SAP Ariba

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Running Analytical Reports

SAP Ariba cloud solutions

SAP

Content

Running Analytical Reports

This guide is for SAP Ariba buyer users and describes how to run analytical reports, filter and drill down into data, schedule reports to run in the background, and export reports for offline analysis.

This guide applies to:

- SAP Ariba Buying
- SAP Ariba Buying and Invoicing
- SAP Ariba Contract Invoicing
- SAP Ariba Contracts
- SAP Ariba Catalog
- SAP Ariba Invoice Management
- SAP Ariba Sourcing
- SAP Ariba Spend Analysis
- SAP Ariba Strategic Sourcing Suite
- SAP Ariba Supplier Information and Performance Management (classic architecture)
- SAP Ariba Supplier Information and Performance Management (new architecture)
- SAP Ariba Supplier Lifecycle and Performance
- SAP Ariba Supplier Risk

Related Guides

Creating Report Export Templates

Using Advanced Reporting Features

Reporting Fact Reference

Prepackaged Report Reference

Creating Compound Reports

Creating Analytical Reports

Procurement and Invoicing Reporting Basics

Key Concepts About Running SAP Ariba Reports

SAP Ariba's analytical reports give you access to complex business information from multiple sources, such as purchase orders, invoices, events, surveys, contracts, or requisitions. Reports display data from these sources on a pivot table, which you can manipulate to see different scenarios for the data. Pivot tables allow you to filter, slice, and drill down into the information as needed to see broad patterns and relationships, summary information, and detail at the same time.

Facts, Dimensions, and Hierarchies

Reporting facts store the basic transactions you want to investigate when you run a report, such as invoices, purchase orders, contracts, or events. When a transaction occurs, for example, an invoice is approved, the facts affected by the transaction updates to reflect the changes. Facts include all aspects of a transaction—IDs, dates, amounts, suppliers, commodities, departments or cost centers, regions, and so forth. Each fact stores data for one type of transaction.

Reporting dimensions store reference information for data that is shared across facts, such as commodities, suppliers, departments or cost centers, regions, or the users in your company. Dimension data is typically updated less frequently by an administrator at your company; it does not come from transactions.

SAP Ariba reporting allows you to run a report on the transactions in facts and use related dimension data to examine various aspects of your company's activity. The fact gives you all of the information about the individual transactions. Dimension fields on the report give you access to all of the related dimension data. For example, a report about the invoice fact could display the Company Name field from the Supplier dimension, the City field from the Region dimension, the Commodity Type field from the Commodity dimension, and the Department field from the Department dimension.

Many facts share the same dimension data. For example, if you have both an event and a contract with XYZ Company, both event and contract facts use the supplier dimension to store detailed information about XYZ Company. Dimensions can store data in different levels. Those levels are organized in a top-down structure called a hierarchy, which progresses from general to specific information.

In a report, you can display a high-level summary using the top level of the hierarchy, or you can expand the report view to display detailed information from the lower levels of the hierarchy. For example, you can see invoice data for all of your Corporate departments or for divisions at lower levels within the Department hierarchy.

Within the Region dimension, there might be levels for the USA, Asia, and Europe and the Middle East, among others. Within Europe, there might be levels for the UK, France, Belgium, and the Czech Republic, among others. When you work with these hierarchy levels in reports, the levels are referred to as L1, L2, L3, and so forth.

A dimension can have more than one hierarchy. For example, a Time dimension can be divided into two hierarchies: Calendar and Fiscal. Each of these hierarchies can contain multiple levels. For example, the Calendar hierarchy could contain one level for calendar year, another level for calendar quarter, and others. The Fiscal hierarchy could contain one level for fiscal year, another level for fiscal quarter, and others.

Measures

Each fact includes a number of pre-defined calculated fields called measures. Measures contain numerical data values such as the number of lines in invoices, the lead bid amounts from events, the count of contract workspaces, or the maximum and minimum unit prices in purchase orders. Reports can display subtotal and total information from measures and roll detailed numbers up into aggregates.

