

# SAP Ariba

**PROCUREMENT SERVICES DIVISION**



## **End-USER Training**

*Guided Buying*

How to Create a Prepackaged  
Report

# The purpose of this job aid is to show how to access prepackaged reports in Guided Buying.

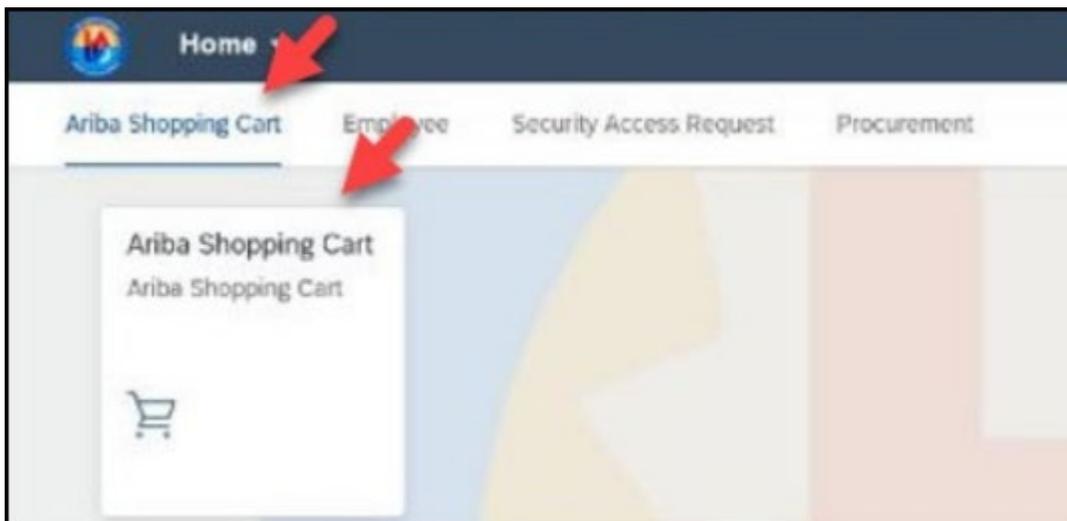
1

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



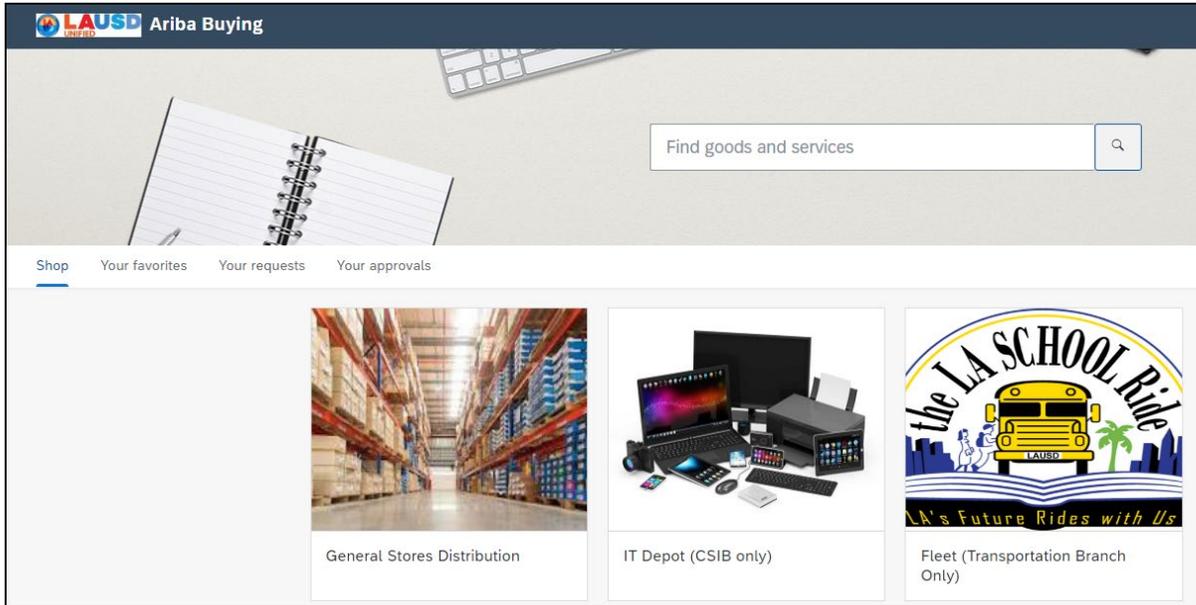
2

Click on the "Ariba Shopping Cart" tile.



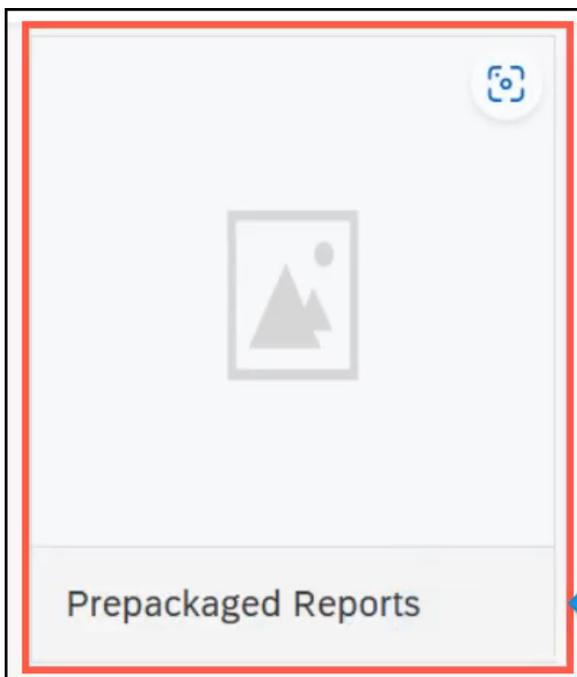
3

You will be directed to the Ariba Buying home page.



4

Scroll down. Click Prepackaged Reports.



3

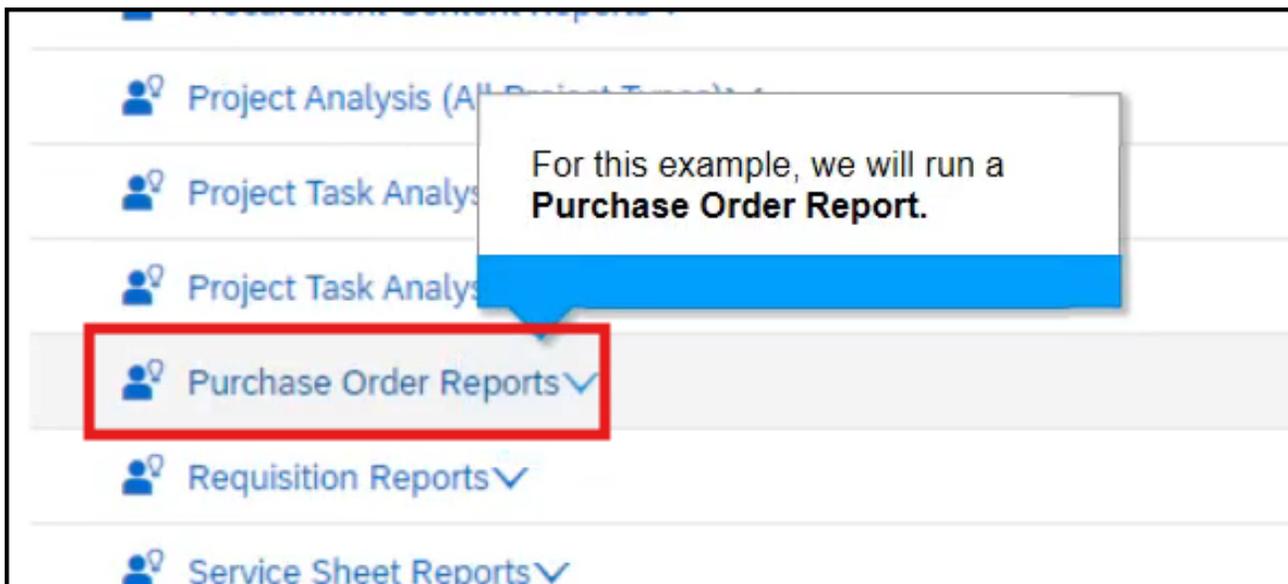
You will be directed to the **Prepackaged Reports** page.



