# SAP Ariba

**PROCUREMENT SERVICES DIVISION**

## End-USER Training

*P2P Core*
How to Create Analytical Reports and Add Reports to Dashboard

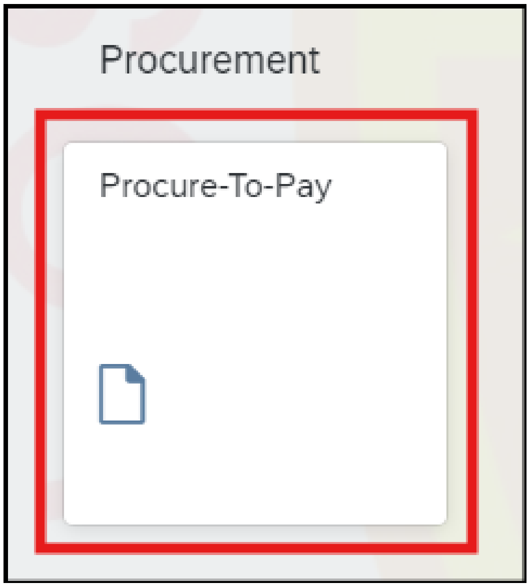
## The purpose of this job aid is to show how to customize a Prepackaged Report, save your changes, and add the data chart to the P2P dashboard.

**1**

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

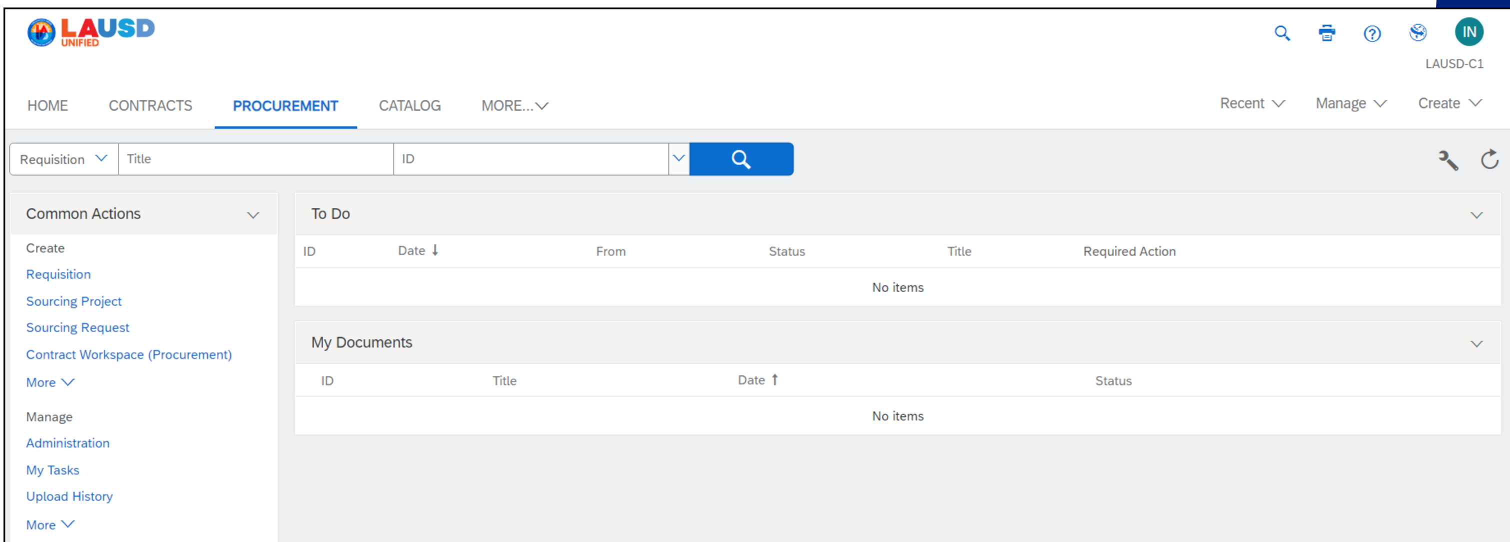

**2**

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



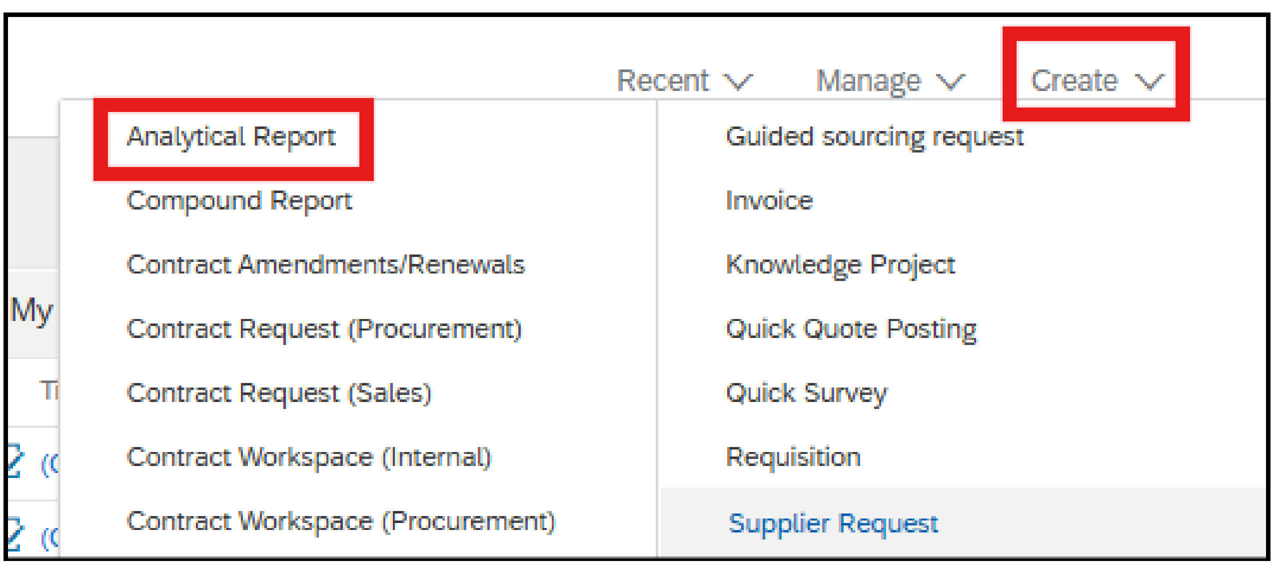
**3**

You will be directed to the Ariba P2P page.



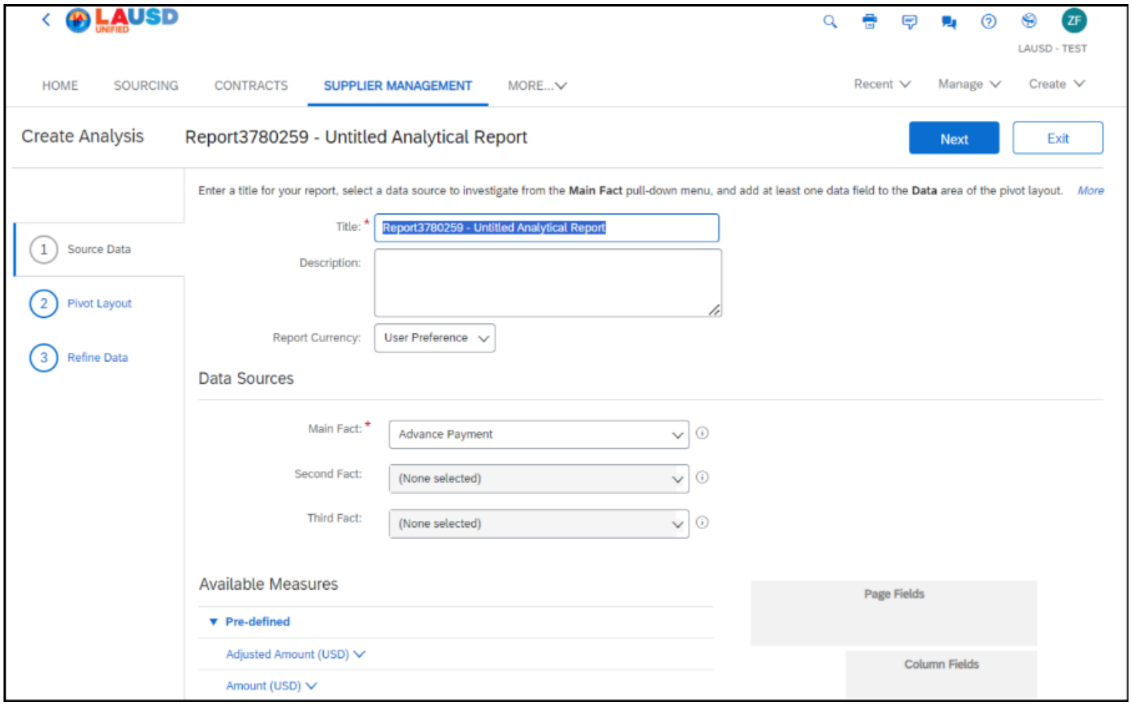

**4**

Click **Create → Analytica Report**.