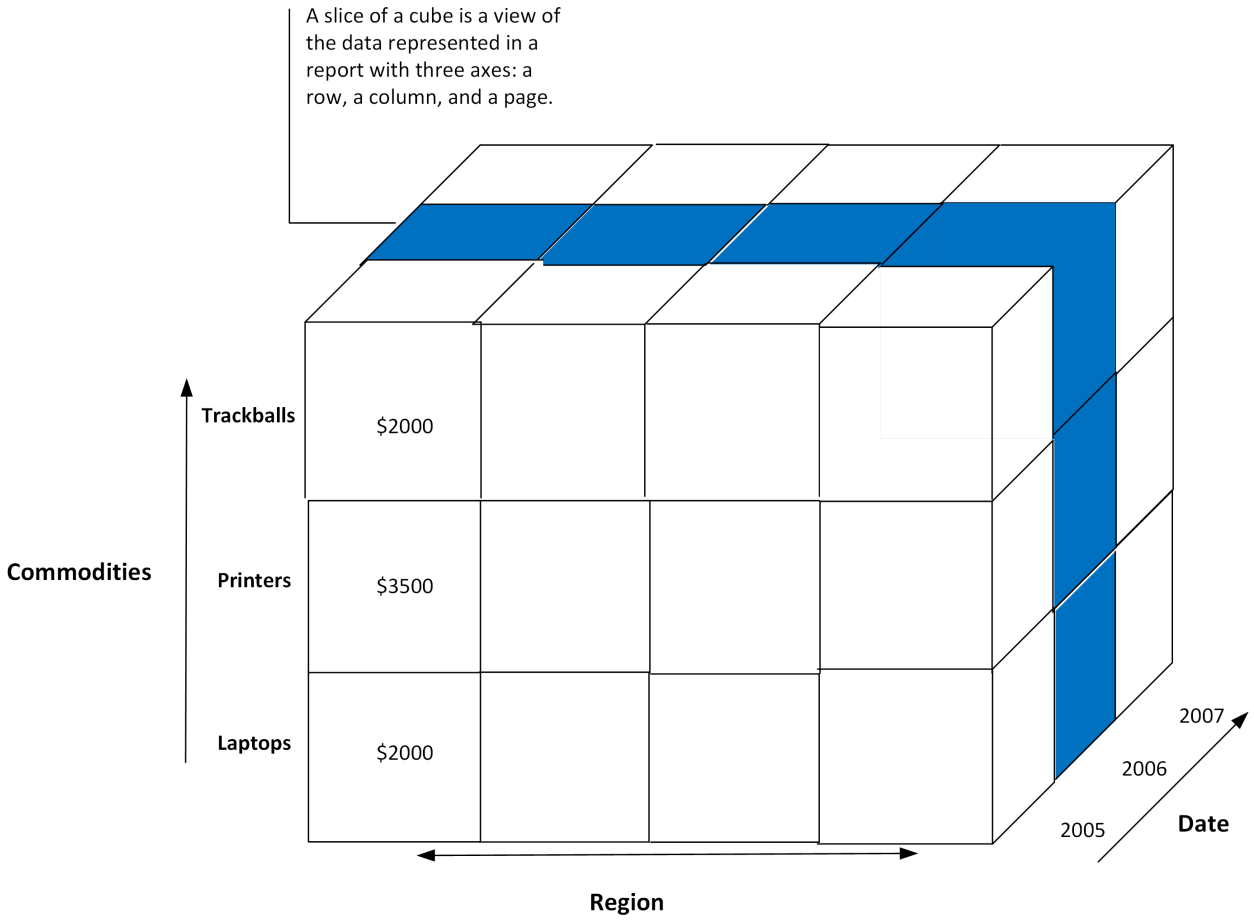
Measures can be numerical data, calculations from computed fields, or aggregations of numerical data. If you have permission to create analytical reports, you can create user-defined fields (also called computed fields or derived measures) to create custom measures with calculations based on other measures. Measures are always values that can be calculated, such as invoice amounts number of bids submitted contract amounts invoice amounts; reports also show data such as suppliers, but since the name of a supplier is not a value that can be calculated, it is not a measure.