Name	Owner
Approval Reports	aribasystem
Ariba Benchmark Program Reports	aribasystem
Budget Reports	aribasystem
Buyer Settlement Reports	aribasystem
Catalog Reports	aribasystem
Contingent Labor Analysis	aribasystem
Contract Reports	aribasystem
Contract Workspace (Internal) Analysis	aribasystem

4

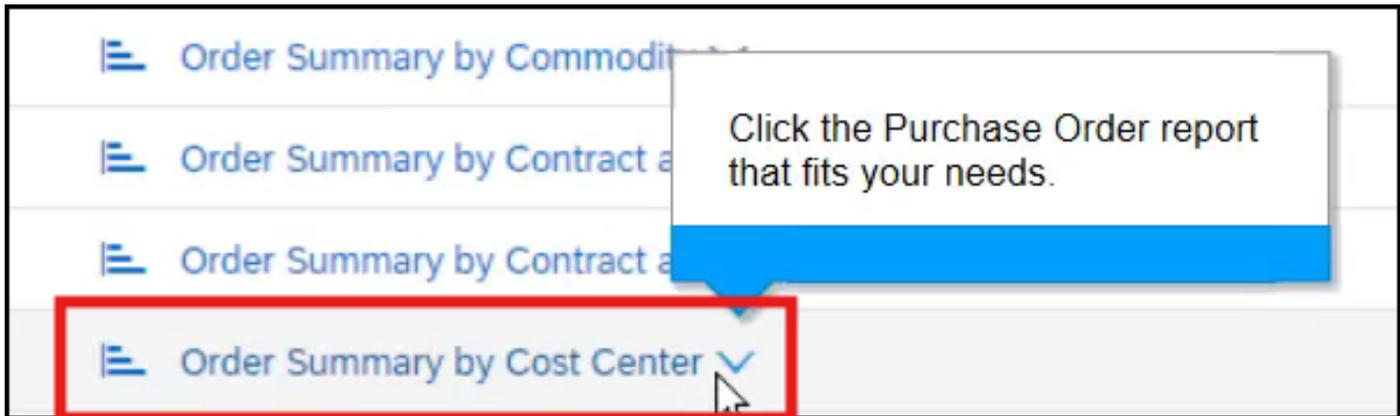
For this example, we will run the **Purchase Order Reports**. Click **Purchase Order Reports**.



Project Analysis (All Point To...)
Project Task Analysis
Project Task Analysis
<b>Purchase Order Reports</b>
Requisition Reports
Service Sheet Reports

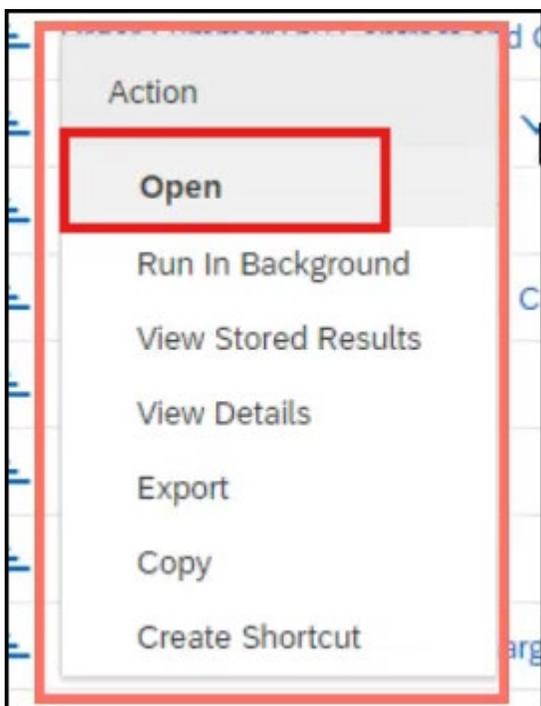
5

In this example, we will run **Order Summary by Cost Center**. Click **Order Summary by Cost Center**.



6

Drop-down menu will open. For this example, click **Open** to further refine the report.



7

You will be directed to **Refine Data** page.

Refine Data View Report Cancel Export Background

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 to use as a filter, select **Advanced Options**. For multi-fact reports, [More](#)

Ordered Date (Calendar): \*  Relative date range

Time period: Year(s) Click to open.

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)

Cost Center: (All)

Commodity (L1): (All)

Common Supplier: (All)

View Report Cancel Export Background

8

You have the option to select the **Relevant date range**.

Ordered Date (Calendar): \*  Relative date range

Time period: Year(s) Click to open.

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

9

Select **Include current partial year** if you would like to include this year's data.

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

Click the checkbox to include current partial year.

10

If you want to choose a fixed date range, select **Fixed date range** and enter the dates.

Future 0 ▾ time periods

Include current partial year

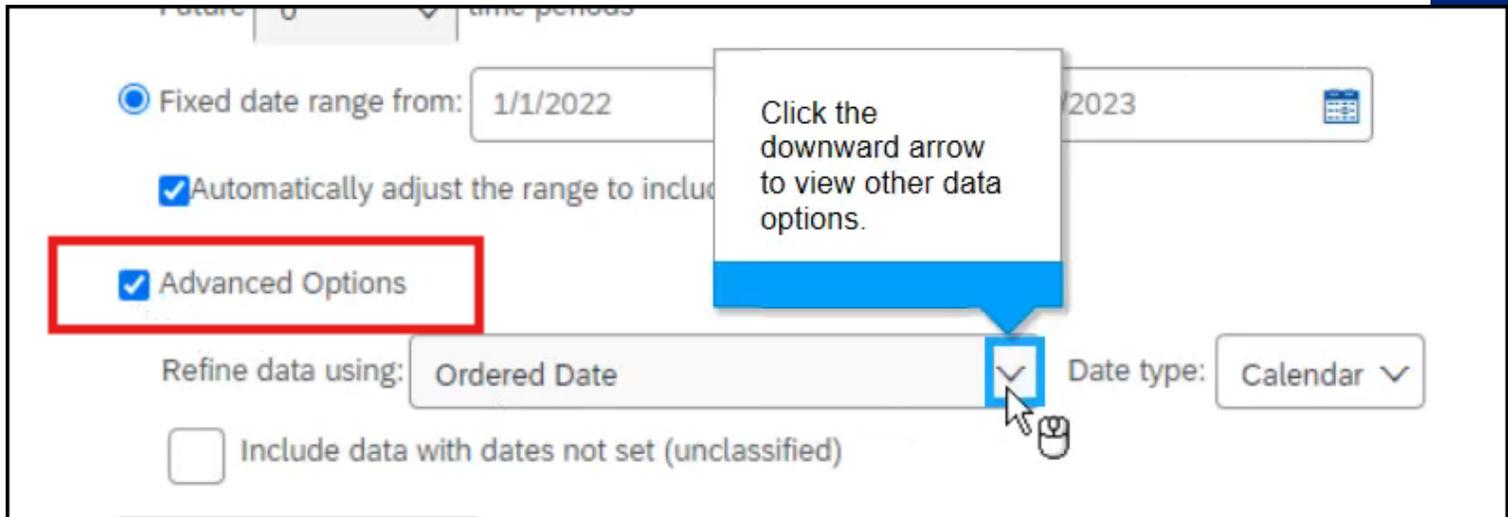
Fixed date range from: 1/1/2022 to: 12/31/2023

Advanced Options

Users also have the option to choose a relative date range.

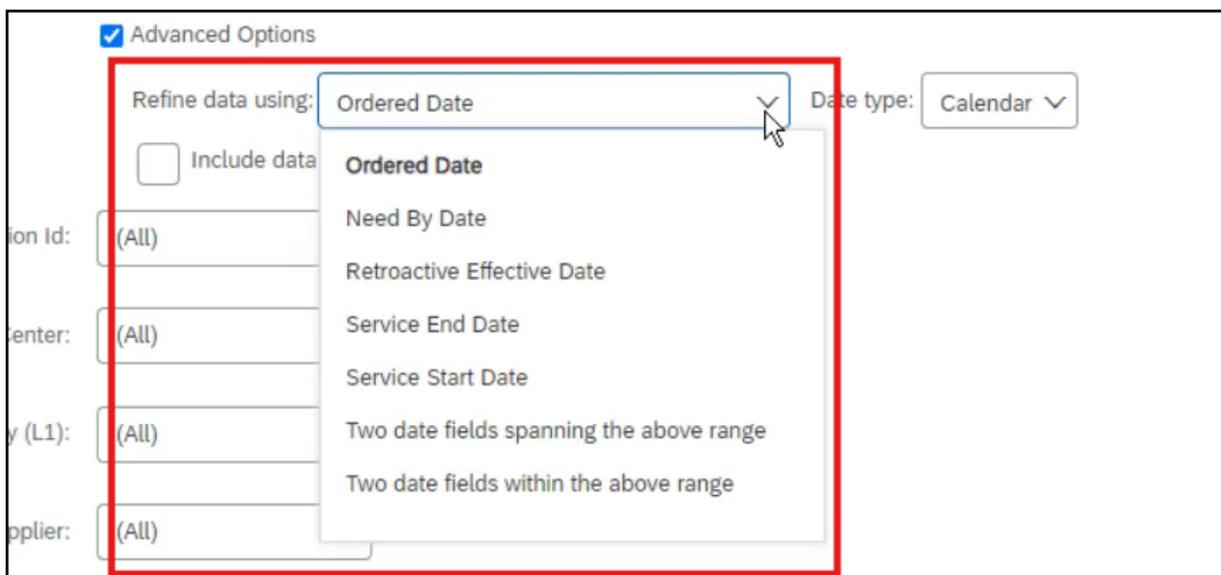
11

Select **Advanced option** to refine the data further.



12

You can see the available options for this menu which can be used to further refine the reporting view.



13

Select **Include data with dates not set (unclassified)** to include unclassified data. Typically, it's a good idea to check this box.

Click the checkbox to include unclassified data.

Advanced Options

Refine data using: Ordered Date Date type: Calendar

Include data with dates not set (unclassified)

Purchase Organization Id: (All)

Cost Center: (All)

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You have the option to select the specific values for **Purchase Organization Id, Cost Center, Commodity, and Common Supplier.**

Purchase Organization Id: (All)

Cost Center: (All)

Commodity (L1): (All)

Common Supplier: (All)

15

In this example, we are reverting to our **Relative date range** option.