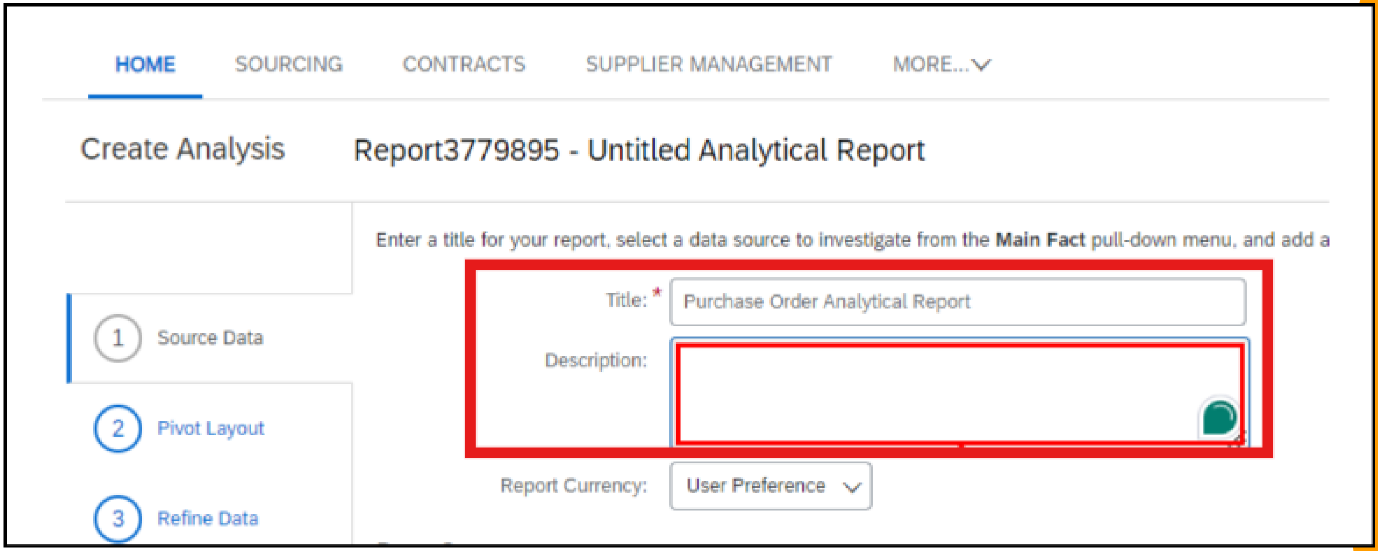
# 5

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



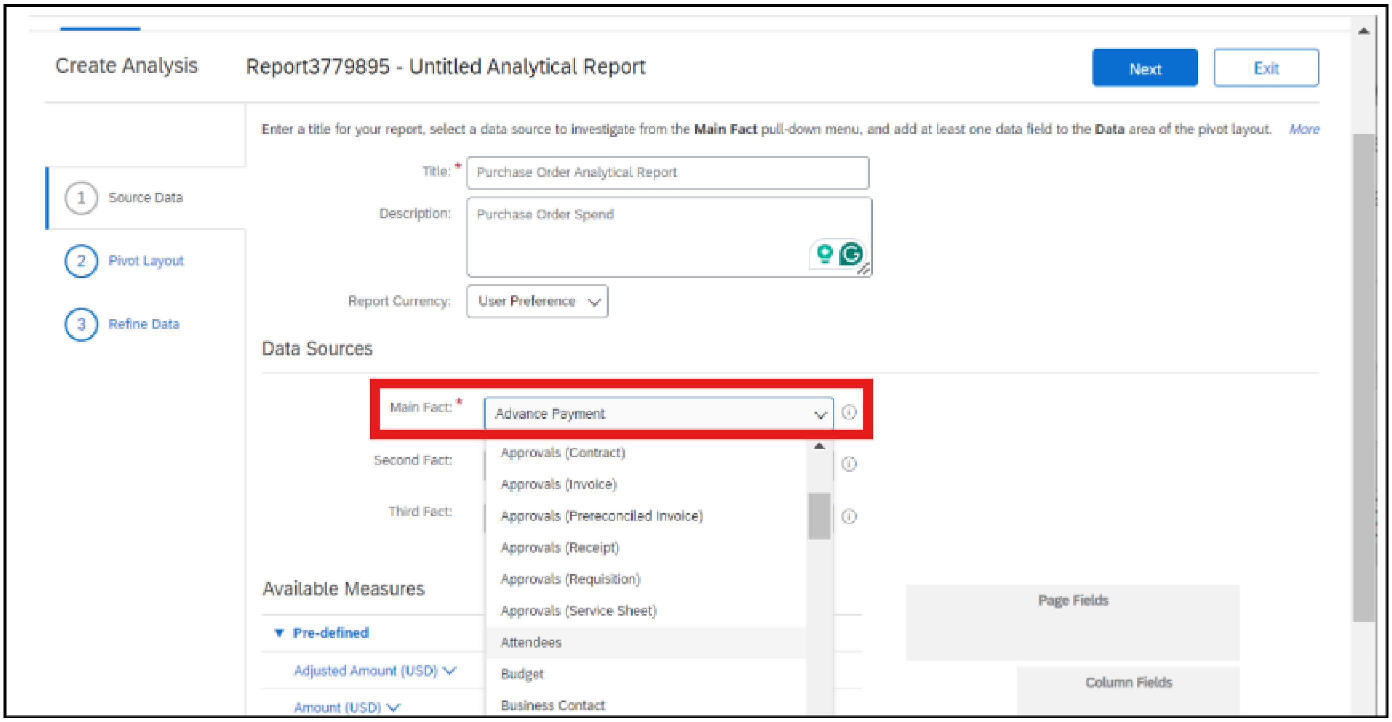

# 6

## Enter the Report Title and the Description.



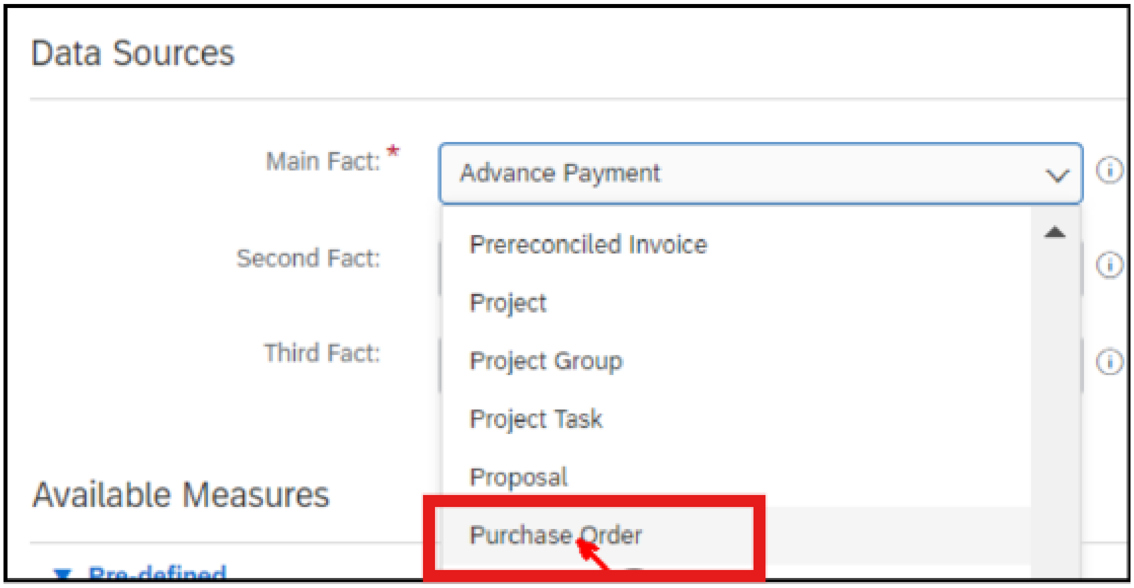
**7**

Choose the **Main data source**.



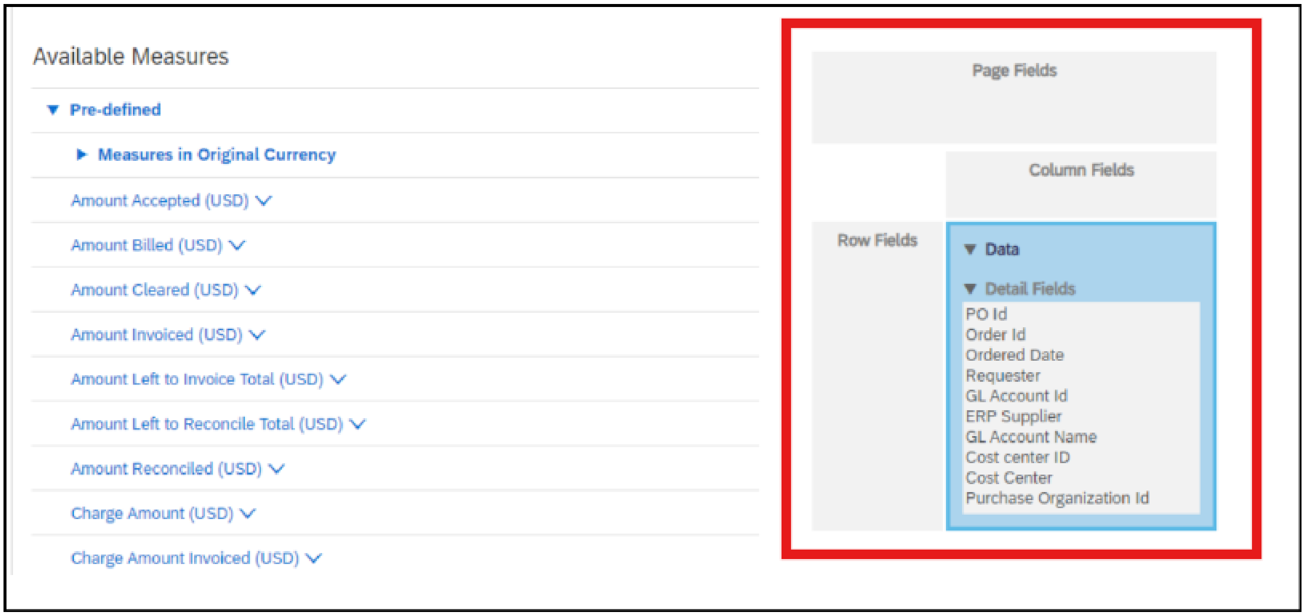

**8**

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.



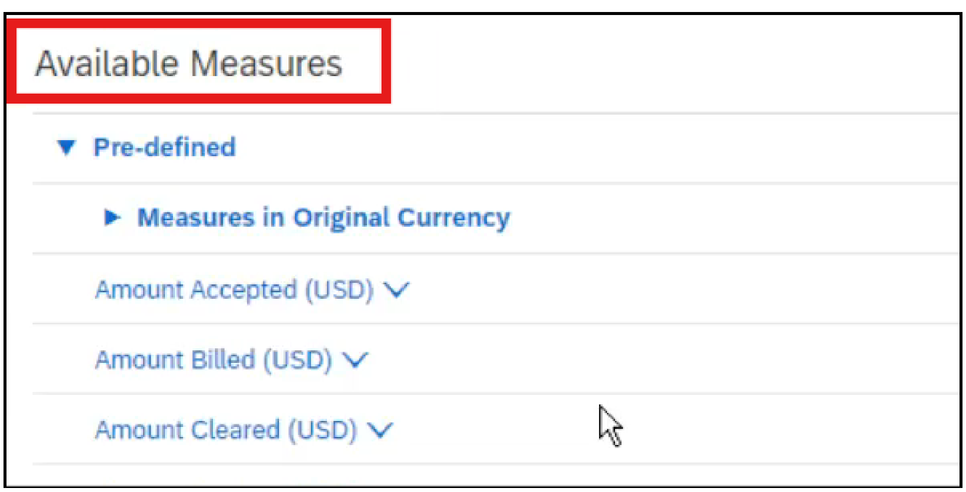
**9**

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



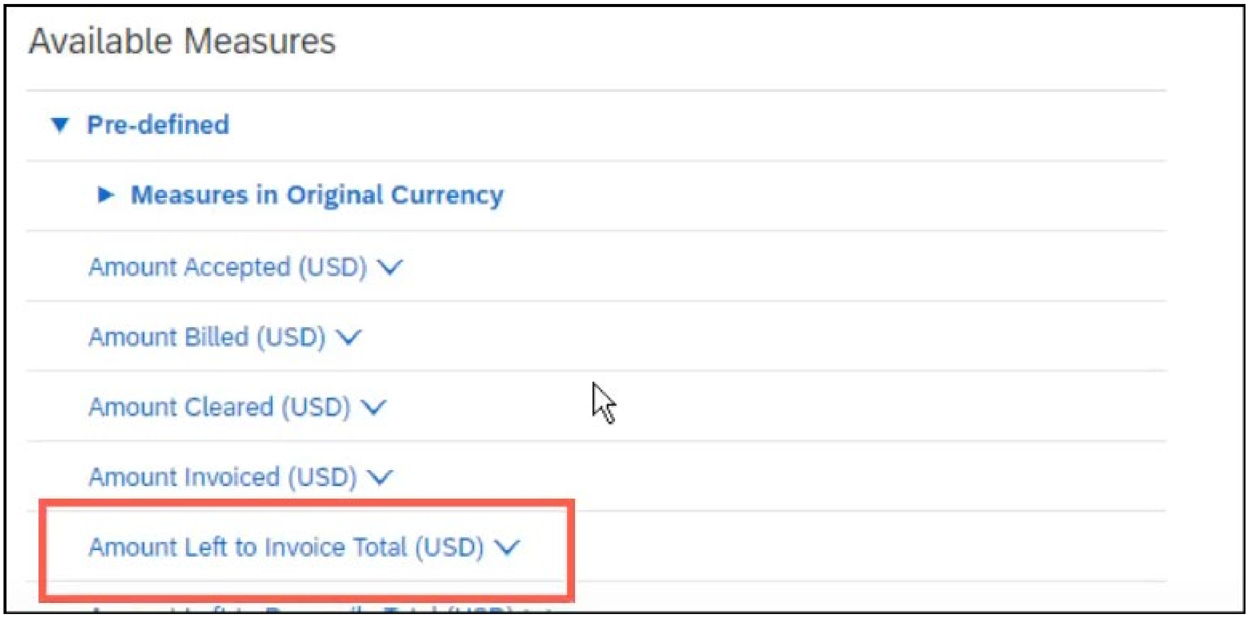

**10**

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.



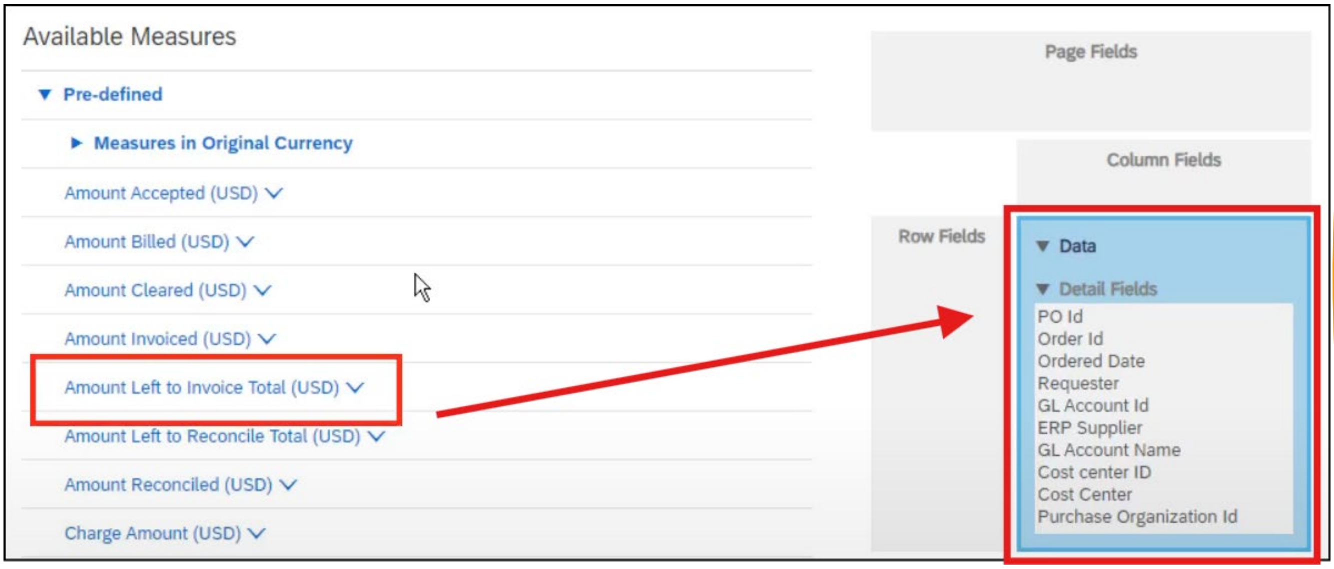
**11**

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.