Data Cubes on the Report Pivot Table

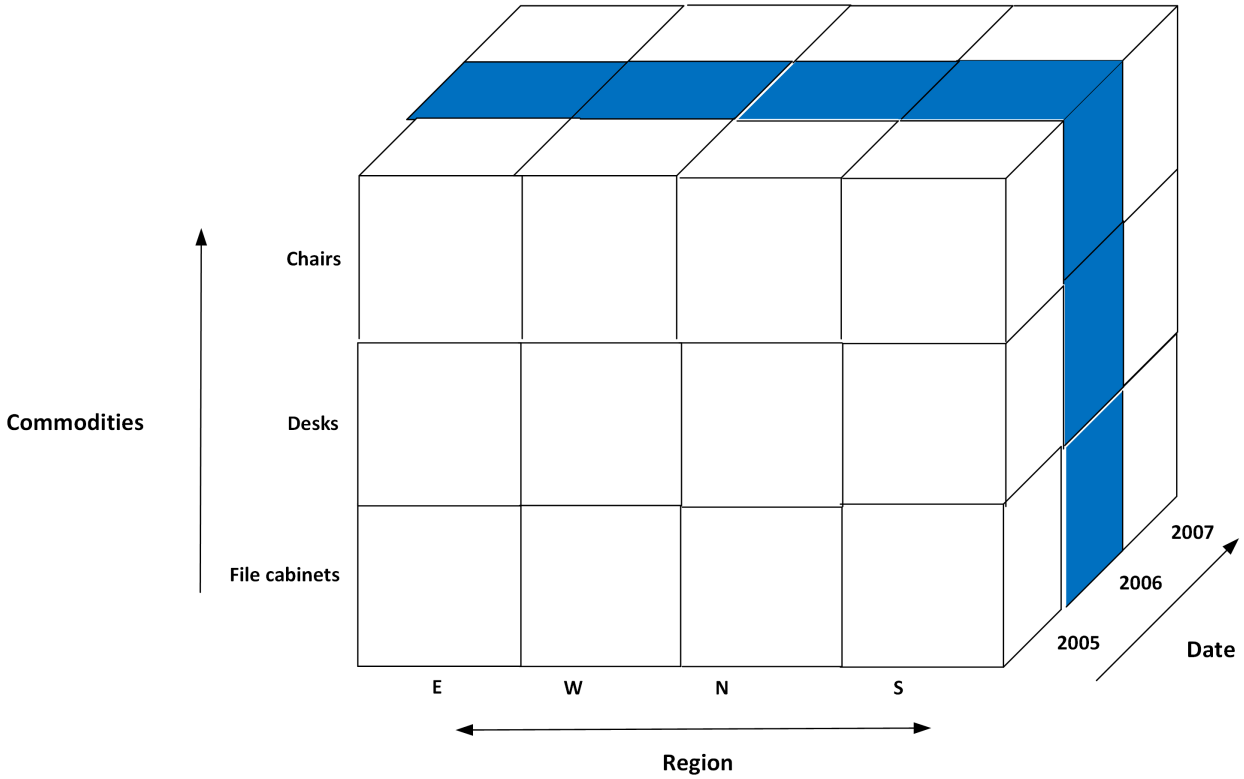
A traditional spreadsheet or relational database shows a two-dimensional view of business data with data cells arranged in rows and columns. For example, the following spreadsheet shows a two-dimensional view of business information: purchases (measure) by geography over time (dimensions):

Date Dimension →	**2005**	**2006**	**2007**	
Region Dimension ↓				
East	$7,500	$3,450	$8,000	*Measure (purchases)*
West	$5,000	$6,500	$4,000	
North	$9,000	$8,700	$7,600	
South	$7,600	$4,300	$2,300	