Ordered Date (Calendar): \*  Relative date range

Time period: Year(s) ▾

Most recent 2 ▾ time periods

Future 0 ▾ time periods

Include current partial year

16

For this example, uncheck the Advanced Options.

Include current partial year

Fixed date range from: 1/1/2022  to: 12/31/2023 

Advanced Options

Purchase Organization Id: (All) ▾

Cost Center: (All) ▾

If you anticipate that this is going to be a large report, you have the option to click **Background**.

This will run the report in the background, allowing you to continue working in Ariba while the data is being compiled. Ariba will send you an email with a link when the report is finished.

The screenshot shows the LAUSD Unified report generation interface. At the top, there are navigation links for "Jump to Navigation" and "Jump to Content", and a "Test Site" label. The LAUSD UNIFIED logo is on the left, and utility icons (print, chat, help, ZF) are on the right. Below the navigation is a "Refine Data" section with four buttons: "View Report", "Cancel", "Export", and "Background". The "Background" button is highlighted with a red border. Below the buttons, there is a filter section for "Ordered Date (Calendar):" with two radio buttons: "Relative date range" (selected) and "Fixed date range from: 1/1/2022 to: 12/31/2023". Under "Relative date range", there are three dropdown menus: "Time period: Year(s)", "Most recent: 2 time periods", and "Future: 0 time periods". There is also a checkbox for "Include current partial year".

18

You have the option to export the report data. Click **Export** to Excel.

The screenshot shows the top navigation bar with 'Jump to Navigation' and 'Jump to Content' buttons, and the 'Test Site' label. The LAUSD UNIFIED logo is on the left, and utility icons (print, chat, help, ZF) are on the right. Below the navigation is a 'Refine Data' section with buttons for 'View Report', 'Cancel', 'Export', and 'Background'. The 'Export' button is highlighted with a red border. Below this is a filter section for 'Ordered Date (Calendar):' with a radio button for 'Relative date range' selected. It includes dropdowns for 'Time period: Year(s)', 'Most recent: 2 time periods', and 'Future: 0 time periods', along with an unchecked checkbox for 'Include current partial year' and a 'Fixed date range from: 1/1/2022 to: 12/31/2023' option.

19

You also have the option to **View Report** in Ariba. Click **View Report**.

This screenshot is similar to the previous one, showing the 'Refine Data' section. In this view, the 'View Report' button is highlighted with a red border, and a blue tooltip box with the text 'Click View Report.' is positioned over it. The rest of the interface, including the navigation bar and filter options, is identical to the previous screenshot.

You will be directed to the compiled data.

Field Browser

Page Others

Pivot table Chart Dashboard

Applied Filters

Ordered Date Spanning: most recent 2 Year(s)

Display Options Edit Min/Max rows: 3/8

Detail View

Cost Center	Commodity (L1)	Common Supplier	Ordered Date	PO Status	Order Id	PO Spend (USD)
Total						158,746.80
BELL SH	subtotal					105,251.80
	Unclassified	subtotal				105,251.80
		Cosmic Manifestation	subtotal			79,215.00
			11/8/2023	Ordered	4800000798	5,000.00
			11/1/2023	Ordered	EP53	4,000.00
			11/30/2023	Ordered	4800000794	3,832.50
			10/31/2023	Ordered	EP46	3,000.00
			10/31/2023	Ordered	EP47	3,000.00
			11/1/2023	Ordered	EP48	3,000.00
			11/1/2023	Ordered	EP49	3,000.00
			11/1/2023	Ordered	EP50	3,000.00
			11/1/2023	Received	EP51	3,000.00

Currently, we're viewing the data in **Detail View**.

Order Summary by Cost Center

Edit Save... Export Actions

Pivot table Chart Dashboard

Applied Filters

Ordered Date Spanning: most recent 2 Year(s)

Display Options Edit Min/Max rows: 3/8

Click Detail View

Detail View

Cost Center	Commodity (L1)	Common Supplier	Ordered Date	PO Status	Order Id	PO Spend (USD)
Total						158,746.80

Click **Detail View** → **Aggregate View**.

The first screenshot shows a table with columns for 'PO Status' and 'Order Id'. A blue callout box points to the 'Detail View' dropdown menu, which is highlighted with a red box. The second screenshot shows the same table with a dropdown menu open, displaying options: 'Field Settings', 'Edit in Wizard...', 'Show', 'Aggregate View', and 'Detail View'. The 'Aggregate View' option is highlighted with a red box, and a blue callout box points to it.

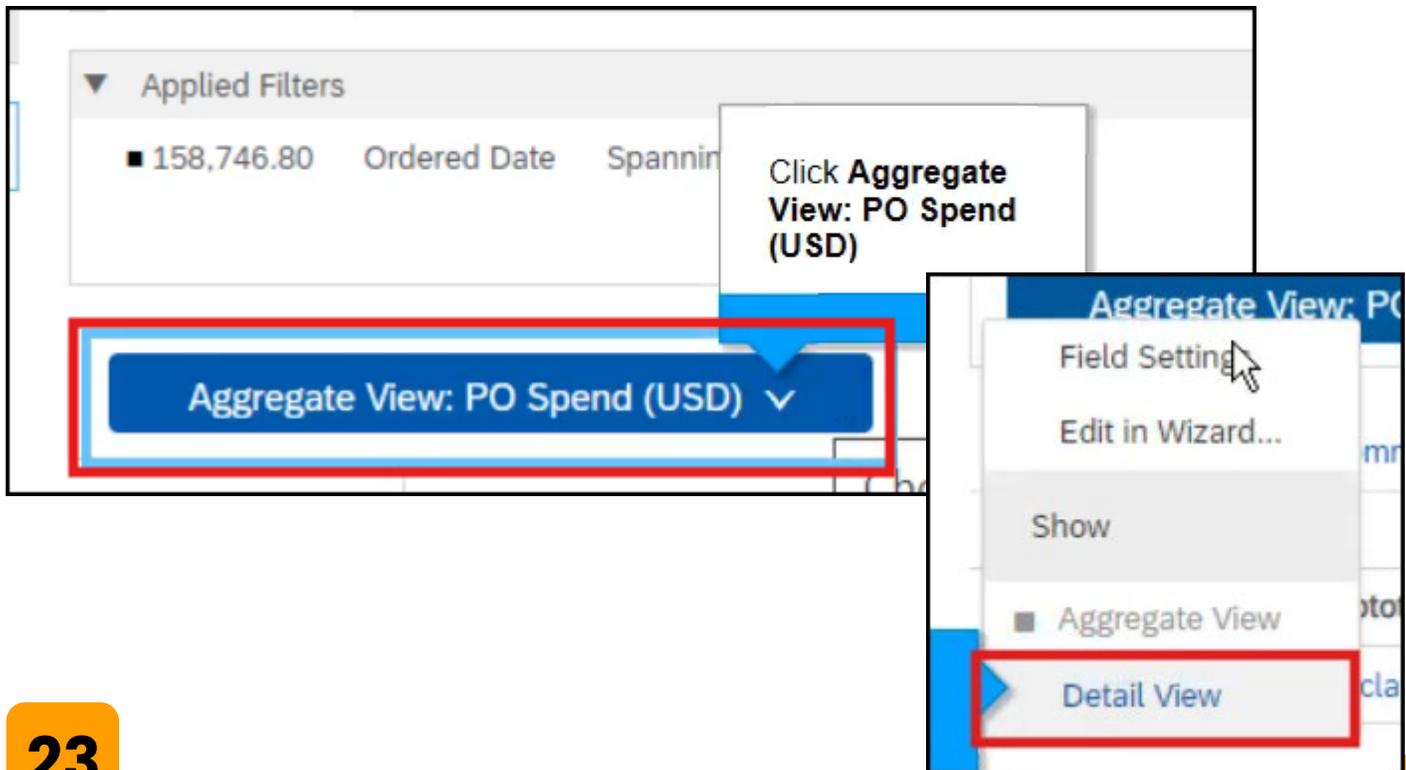
The Aggregate View sorts the data differently.

Aggregate View: PO Spend (USD) ▾

Cost Center	Commodity (L1)	Common Supplier	Total PO Spend (USD)
Total			158,746.80 ▾
BELL SH ▾	subtotal		105,251.80 ▾
	Unclassified ▾	subtotal	105,251.80 ▾
		Cosmic Manifestation ▾	79,215.00 ▾
		ABC SERVICES TEST - TEST ▾	26,004.00 ▾
		AMAZON.COM SALES, INC. AMAZON.COM SERVICES LLC ▾	32.80 ▾
ARIBA-Marketing ▾	subtotal		36,500.00 ▾
	Unclassified ▾	subtotal	36,500.00 ▾
		Creative Amber Productions ▾	36,500.00 ▾
ARIBA-Procurement ▾	subtotal		9,495.00 ▾
	Printing and Photographic and Audio and Visual Equipment and Supplies ▾	subtotal	9,495.00 ▾
		Ariba P2P Test Supplier ▾	9,495.00 ▾
Unclassified ▾	subtotal		7,500.00 ▾
	Unclassified ▾	subtotal	7,500.00 ▾
		Cosmic Manifestation ▾	7,500.00 ▾

22

Review both views and choose the one that best fits your needs. To switch back to Detailed View, click **Aggregate View** → **Detail View**.