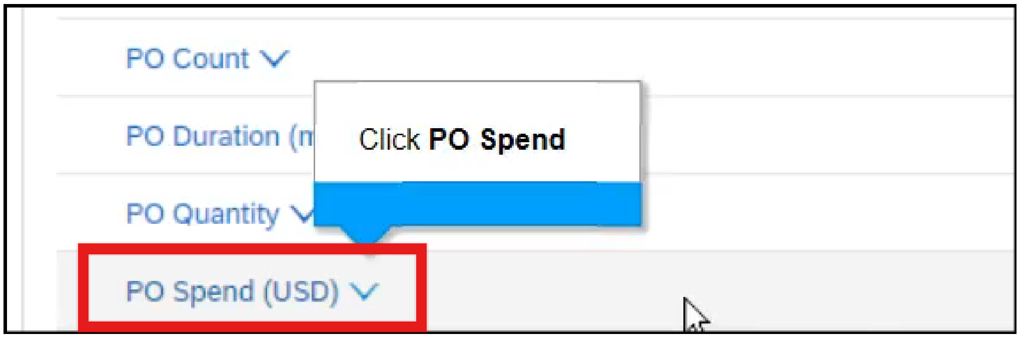

**12**

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



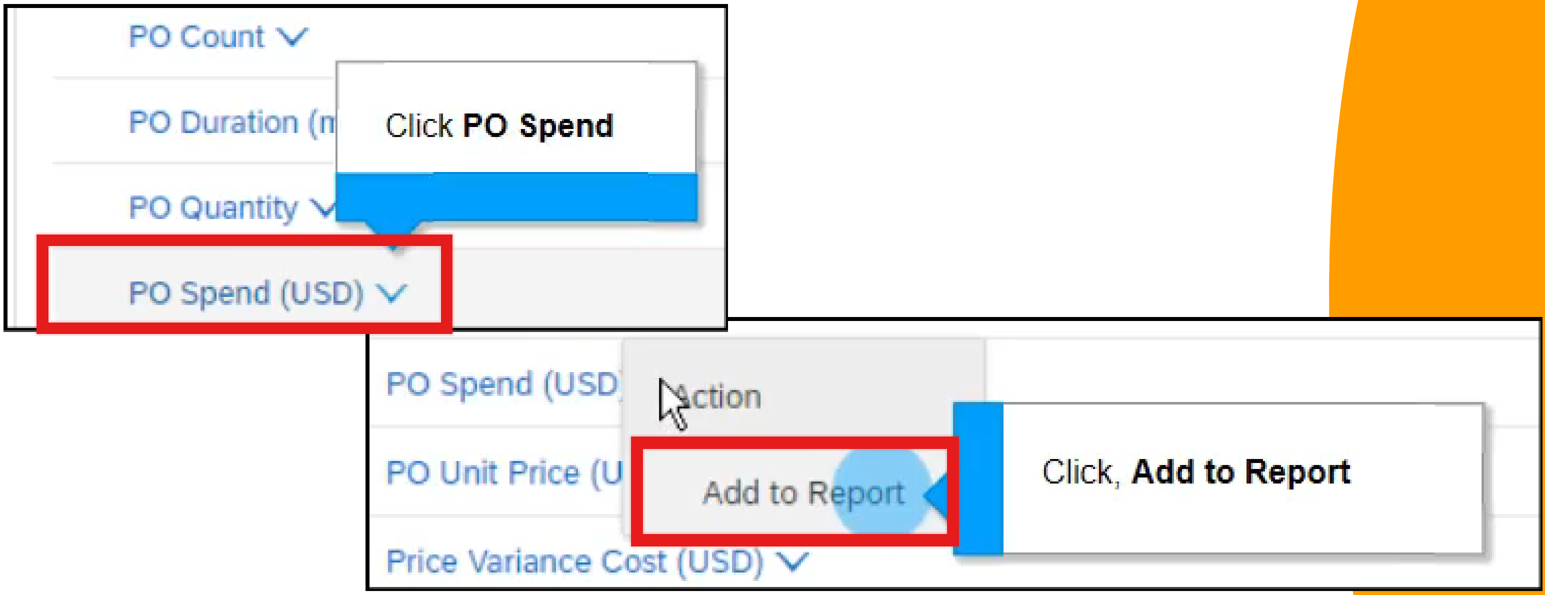
## 13

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.



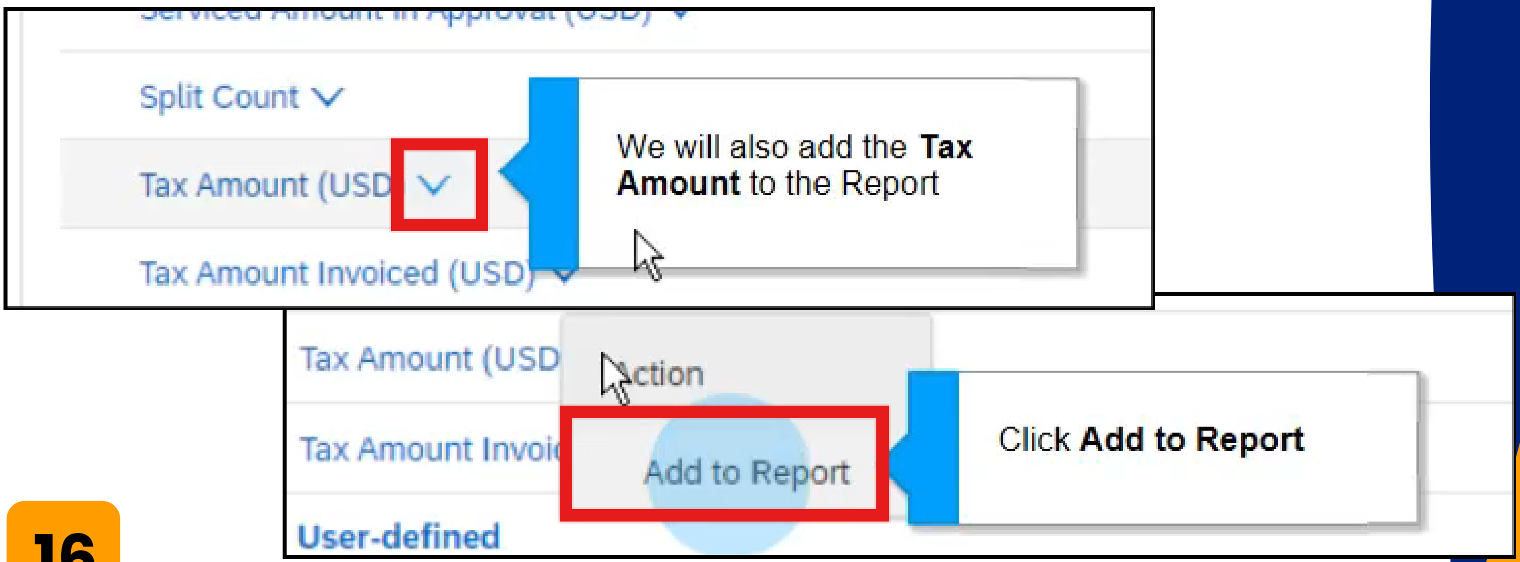

## 14

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



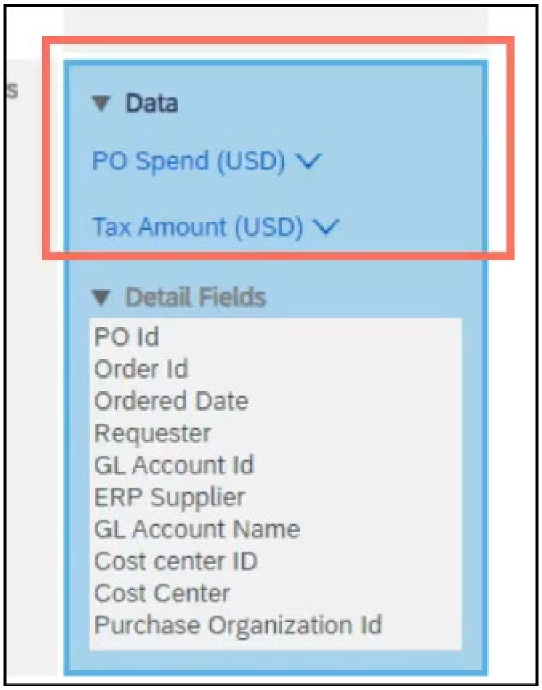
**15**

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.**



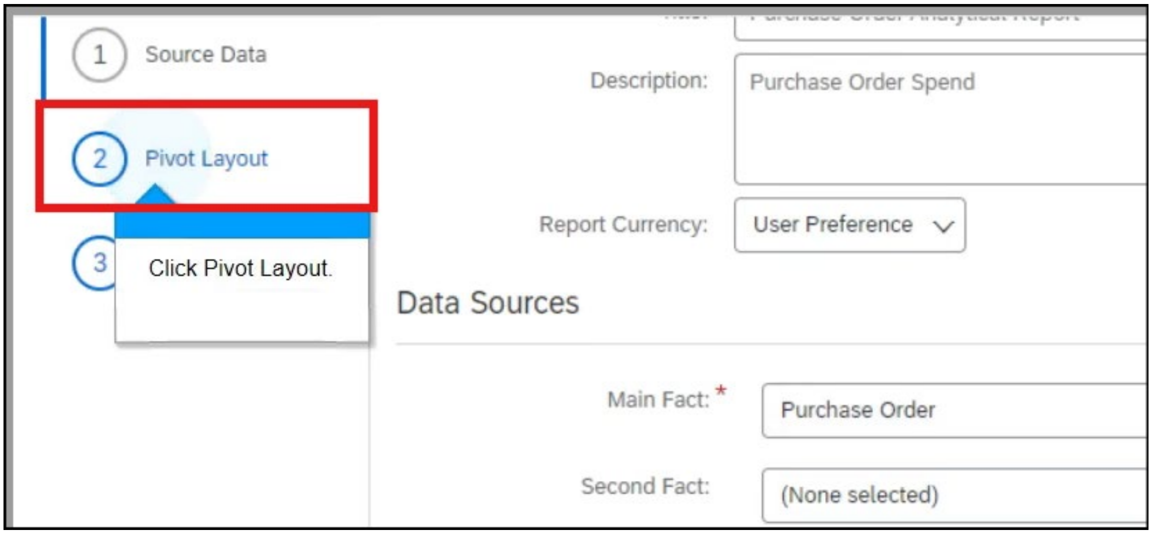

**16**

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



17

Scroll up. Click **Pivot Layout.**

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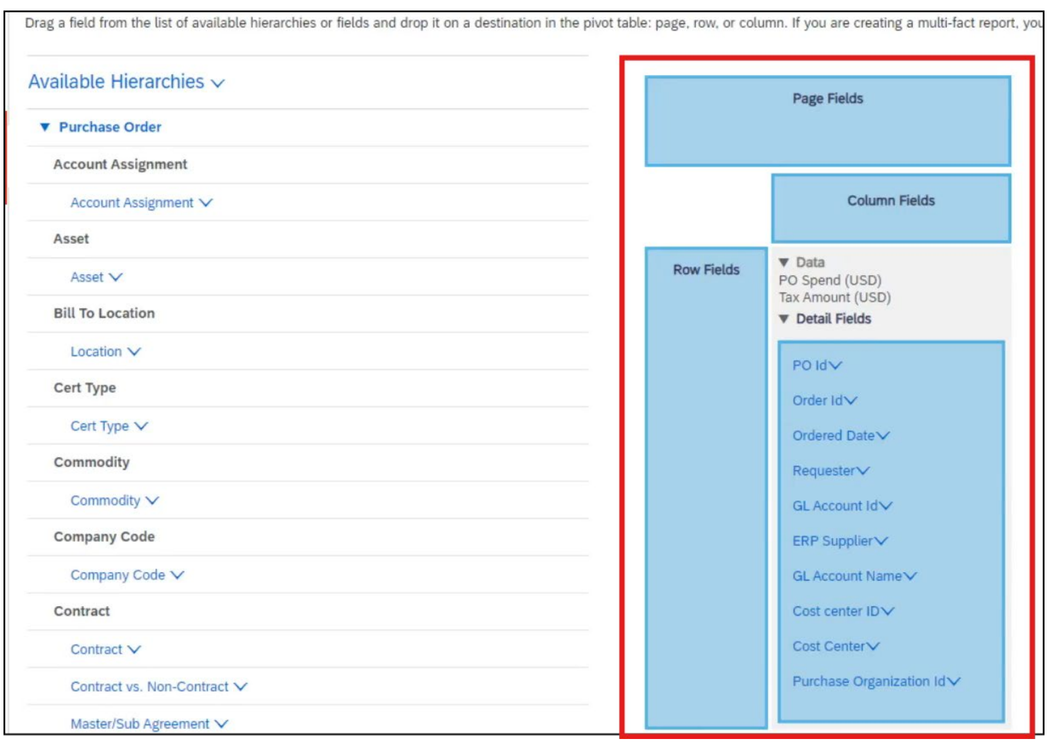
We’re now on the second tab of this report. Active fields are highlighted in blue.