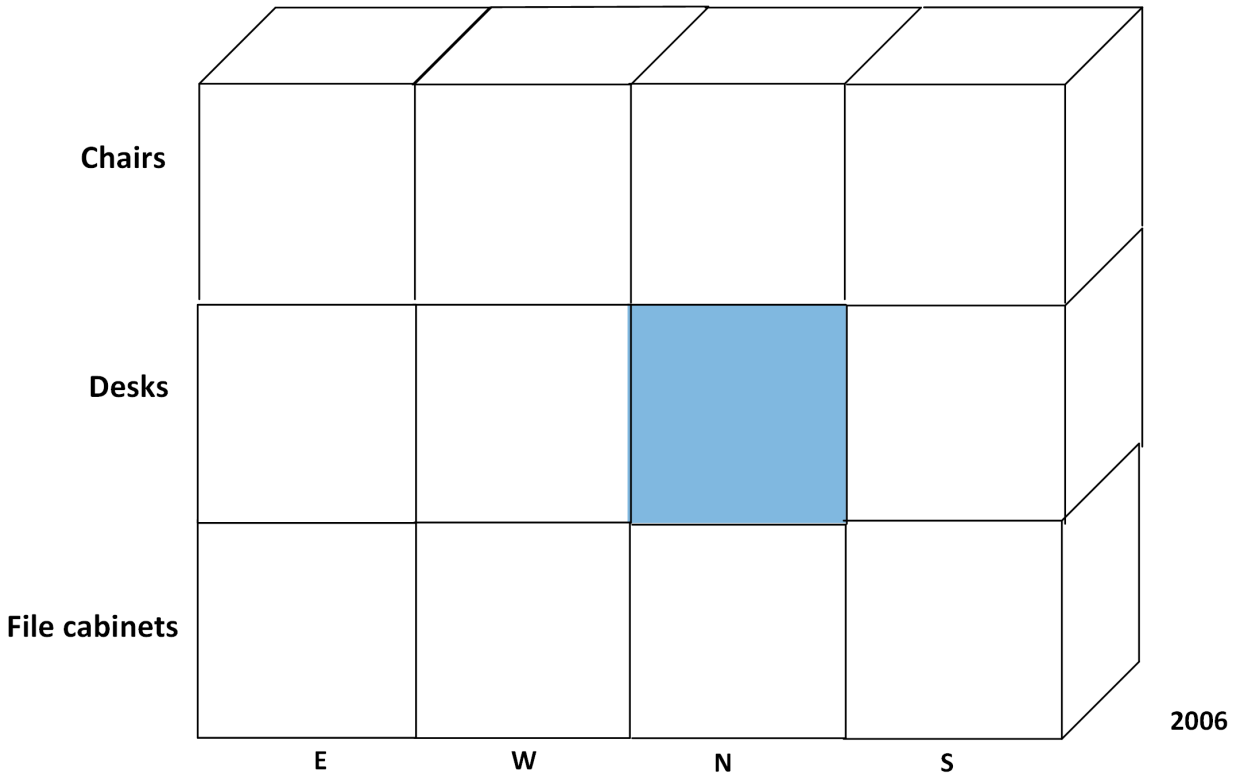
SAP Ariba reports can show several dimensions and data fields at once, and those dimensions and data fields can be represented by a cube. Each dimension forms a side of the cube.The following cube represents three dimensions: commodities, region, and date:



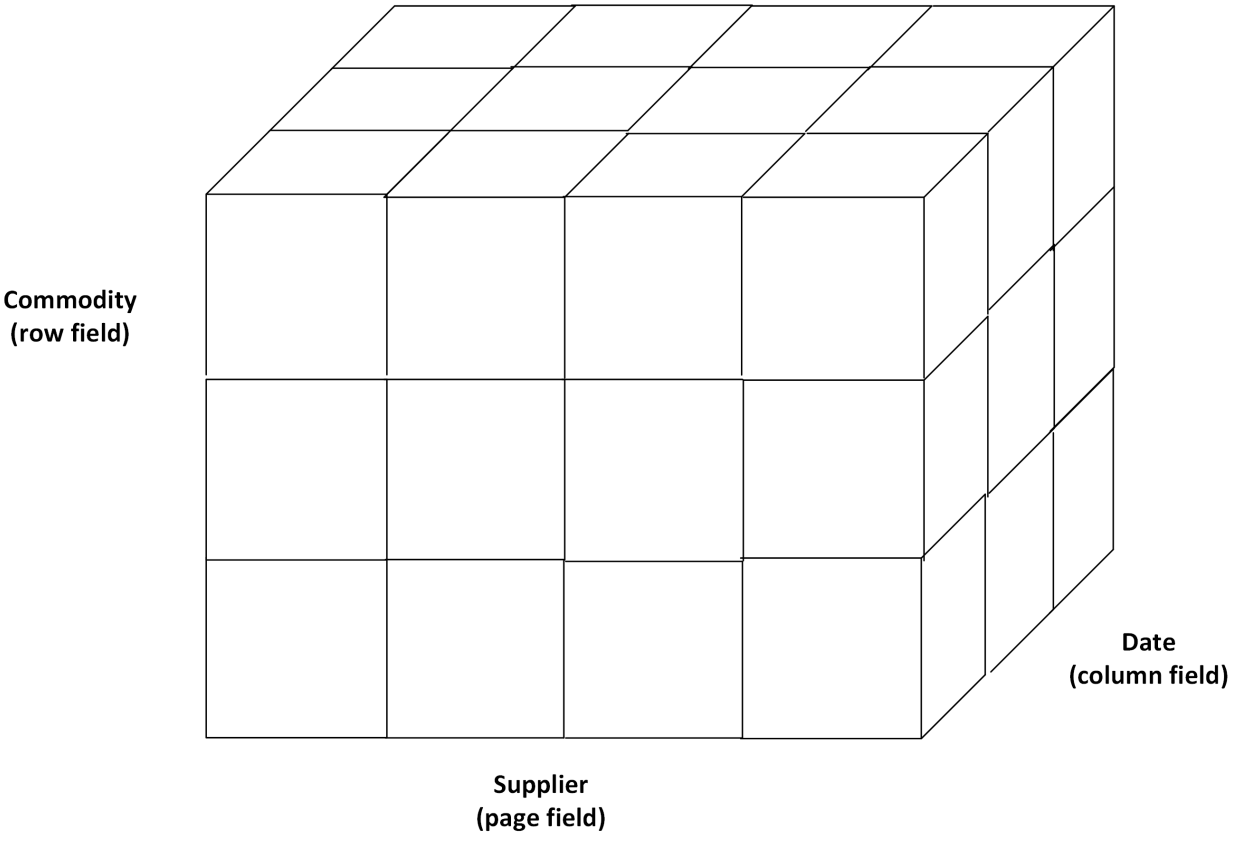
Slicing through the cube focuses analysis on specifics, such as data for the year 2006. In the following representation, the blue slice represents purchases for three commodities in all regions for the year 2006:



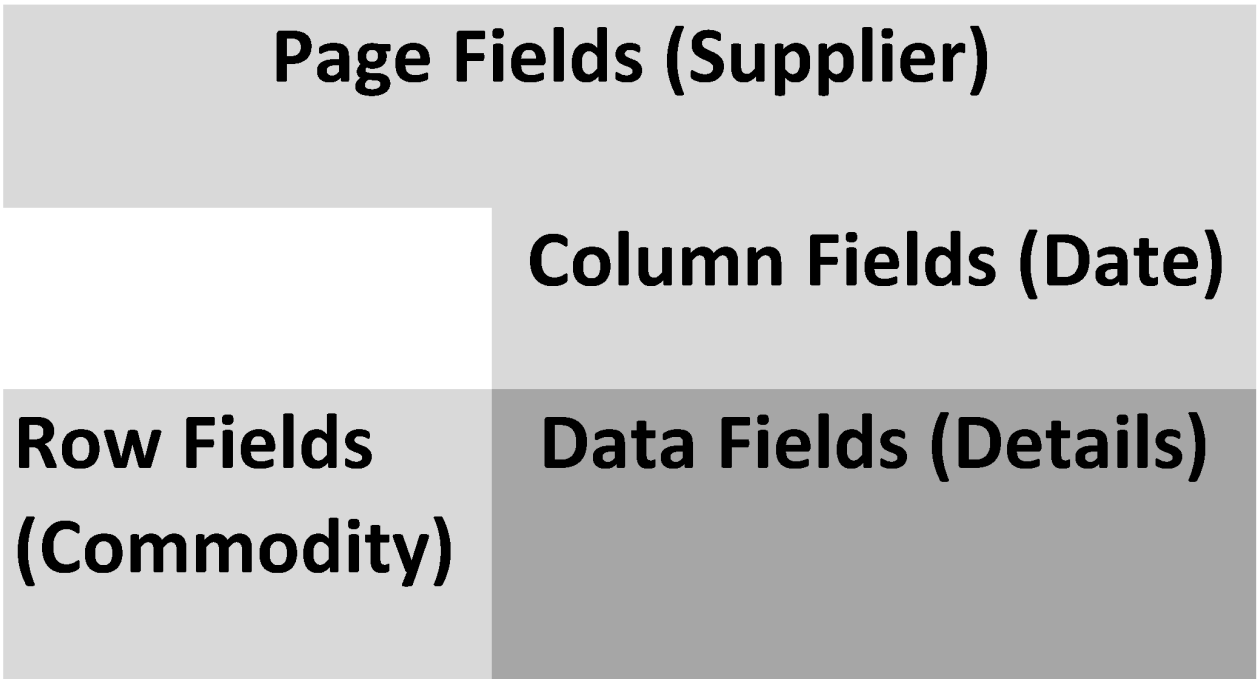
Dicing focuses on one cell of the cube: for example, what was the purchase figure for desks in the northern region for 2006?



