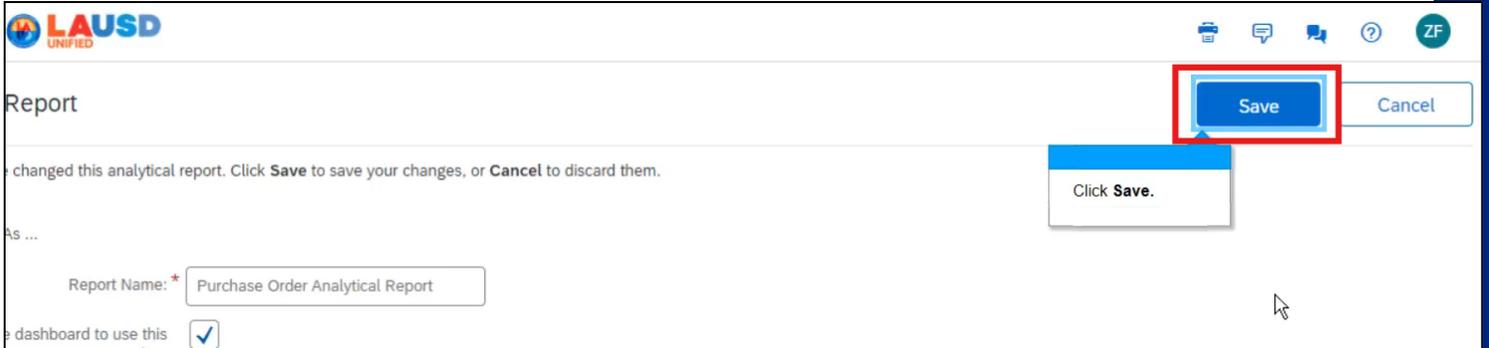
Choose a destination:

- Personal Workspace
- Public Reports
- Other...