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.

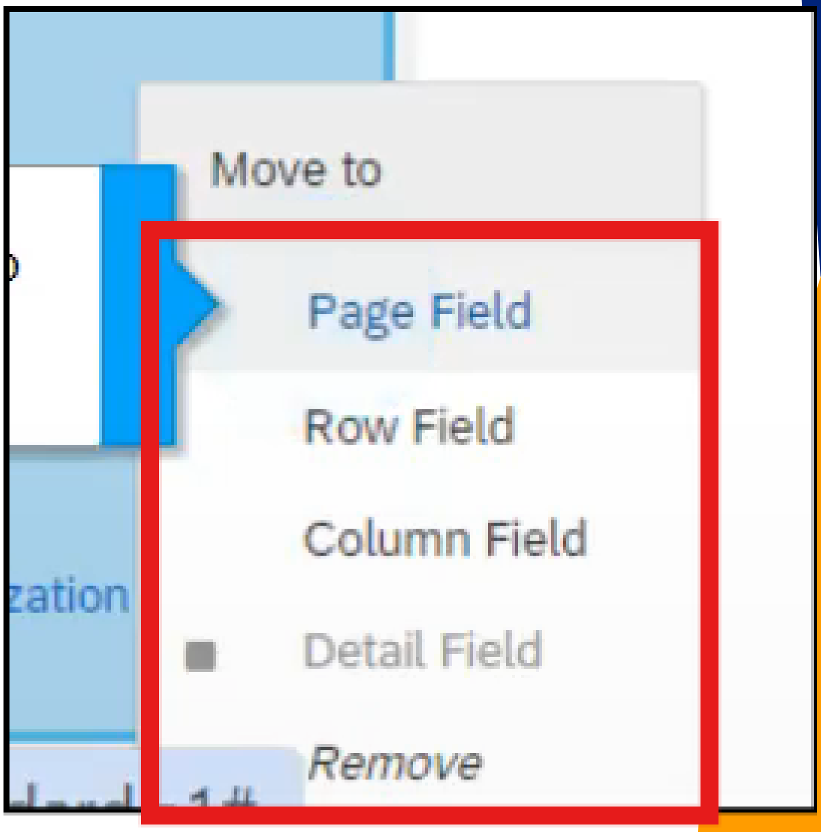
For example, commodity code is a hierarchy. It has four levels, starting from a broad category (level 1) and becoming increasingly specific down to level 4.

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.

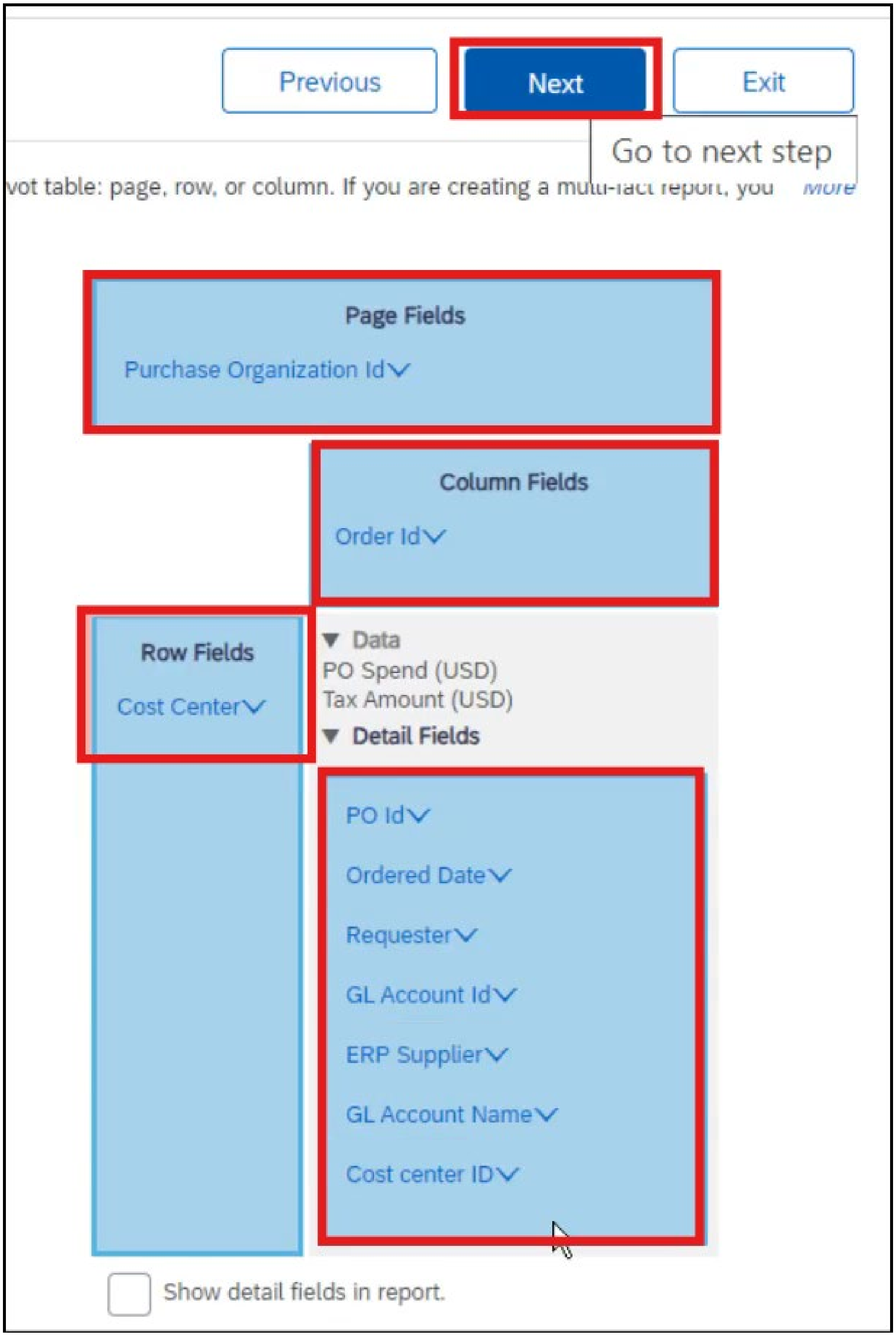
20

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.

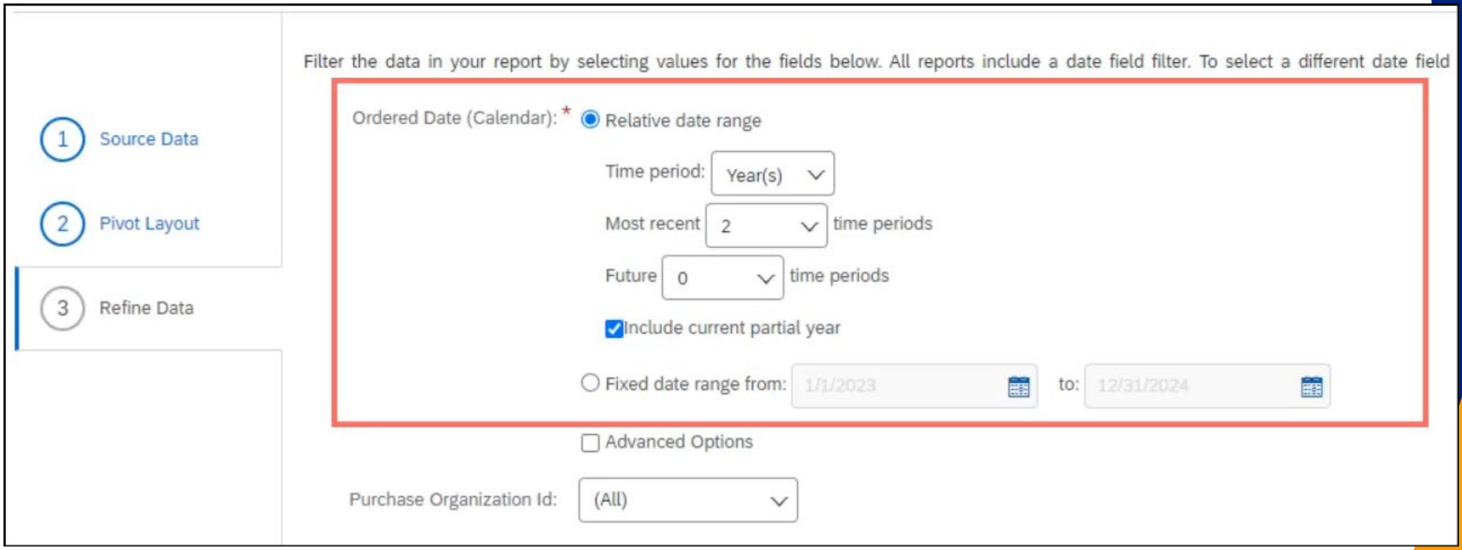
21

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

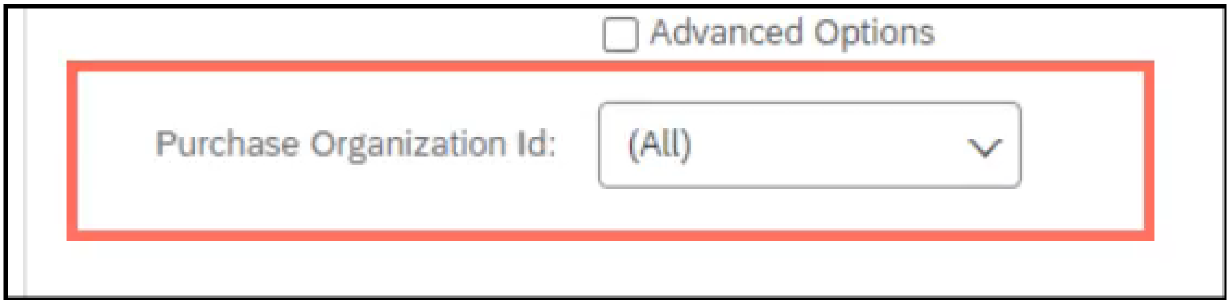


Review and adjust the “**Refine Data**” section to meet your specific needs.