Any dimension in a cube can be represented by a page field, row field, or column field on a spreadsheet.

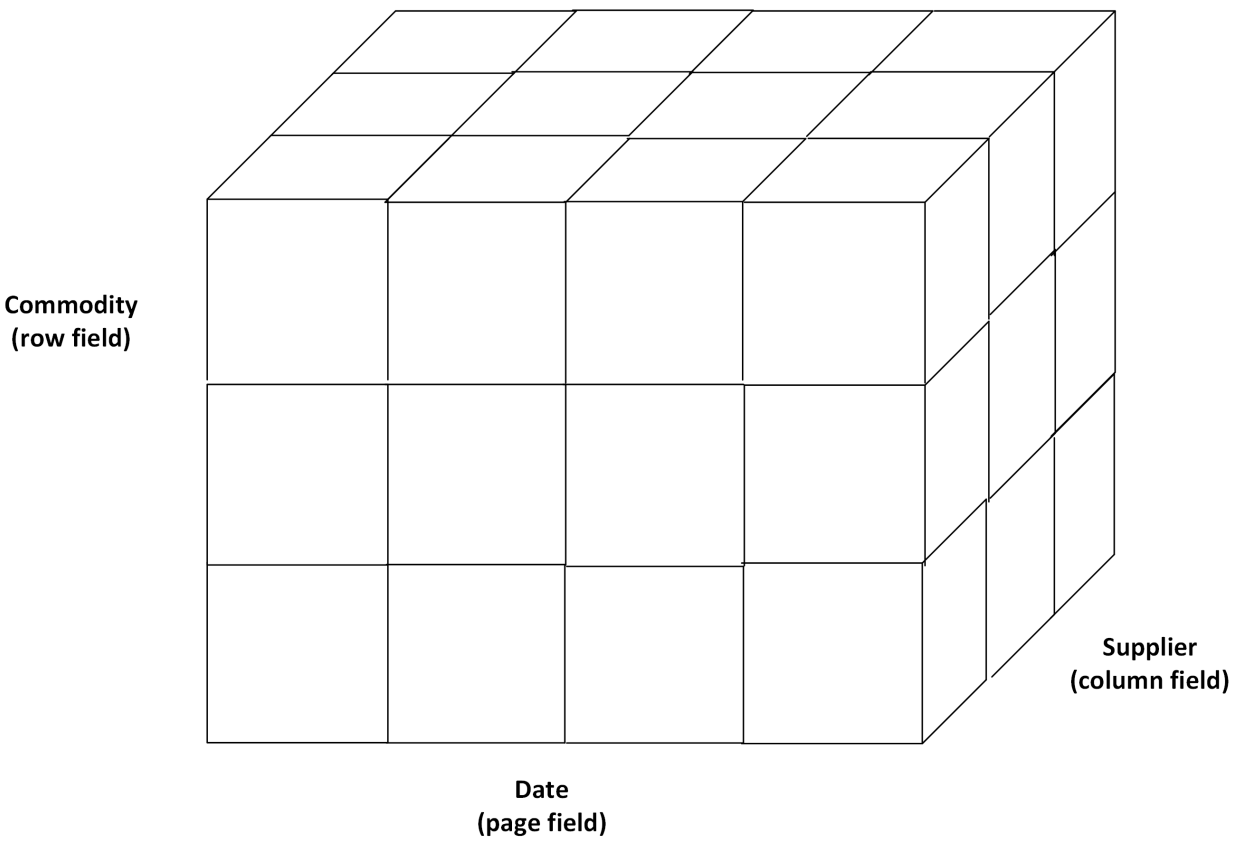


For example, you can create a spreadsheet with Supplier as the page field, Date the column field, and Commodity the row field. The data fields provide the values for the commodities by time and supplier