23

Click on the **Chart** tab.

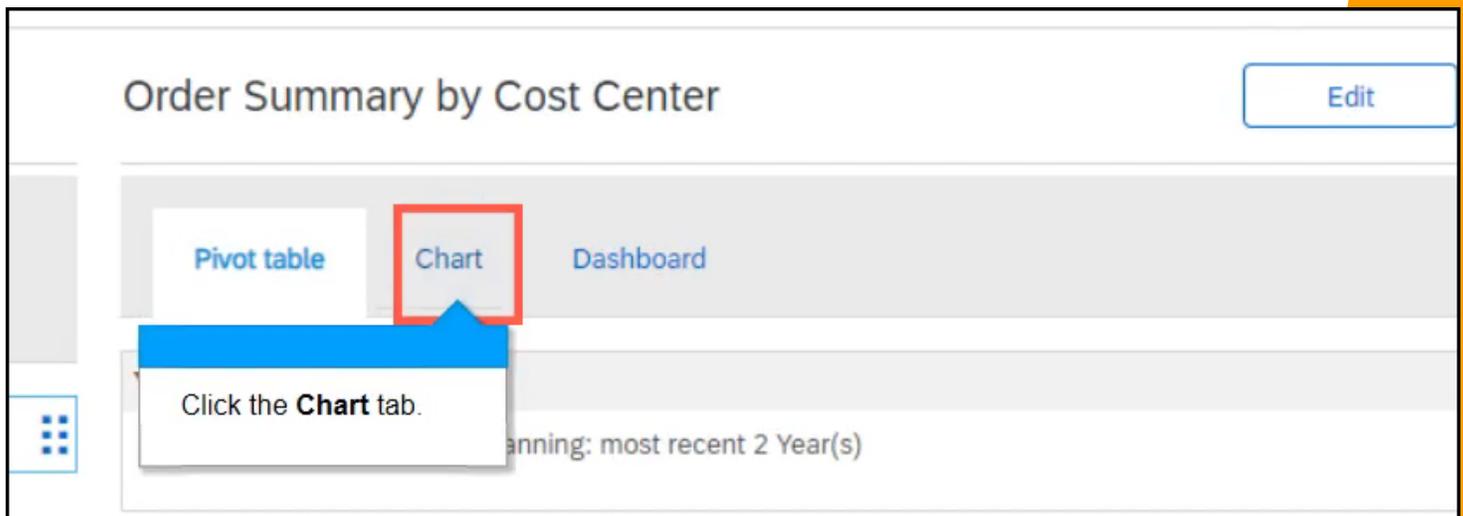
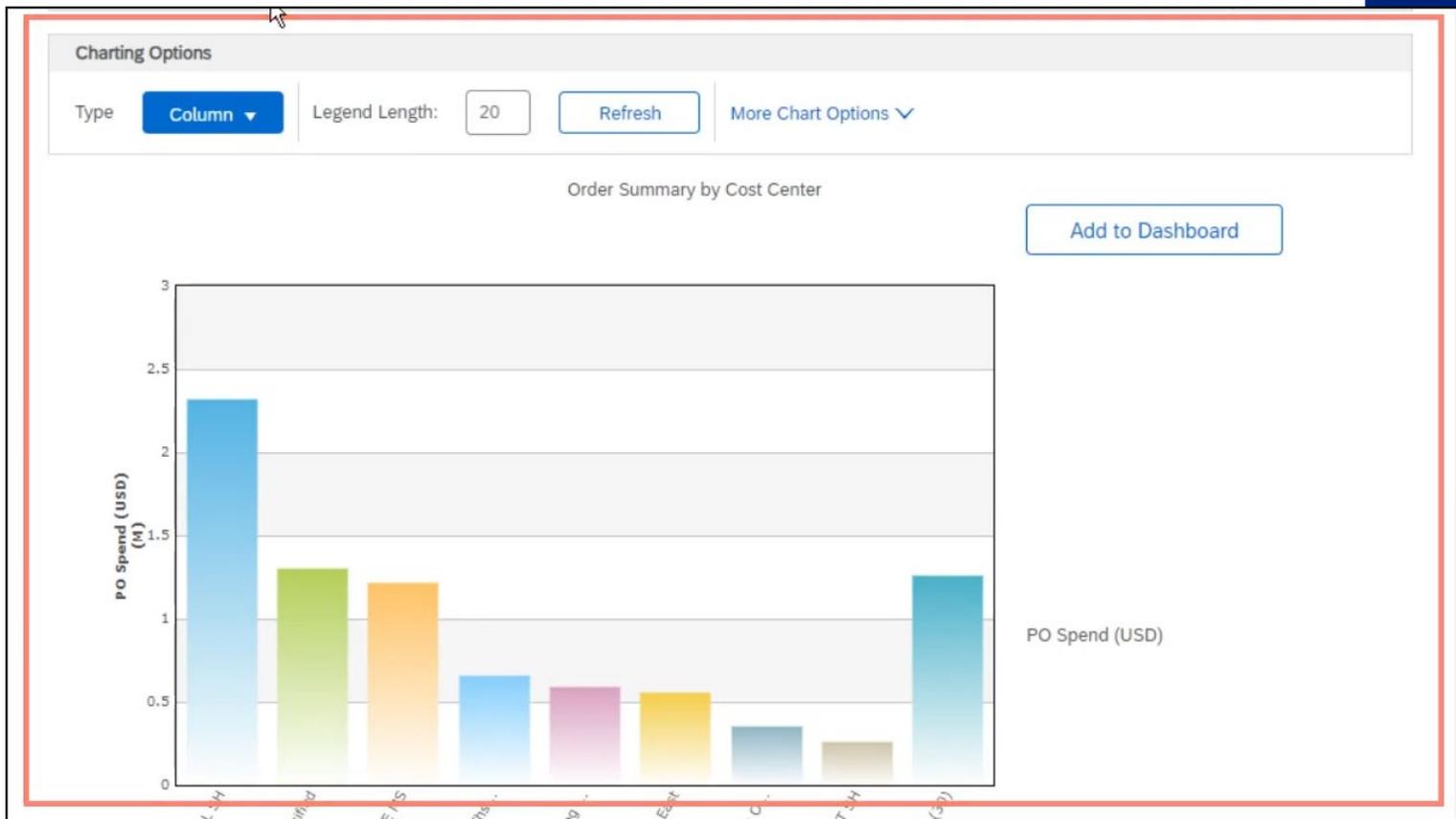
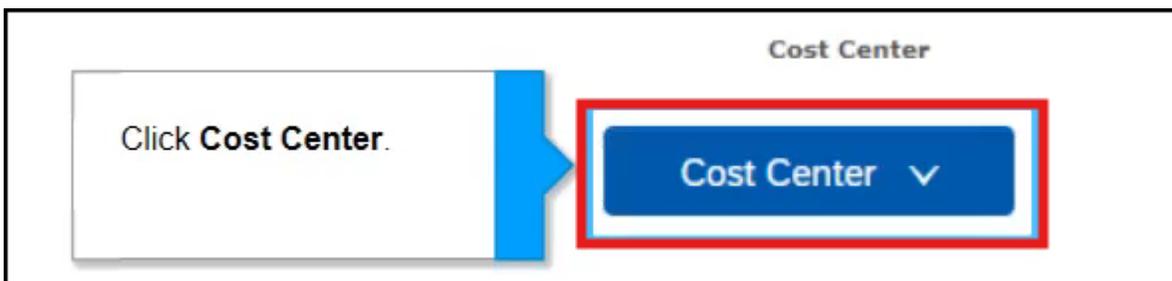