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




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



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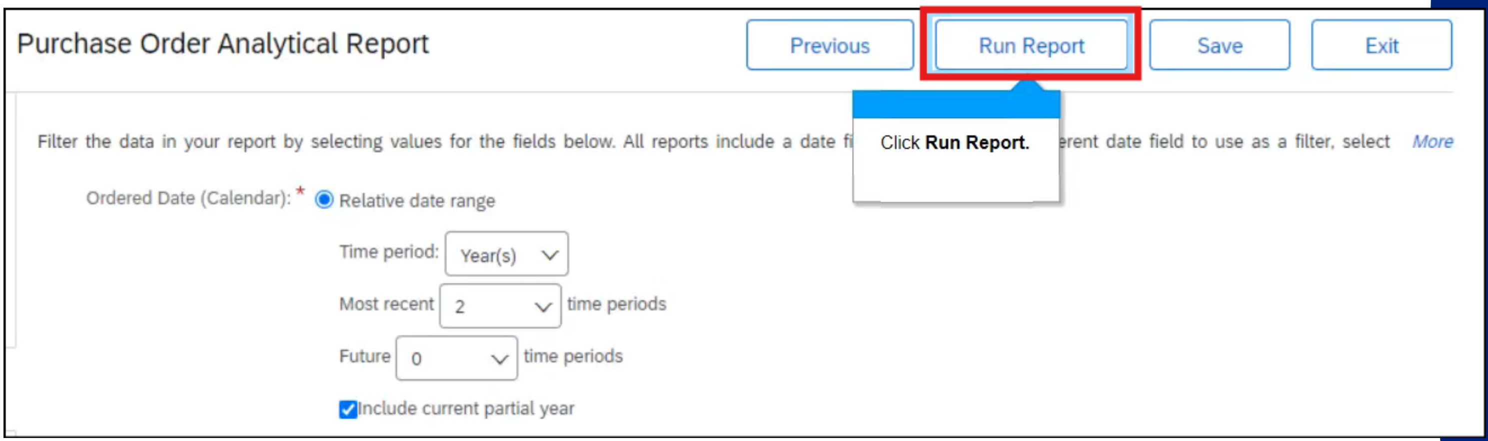
Once you've verified and made any necessary changes to the values, click **Run Report.**

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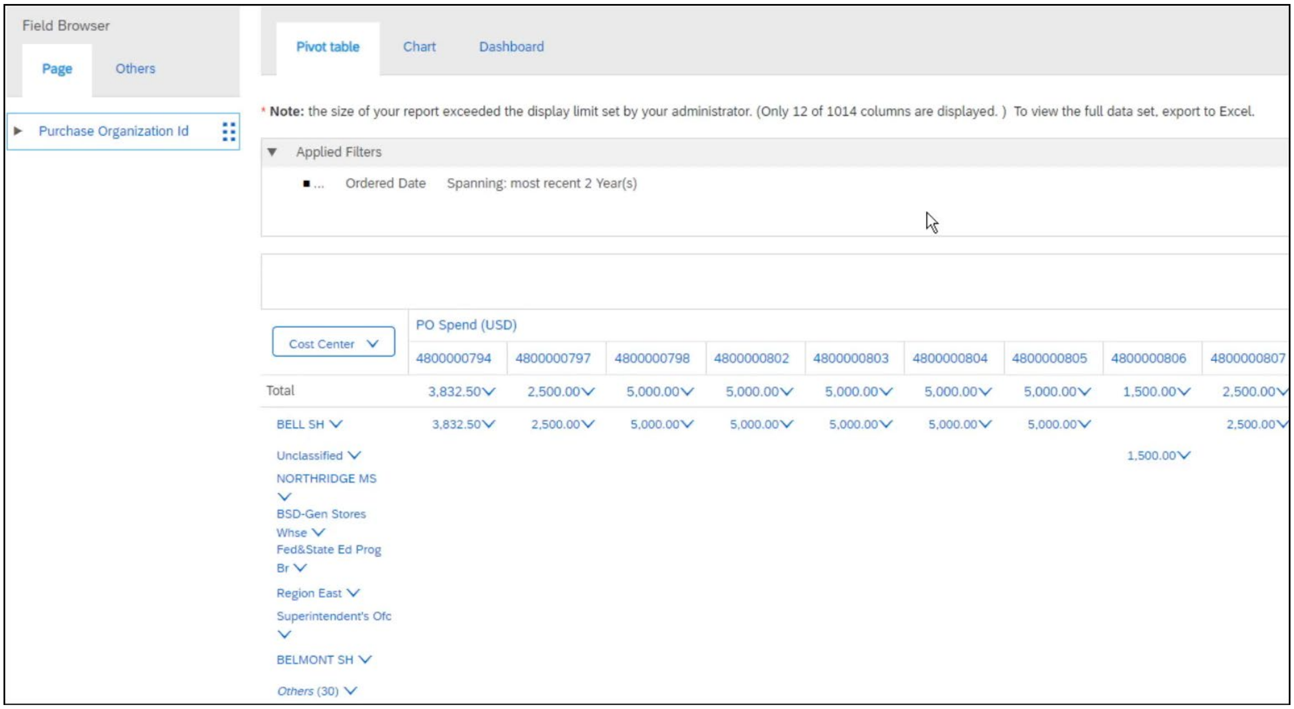
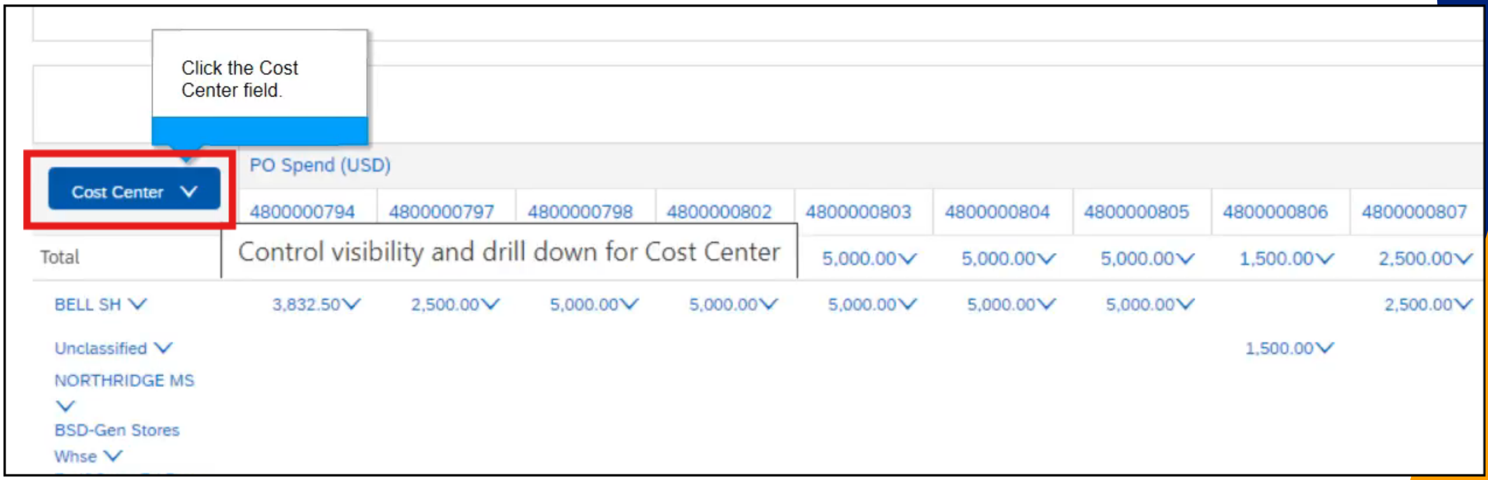
The report will generate results based on the specific criteria you defined within the pivot table.



25

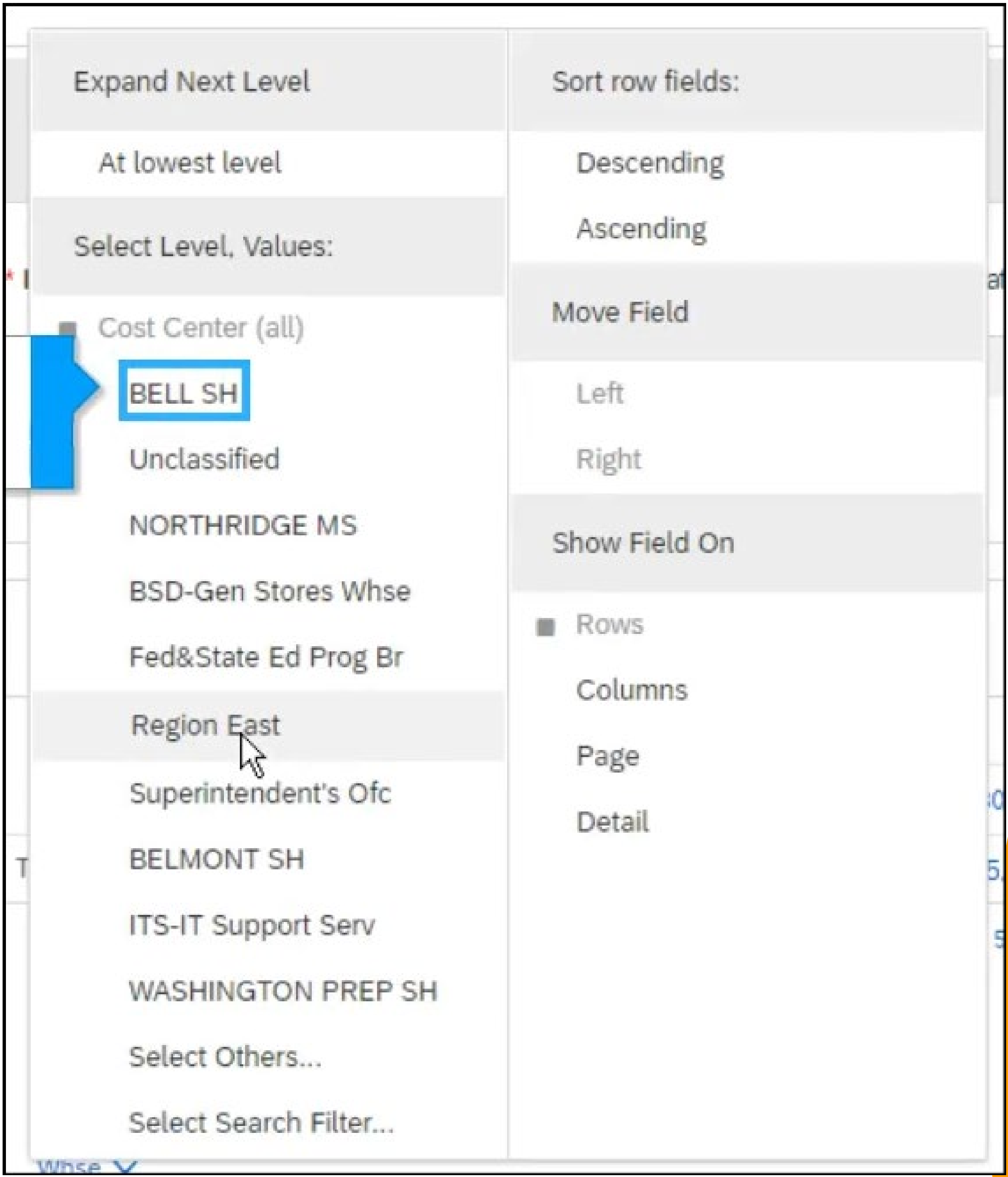
After generating the report, you can modify its view. For example, you can change the cost center.

Click **Cost Center**.



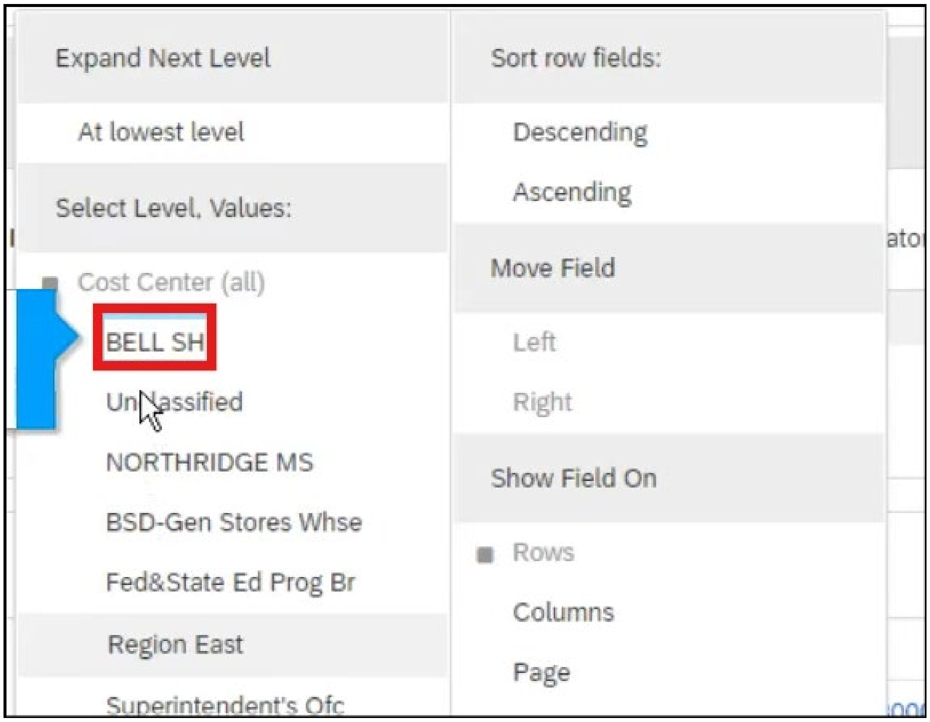
# 26

The cost center menu will expand.