Personal workspace

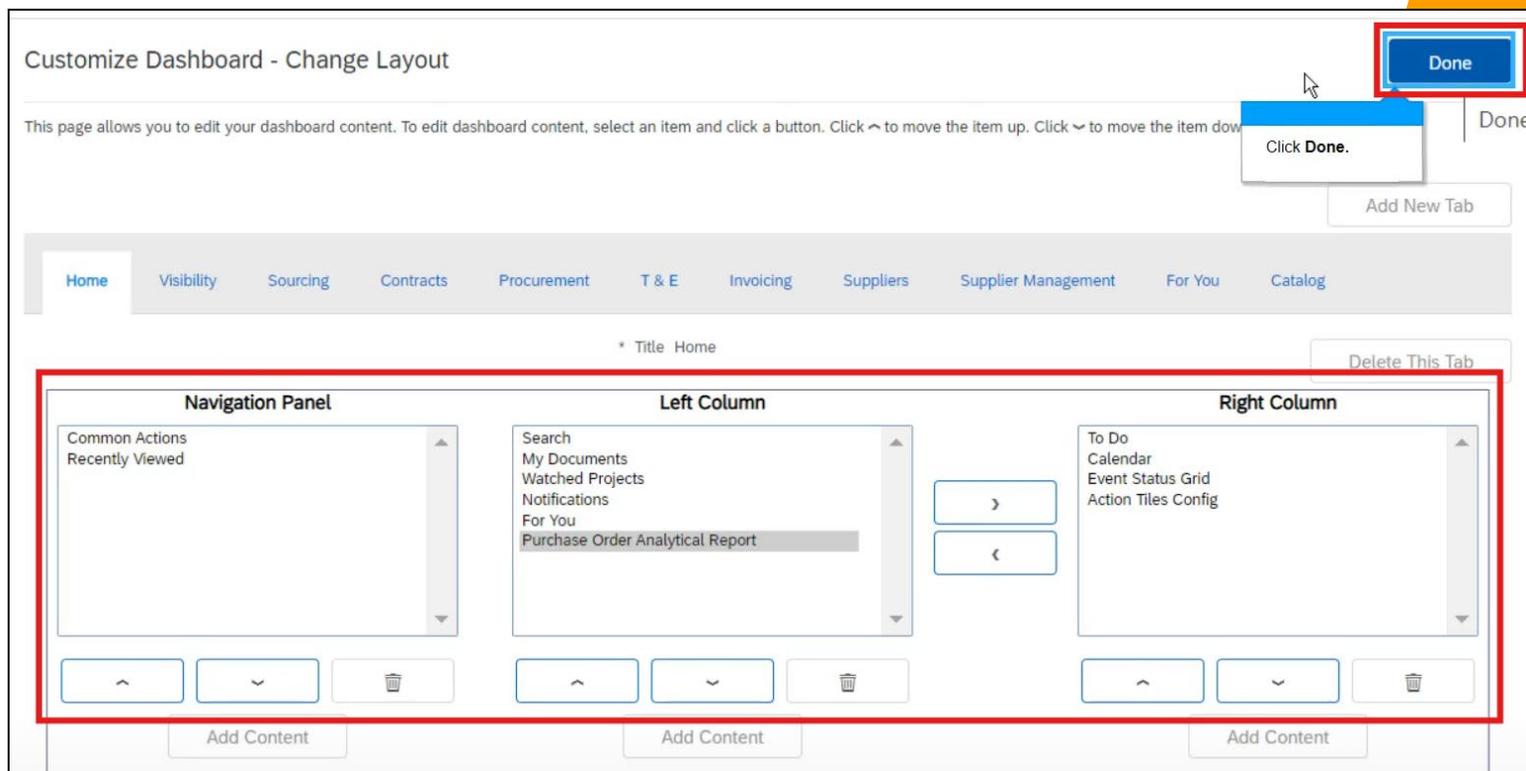
41

Click **Save**.



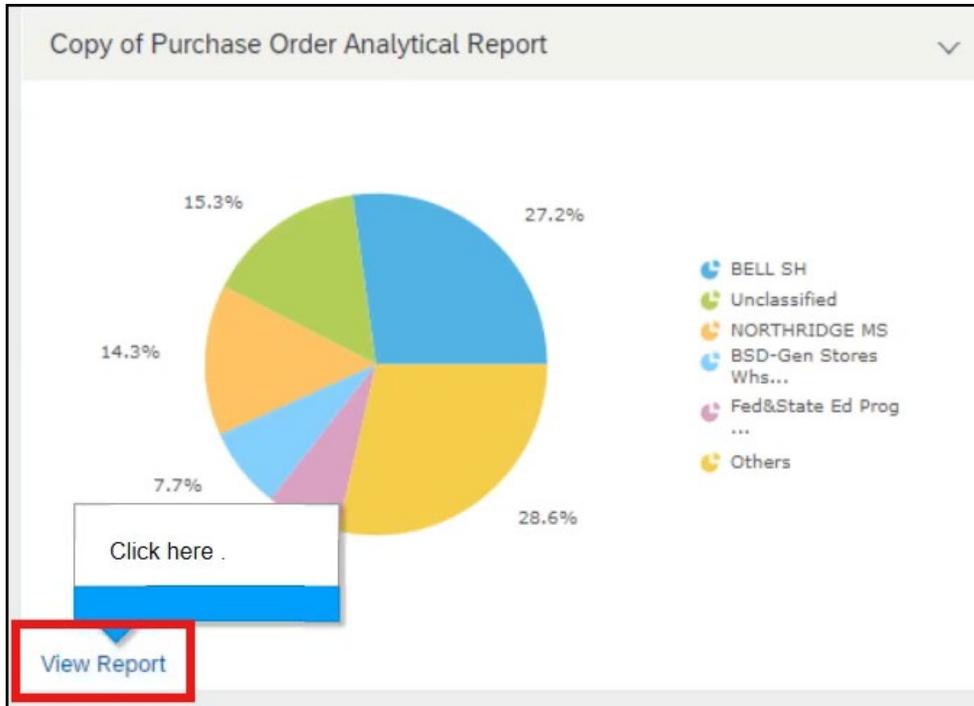
42

Select the desired placement for the graph on your home screen. After publishing, you can reposition the graph within the dashboard. Click **Done**.



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Go to your Dashboard. You can edit the graph by clicking **View Report**.



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Click **Edit**. Clicking edit will bring you back to the pivot table to allow changes to the report.

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Reporting Copy of Purchase Order Analytical Report

Edit Save... Export Actions

Field Browser

Page Others

Order Id

Pivot table Chart Dashboard

Applied Filters

8,540,646.09 Ordered Date Spanning: most recent 2 Year(s)

Display Options Edit Min/Max rows: 3/8