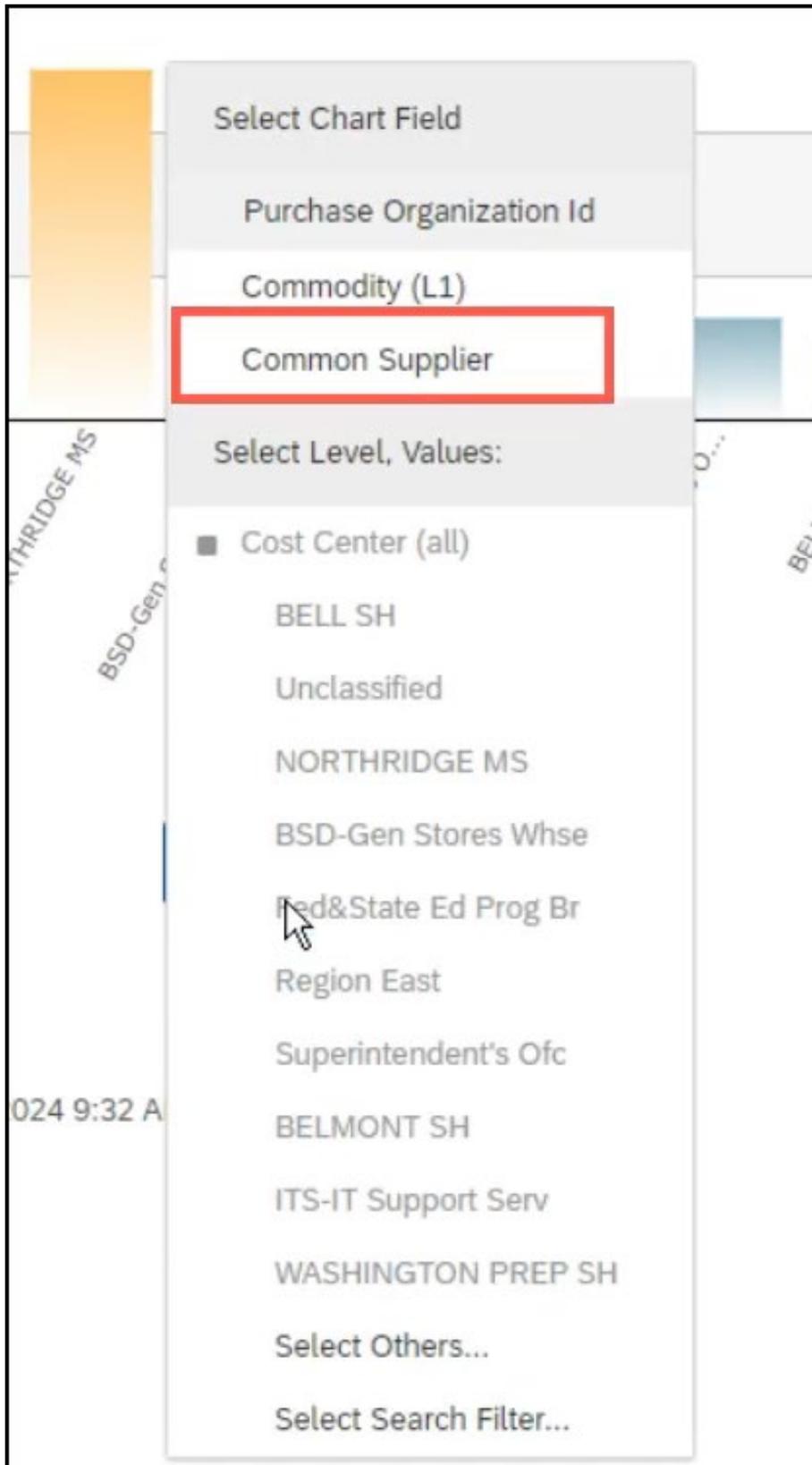
Chart view will open. A graph is created based on your compiled data. In this example, this data is based on purchase order value by Cost Center.



Scroll down and click **Cost Center**.



We can select other values.



# 26

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

A screenshot of a software interface showing a filter selection menu. The menu is titled "Expand Next Level" and "Sort row fields:". Under "Expand Next Level", there are options: "At lowest level", "Select Level, Values:", "Cost Center (all)", "Unlassified", "NORTHRIDGE MS", "BSD-Gen Stores Whse", "Fed&State Ed Prog Br", "Region East", and "Superintendent's Ofc". The "Cost Center (all)" option is expanded, and "BELL SH" is highlighted with a red box. A blue arrow points to the "BELL SH" option. The "Sort row fields:" section includes "Descending", "Ascending", "Move Field", "Left", "Right", "Show Field On", "Rows", "Columns", and "Page".

# 27

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

A screenshot of a report interface showing a table of data. The table is filtered by "BELL SH". The table has columns: PO Id, Ordered Date, Requester, GL Account Id, ERP Supplier, GL Account Name, Cost center ID, PO Spend (USD) ↓, and Tax Amount (USD). The table shows a total of 8,540,646.09 and 408,761.42. The data rows are:

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 Pivot table **Chart** Dashboard