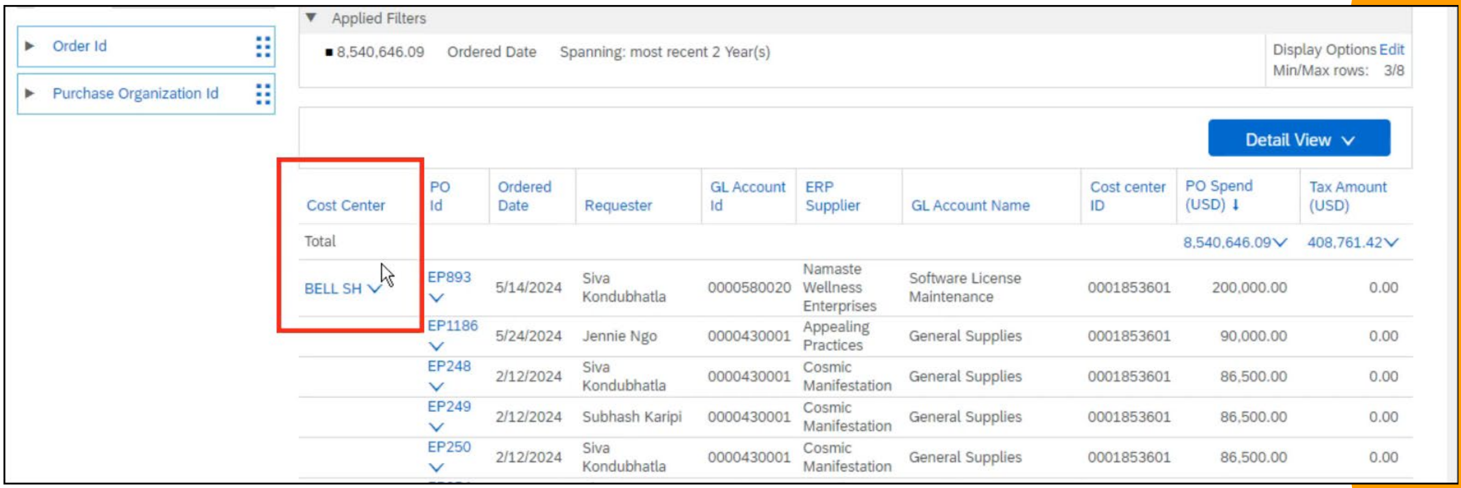
## 27

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



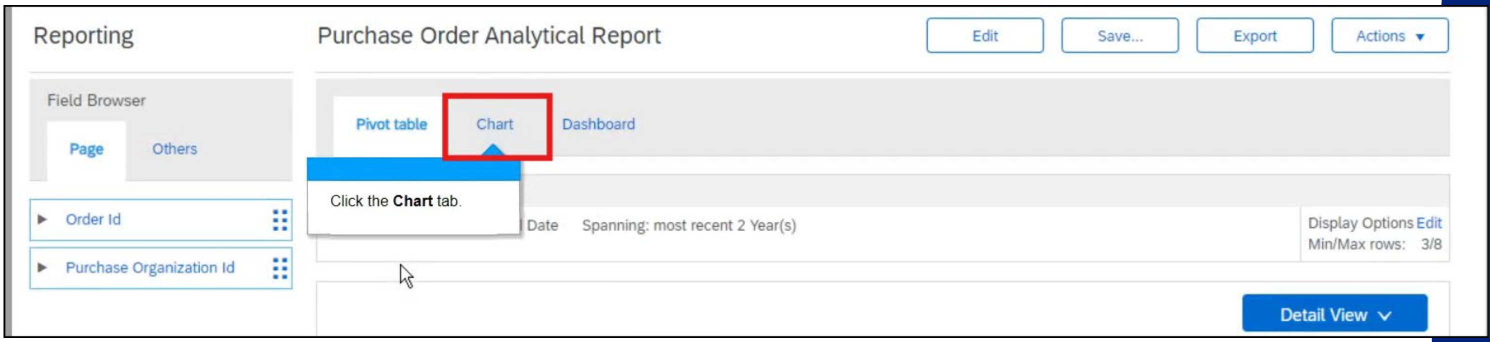

## 28

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



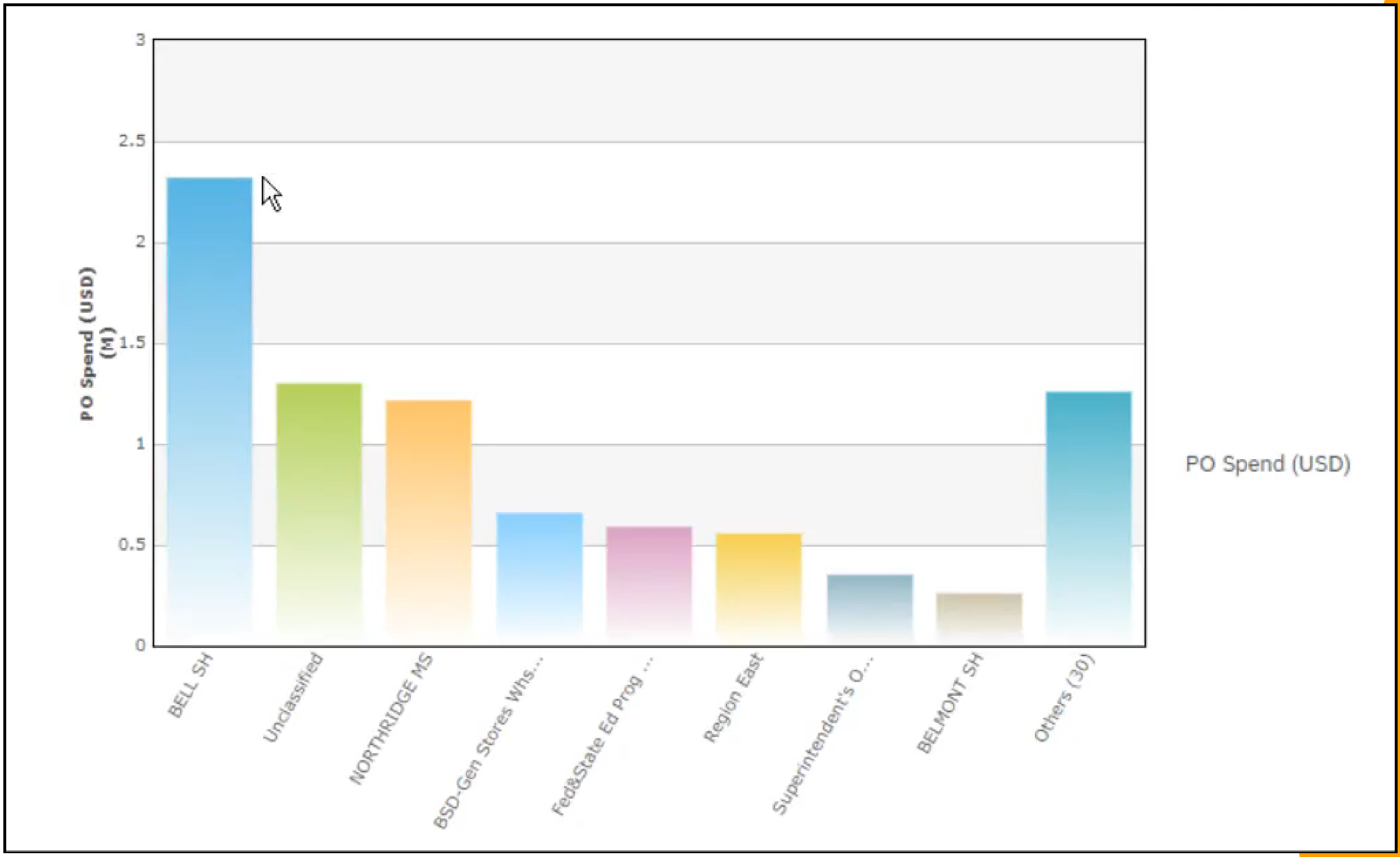
29

Click on the **Chart** tab.