Page Others

▶ Order Id ⋮

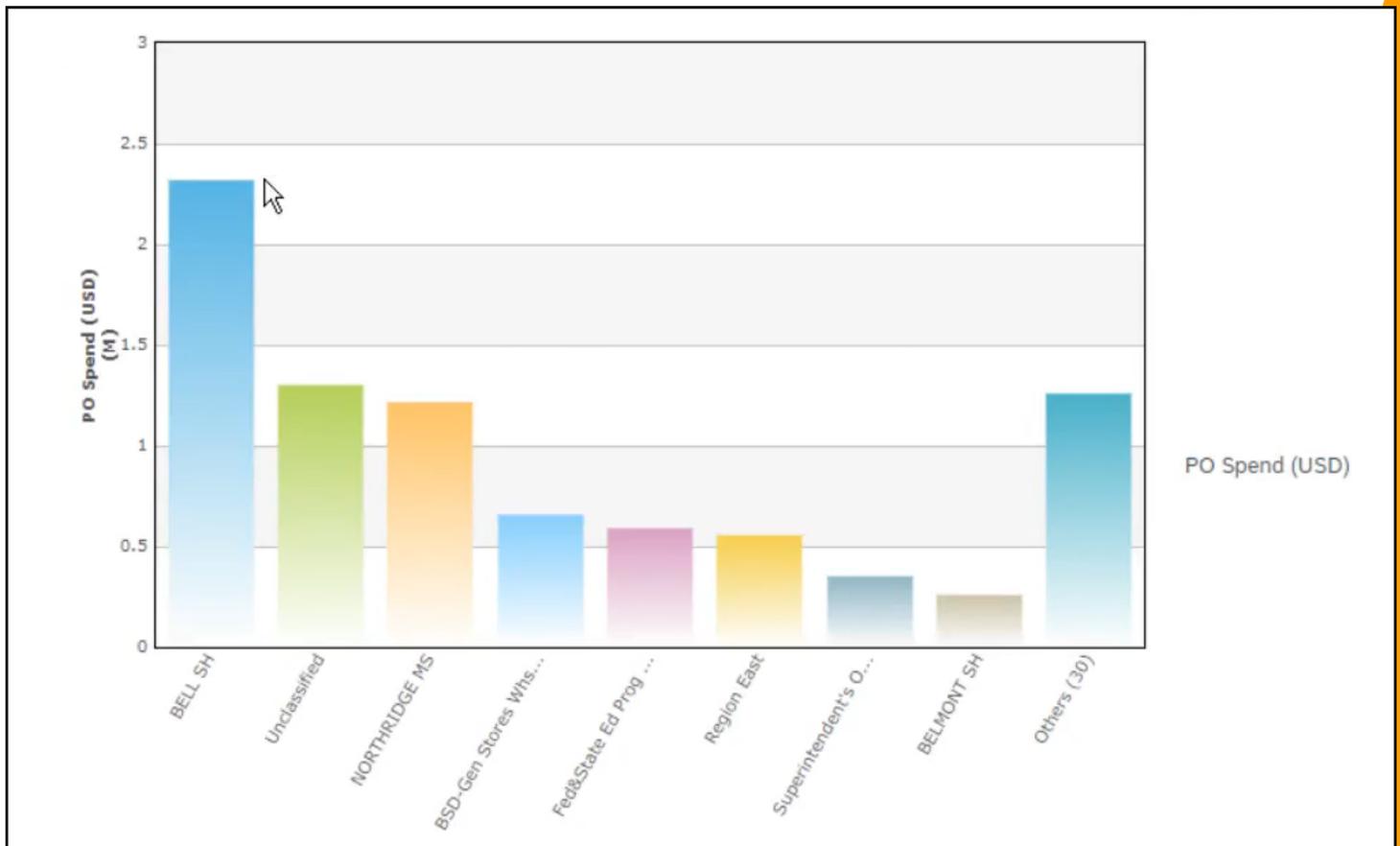
▶ Purchase Organization Id ⋮

Date Spanning: most recent 2 Year(s) Display Options Edit  
Min/Max rows: 3/8

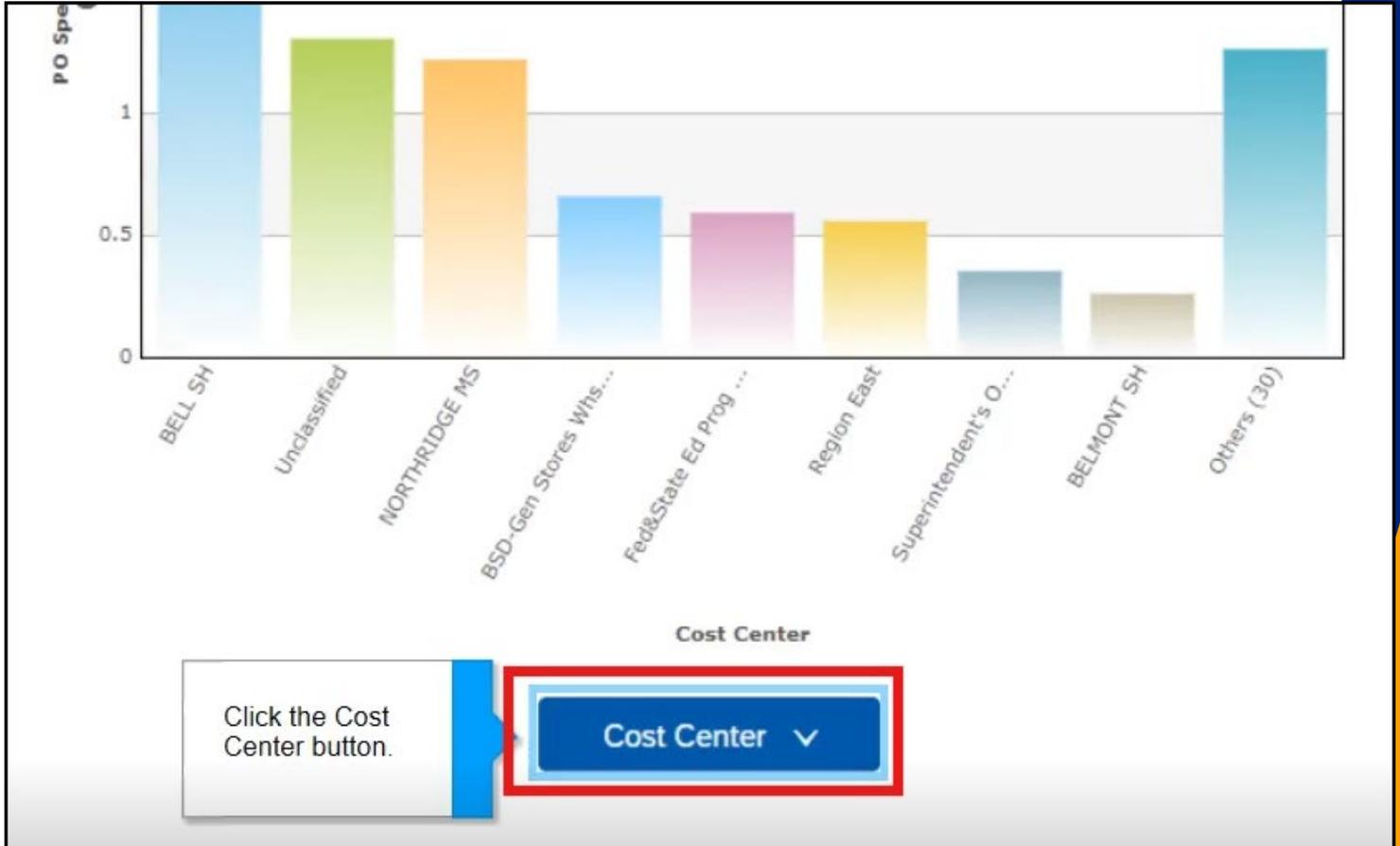
Detail View ▾

Click the **Chart** tab.

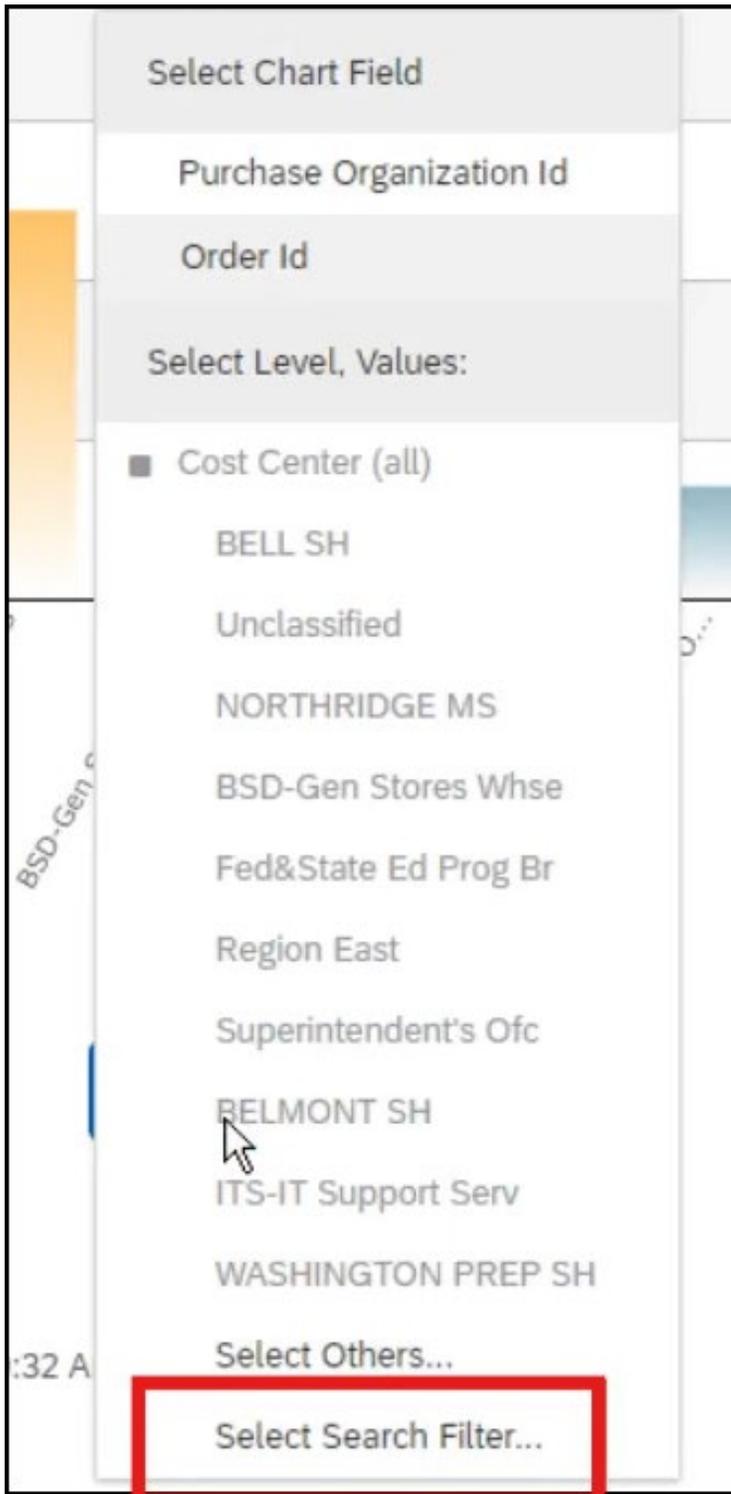
A column chart has been automatically generated to provide a visual representation of purchase order spending categorized by Cost Center.



Scroll down → click **Cost Center**.



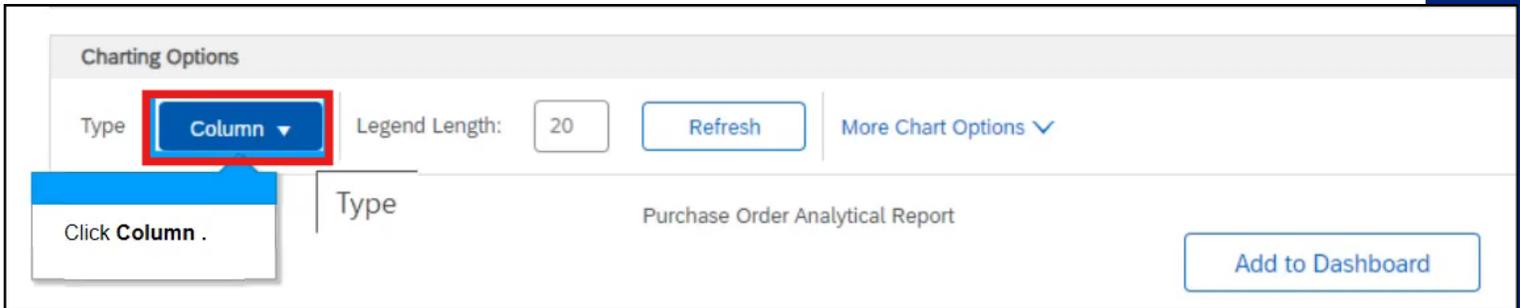
This menu allows you to change the details of this graph.



31

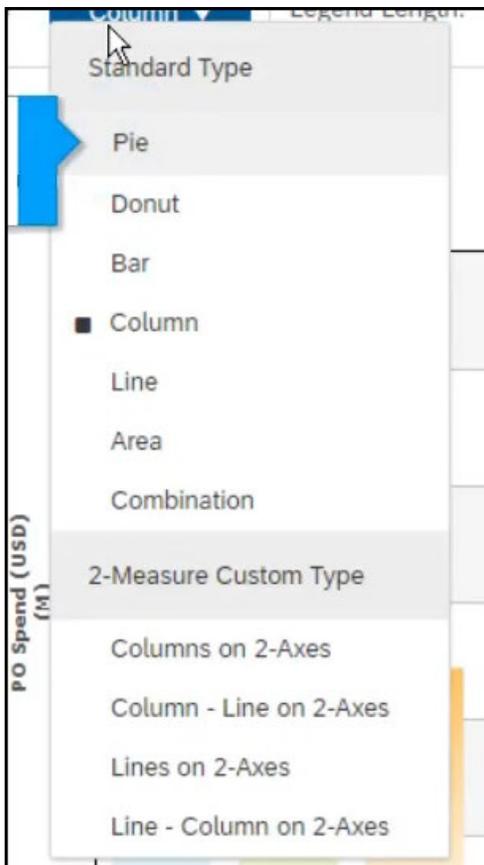
Charting Options Type allows us to change the type of graph.

Click **Column**.



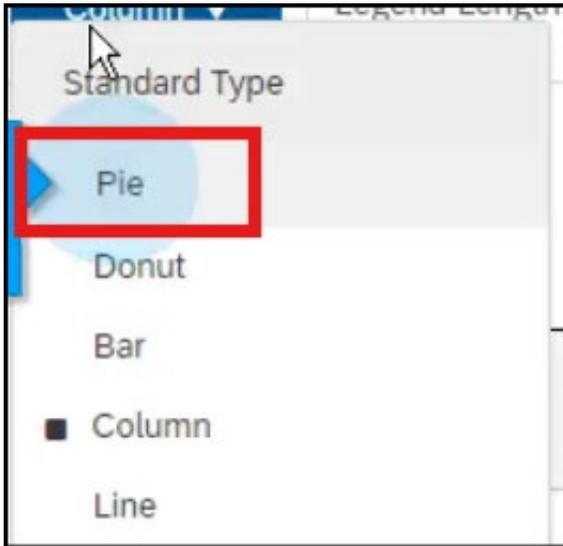
32

There are many graph types to choose from.