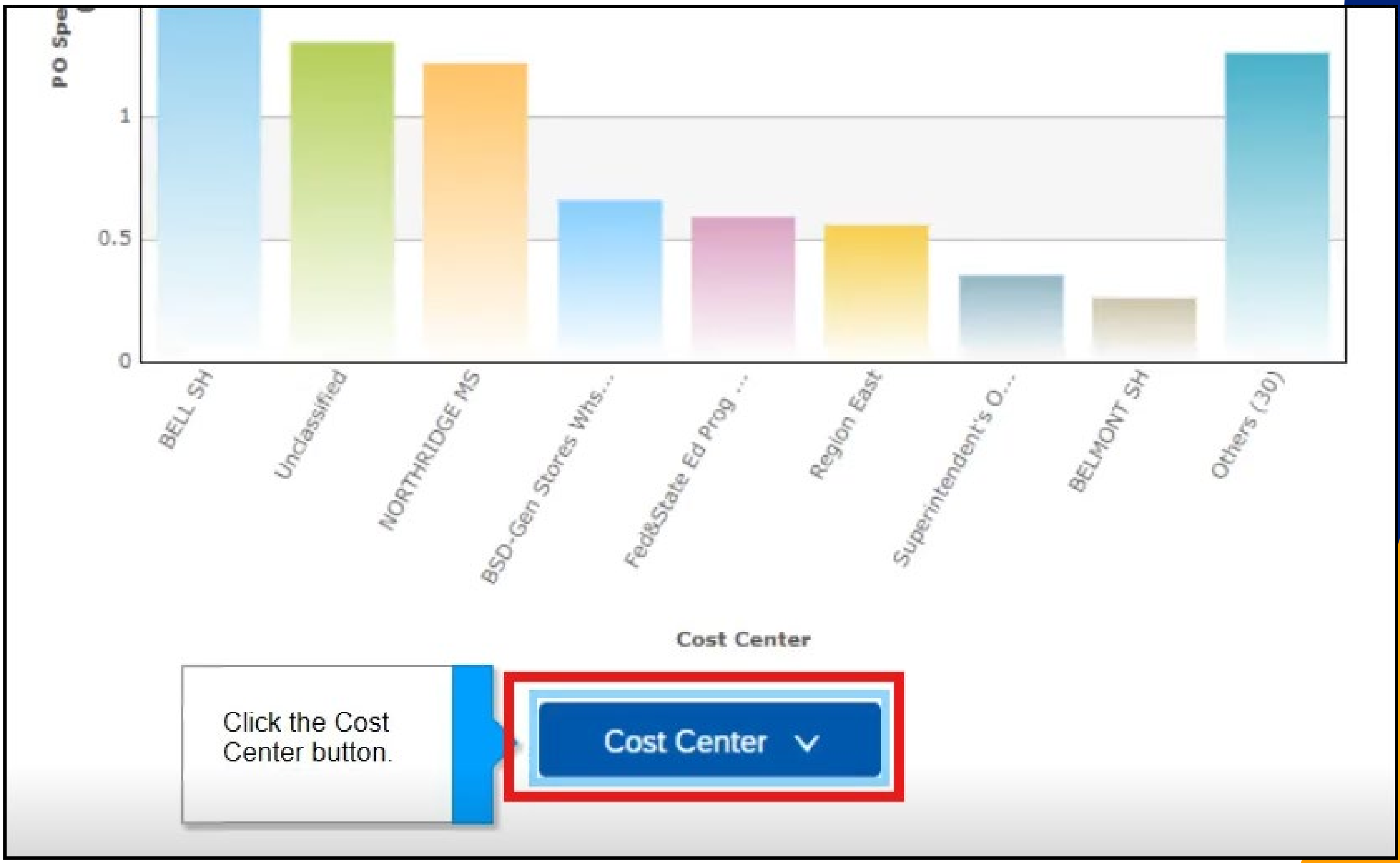



30

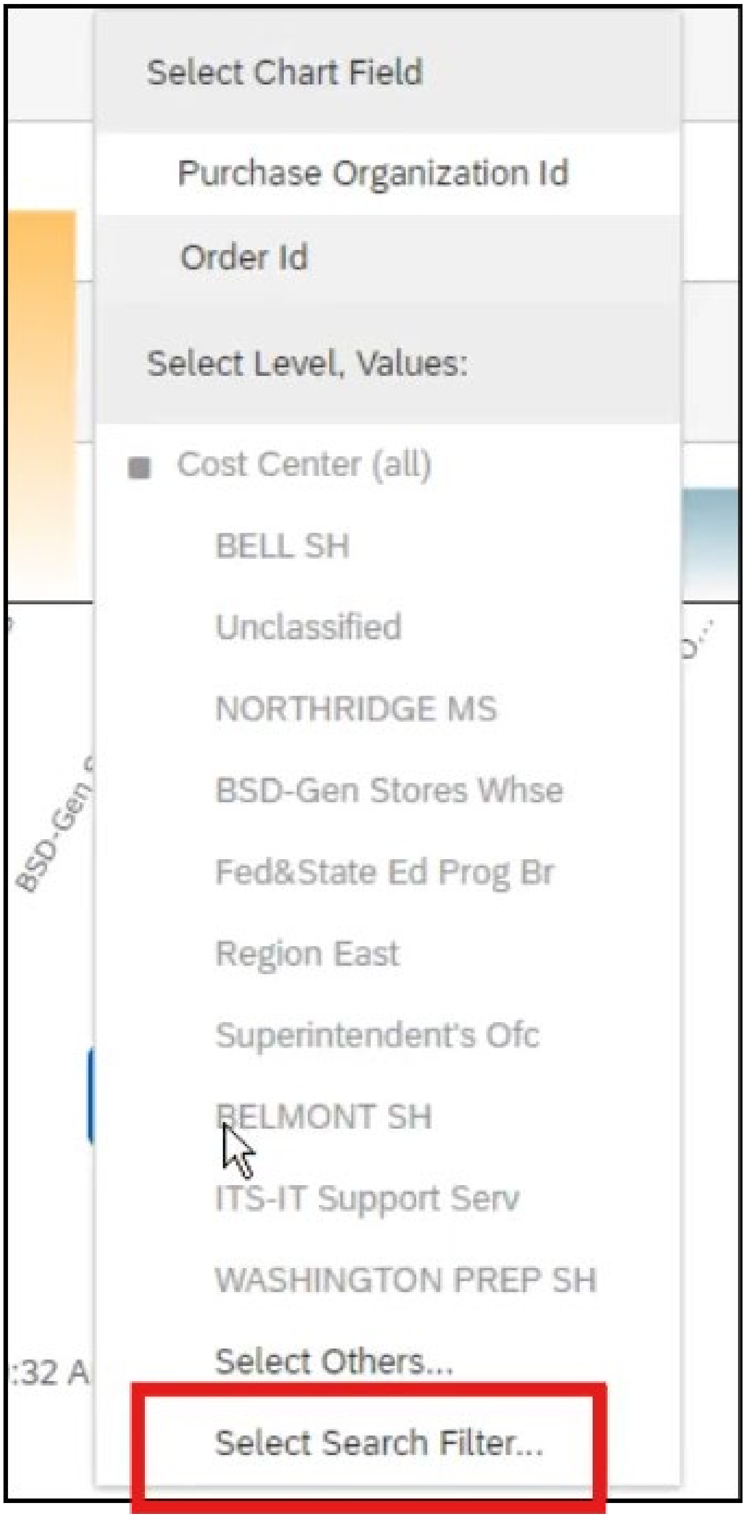
A column chart has been automatically generated to provide a visual representation of purchase order spending categorized by Cost Center.



Scroll down → click **Cost Center**.



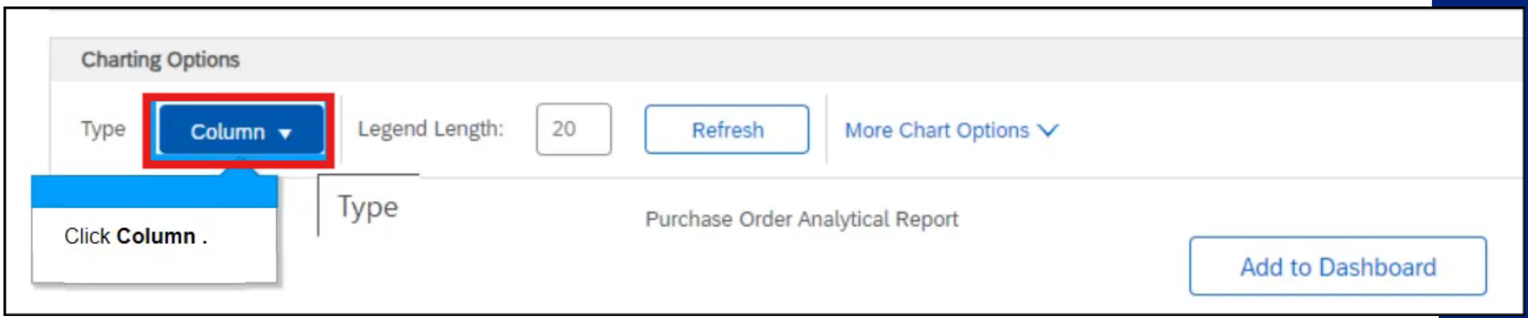
This menu allows you to change the details of this graph.



**33**

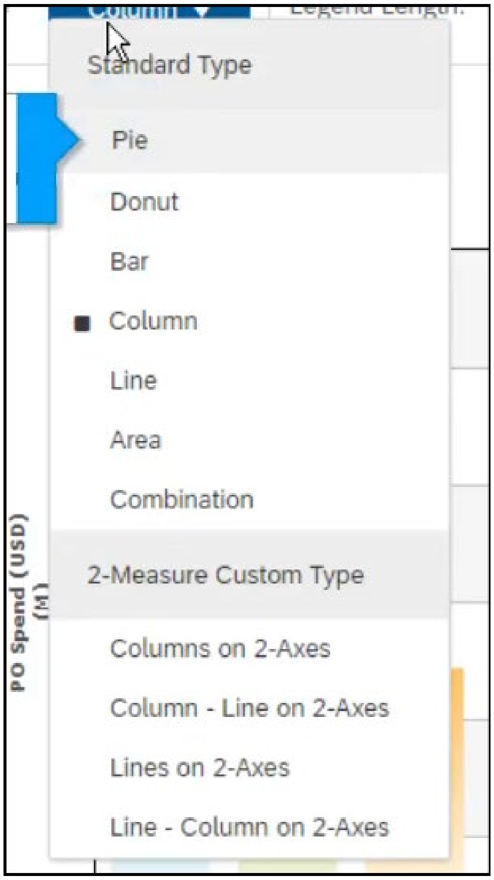
Charting Options Type allows us to change the type of graph.

Click **Column**.



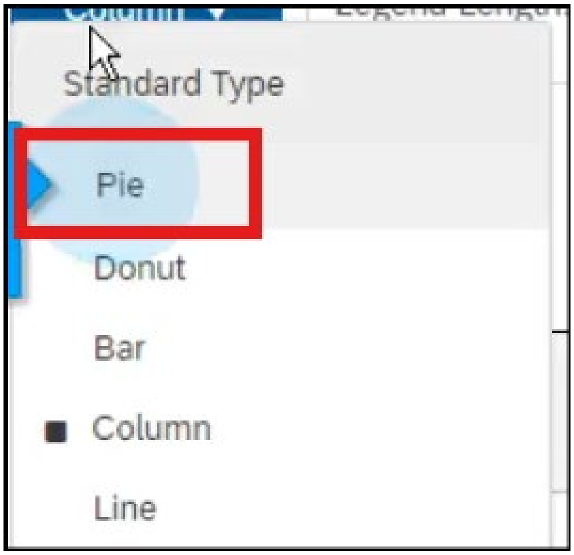

**34**

There are many graph types to choose from.



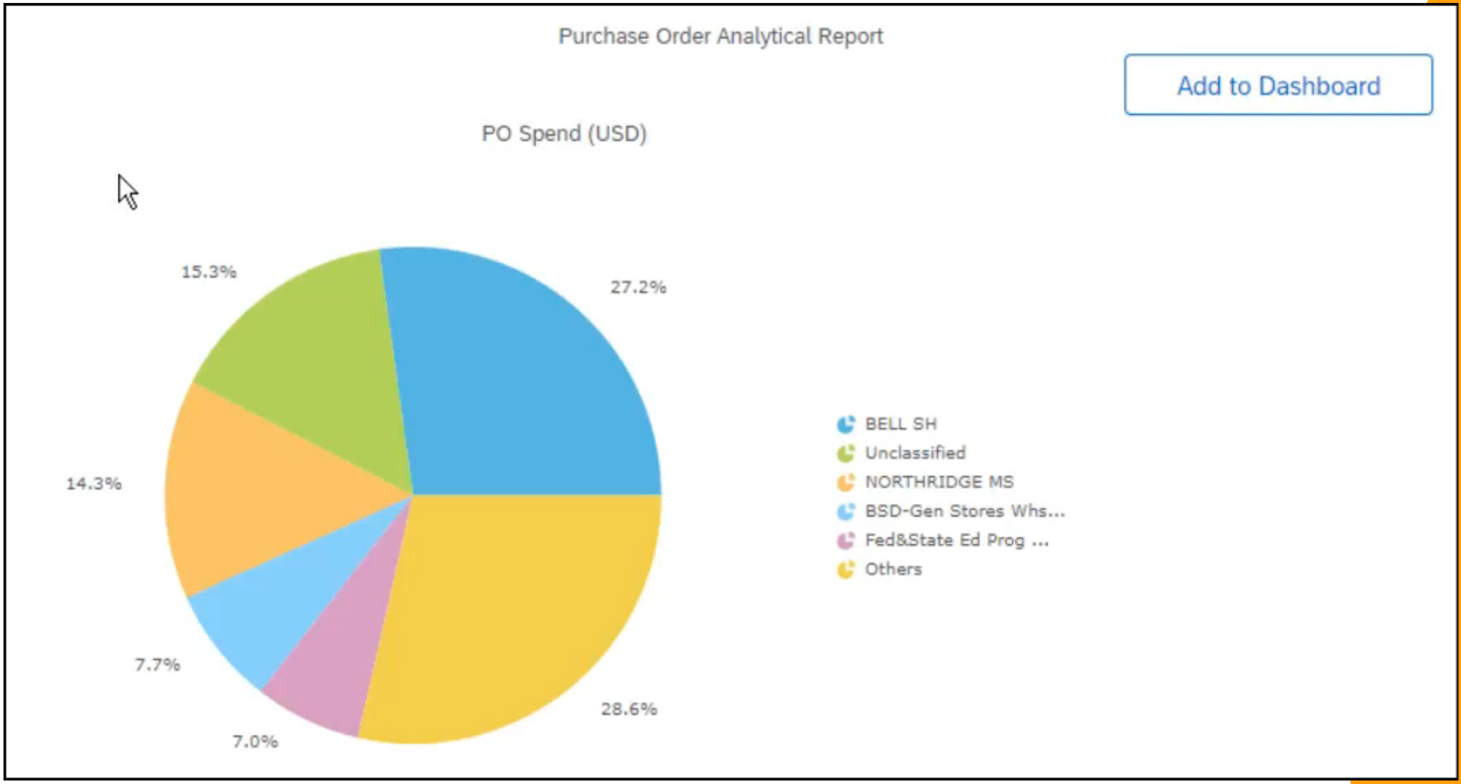
**35**

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



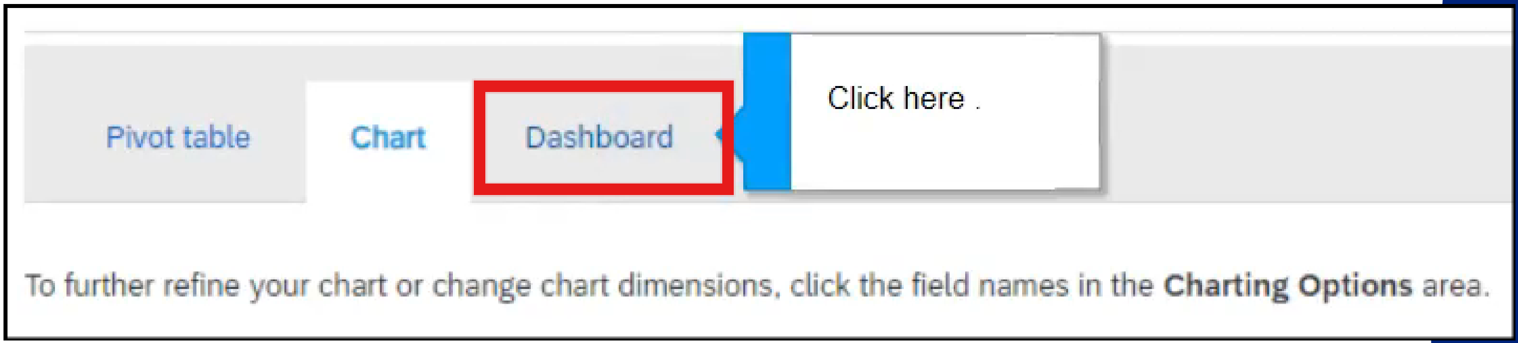

**36**

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



37

Click on the **Dashboard** tab.