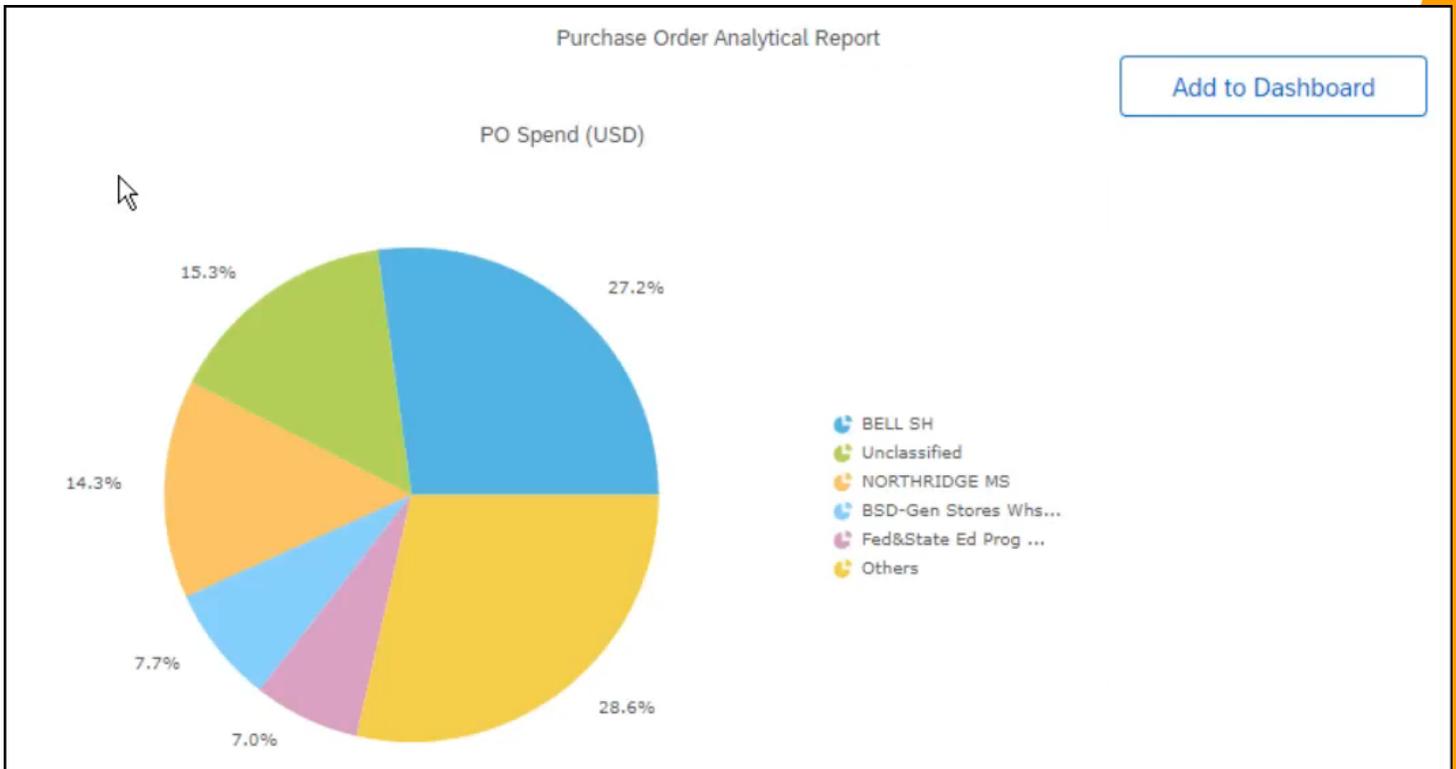
33

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



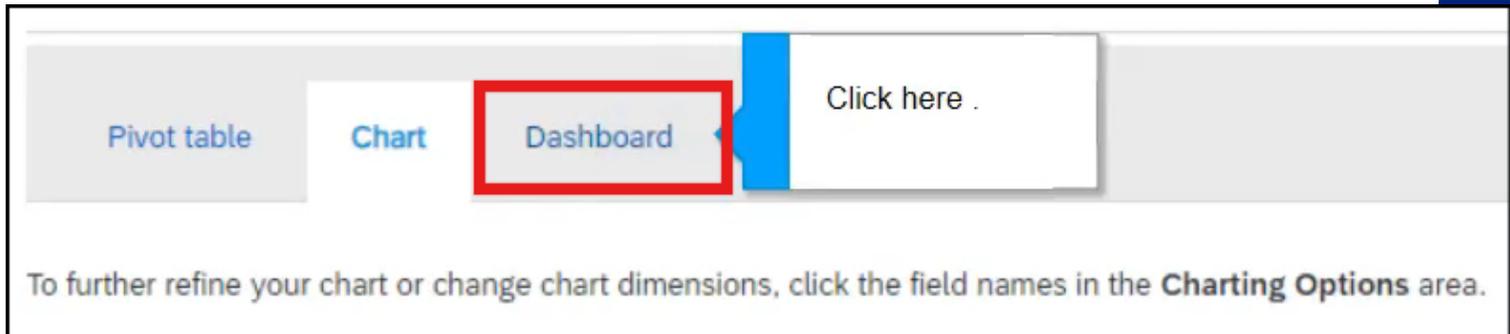
34

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



35

Click on the **Dashboard** tab.



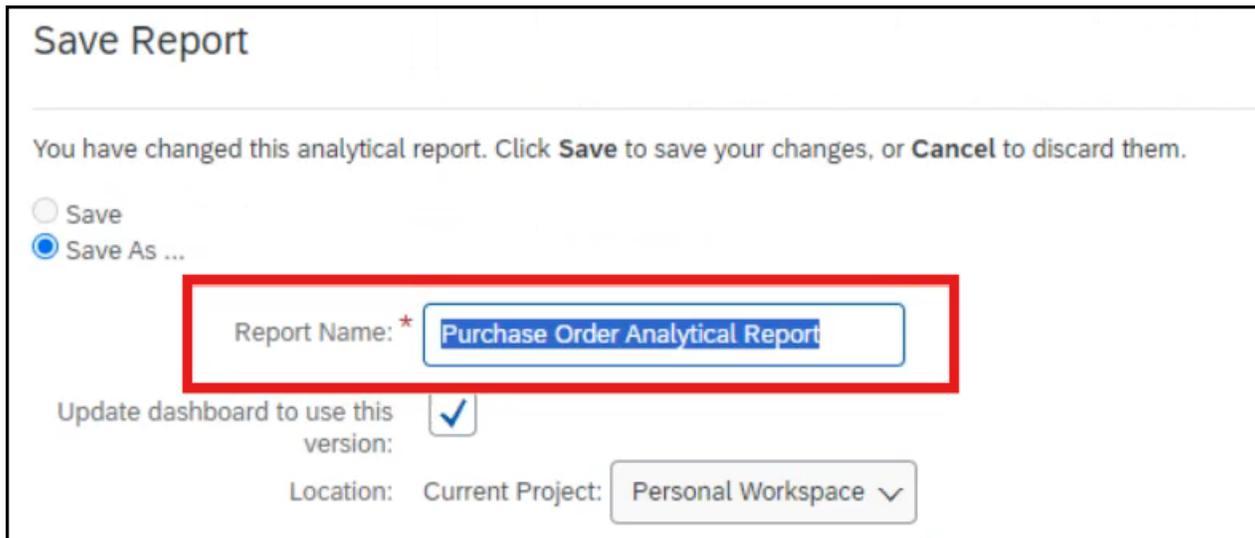
36

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.

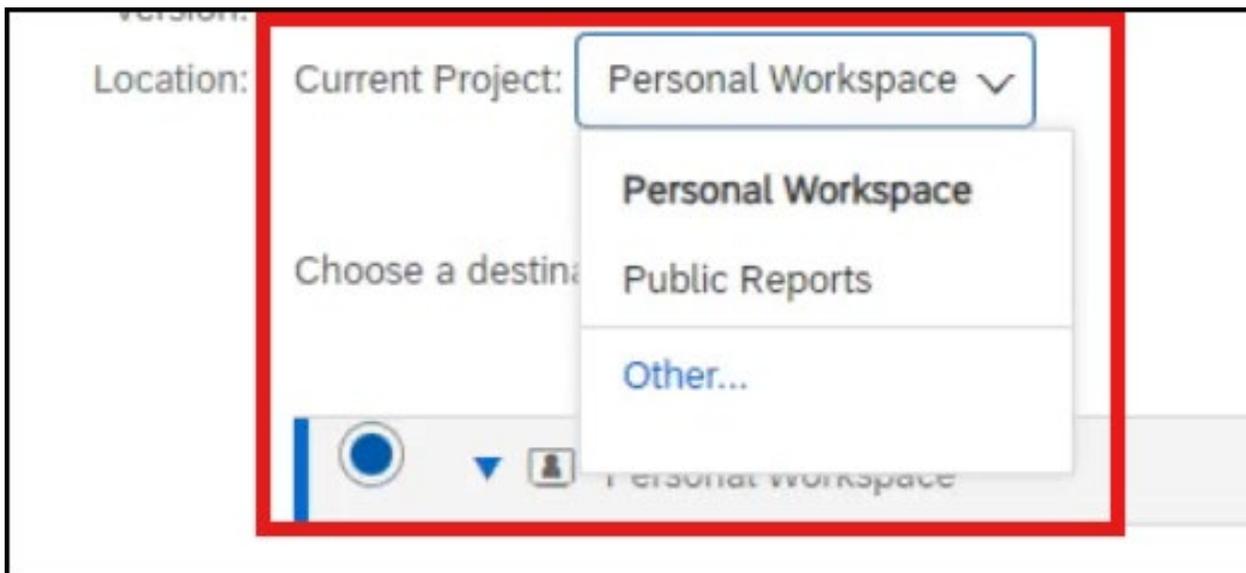
Save  
 Save As ...