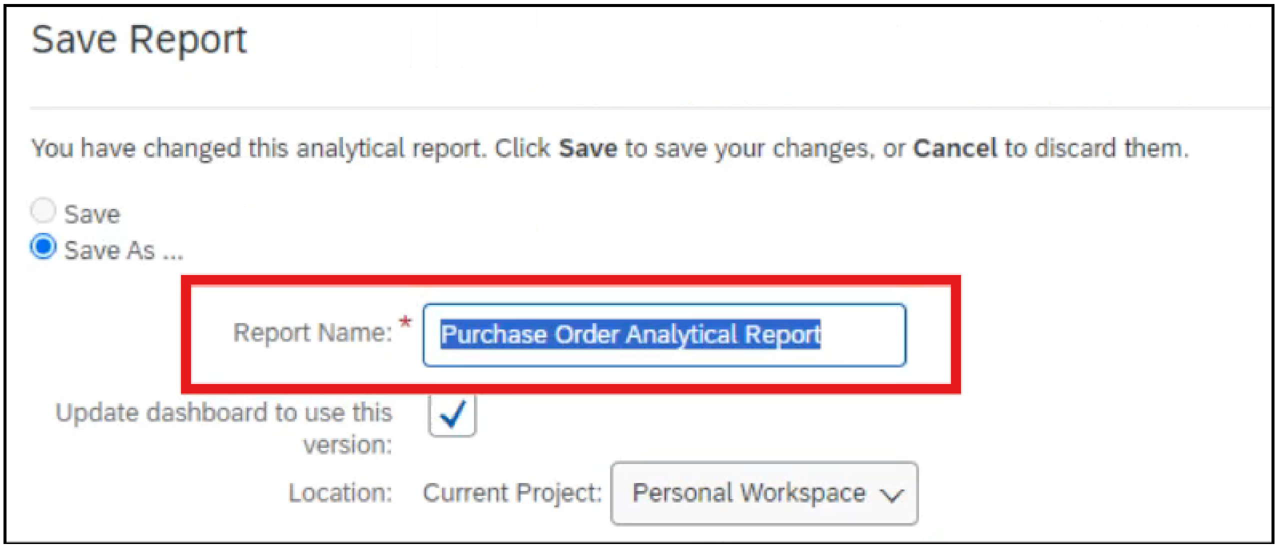

38

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

Click **Add to Dashboard**.

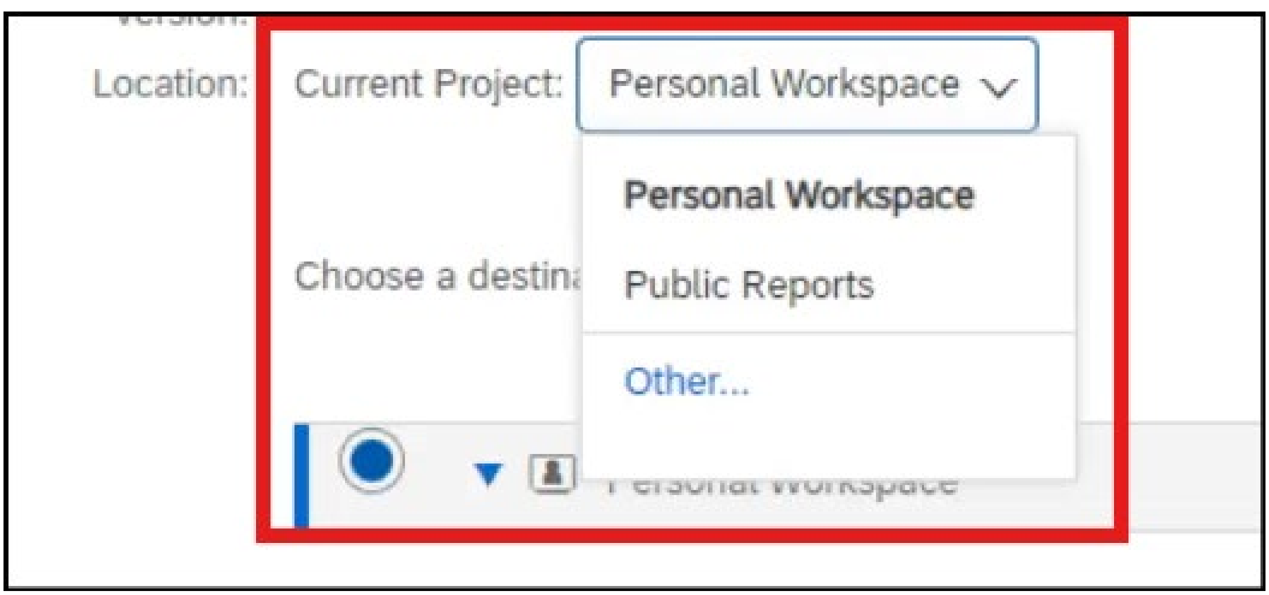
**39**

Enter the **Report Name**.




**40**

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.



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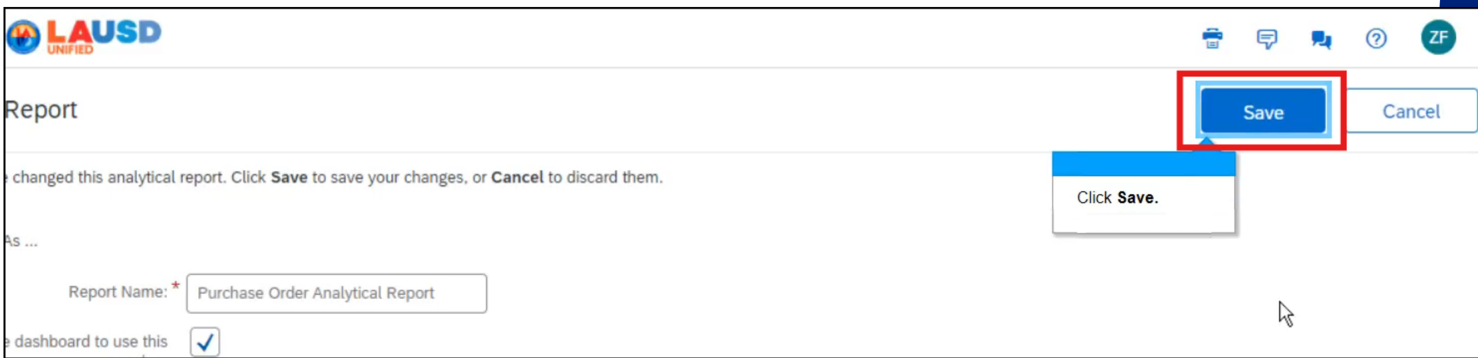
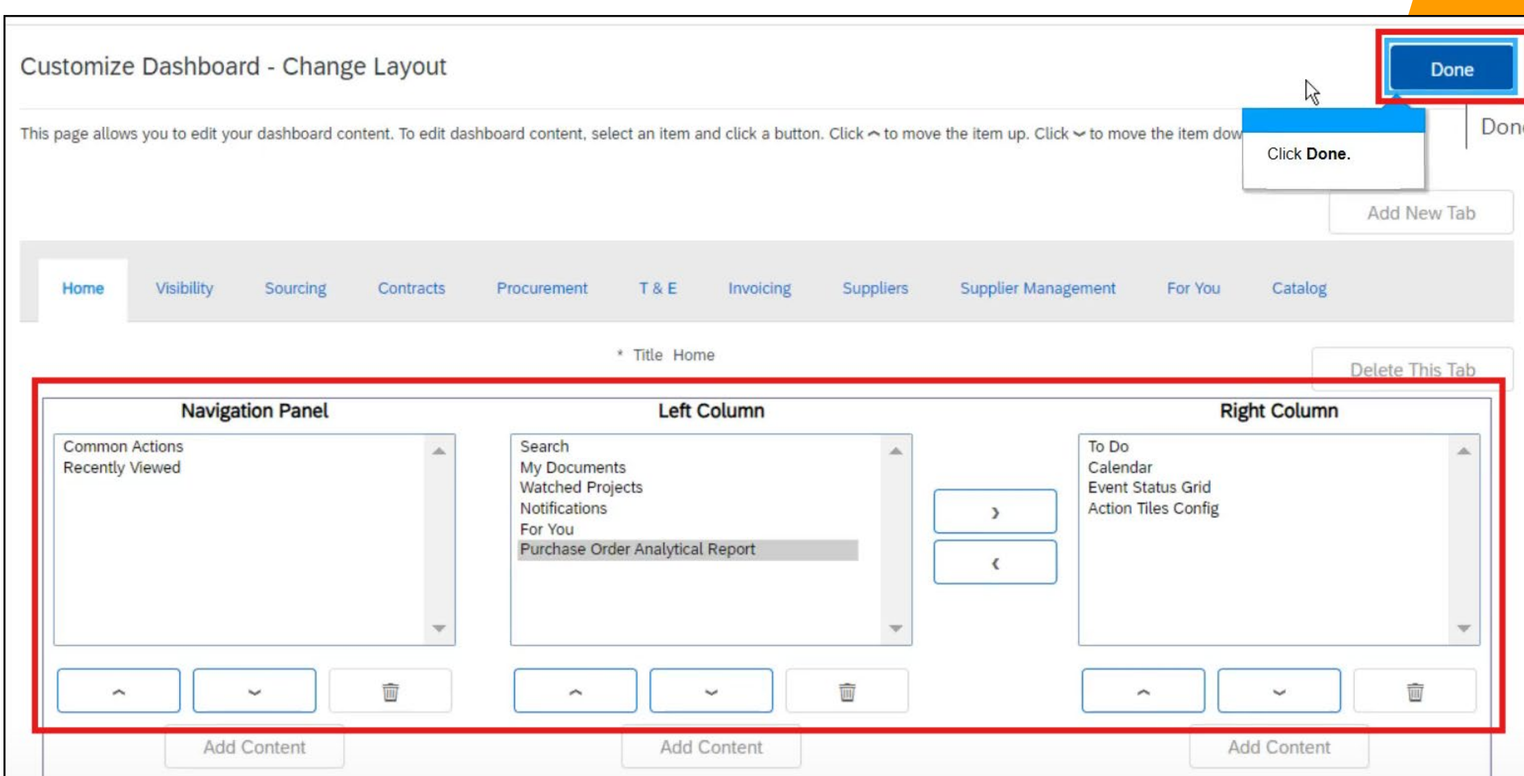
Click **Save**.



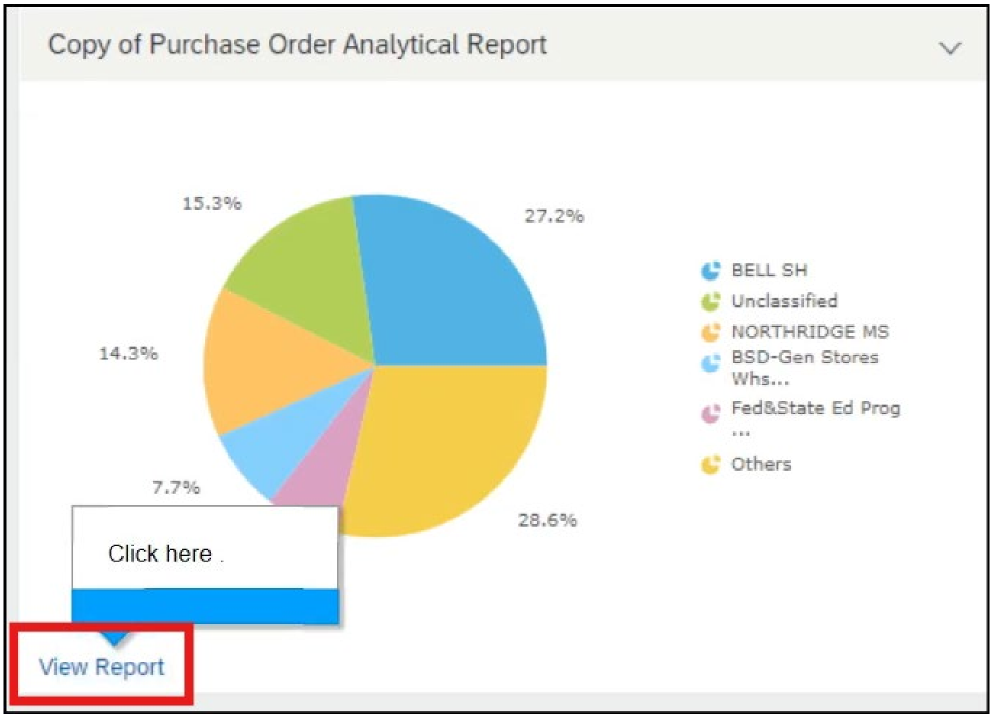

## 42

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



**43**

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




**44**

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