Report Name: \*

Update dashboard to use this version:

Location: Current Project:

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:

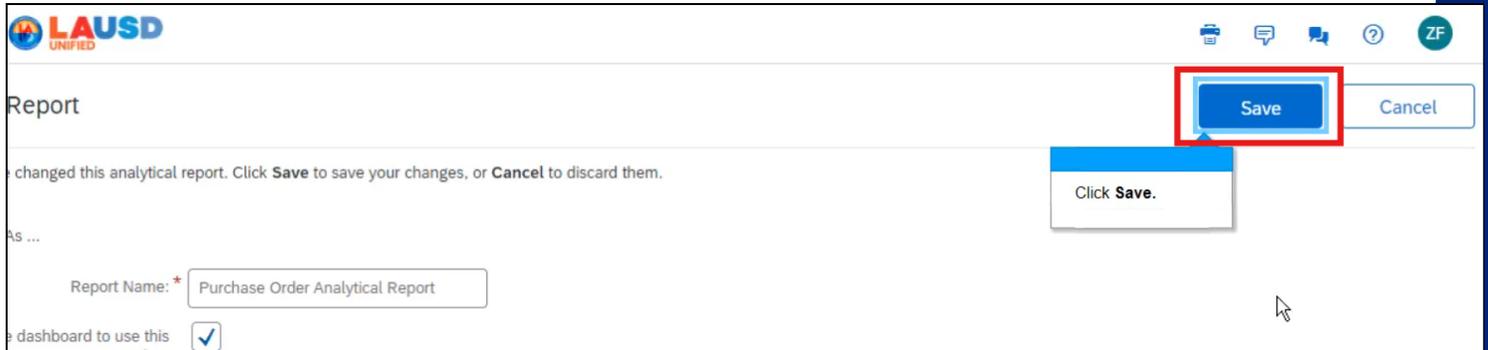
Choose a destination:

- Personal Workspace
- Public Reports
- Other...

Personal workspace

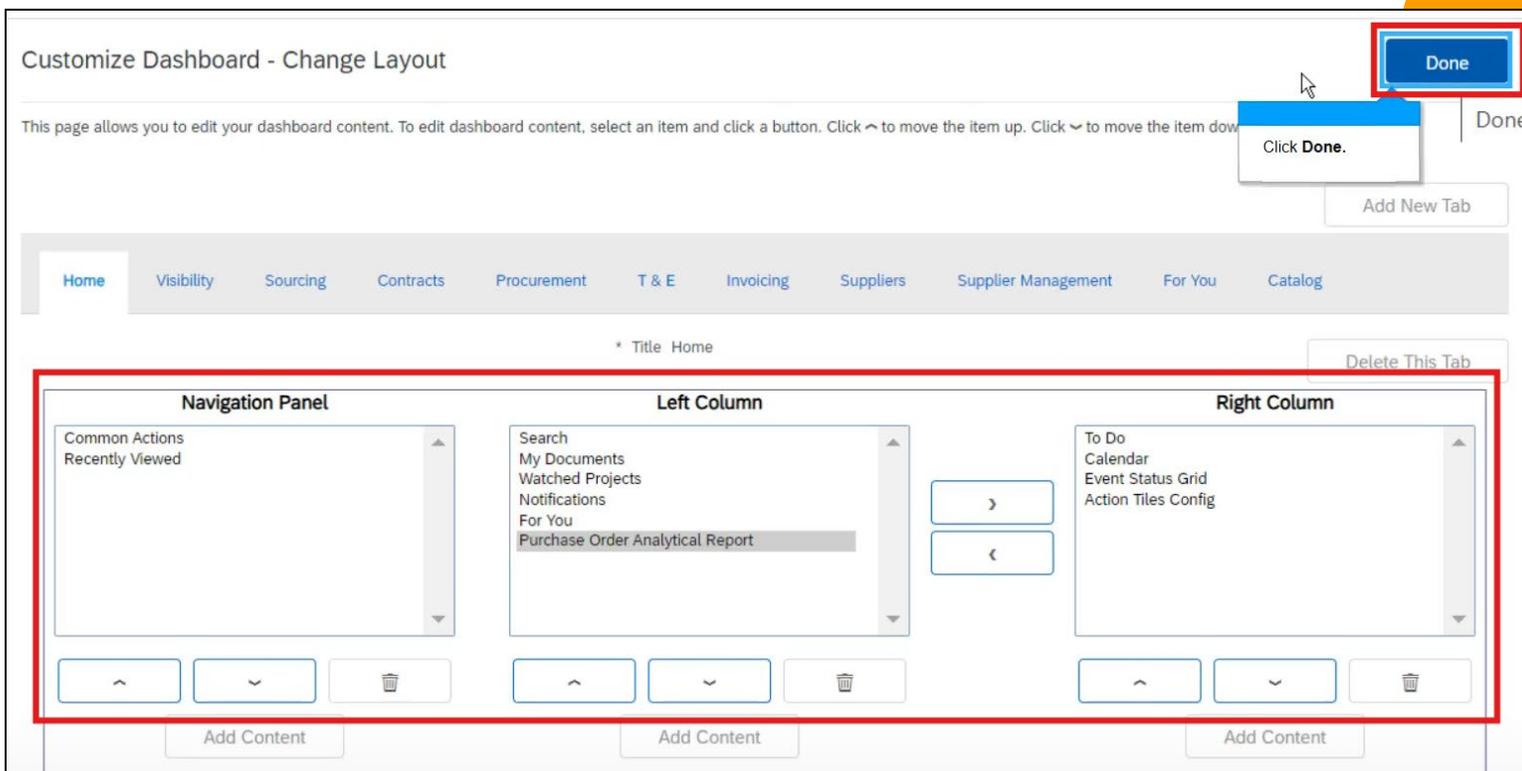
39

Click **Save**.



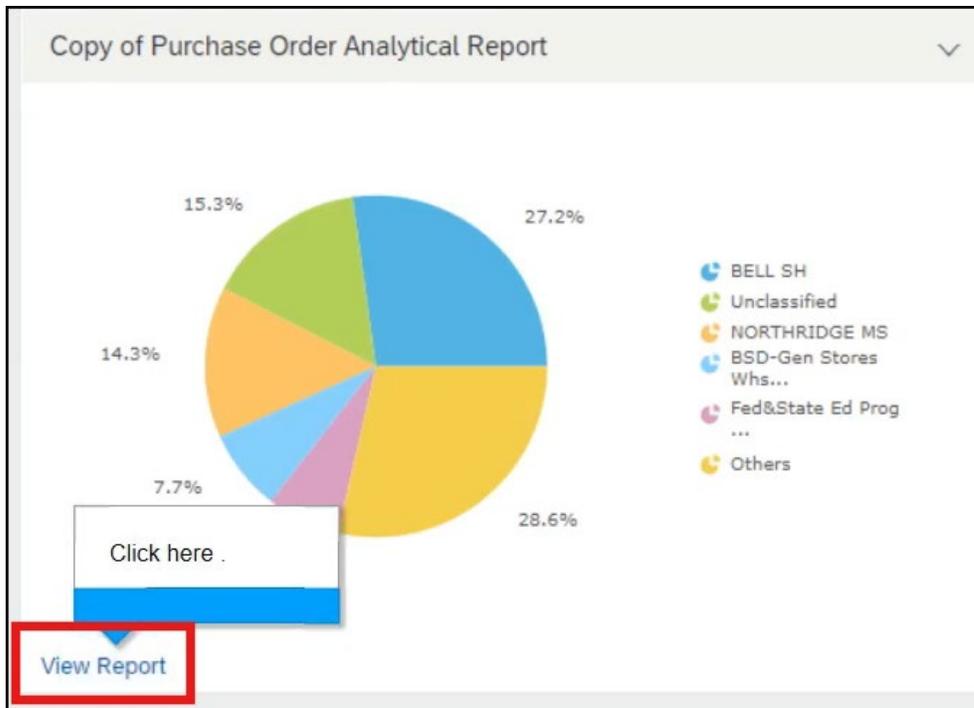
40

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



41

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.

LAUSD UNIFIED

Reporting Copy of Purchase Order Analytical Report

Edit Save... Export Actions

Field Browser

Page Others

Order Id

Applied Filters

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

Display Options Edit Min/Max rows: 3/8