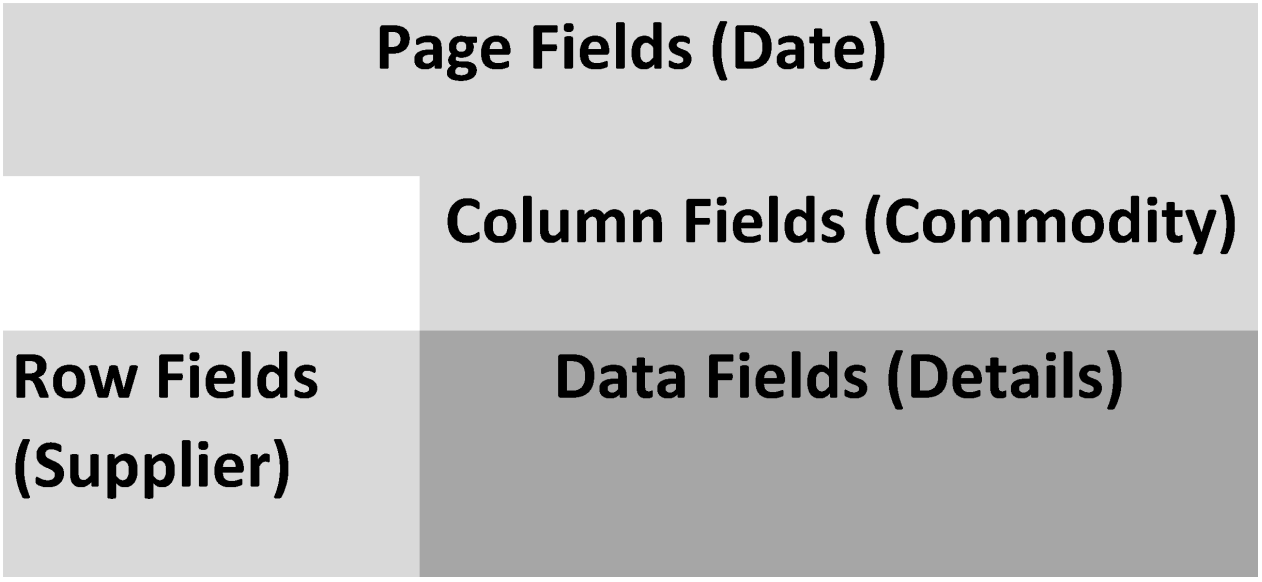


The page fields act as filters on the other fields. For example, if you make Supplier a page field, the report can show the row and column data for all suppliers, or for just one supplier. Column fields correspond to the columns in a traditional spreadsheet. Row fields correspond to the rows in a traditional spreadsheet.

By shifting or rotating the dimensions, you can manipulate the pivot table to reveal new views of the data.



You can change the perspective from "commodities purchased over time by supplier" to "commodities purchased by supplier for a specific time period."



Pivot Table Overview

You use row fields, column fields, page fields, detail fields, and data fields to examine different aspects of report data. Your ability to use fields on a pivot table is determined by the kind of report you are viewing and the Ariba Spend Management solution your company has purchased.

You can use the following methods to manipulate data on the pivot table.

Drilling Down

Drilling down lets you navigate from a summarized value down through different levels of data down to the most detailed data, narrowing down your view of the data to a smaller focus. For example, if you drill down into figures for the Americas by one level, the report shows data only for the Americas. You can then drill down further into departments for a single region in the Americas.

Rolling Up

Rolling up summarizes (or aggregates) the data by climbing up the hierarchy, showing you the big picture. For example, rolling up a date hierarchy could roll up from month, to quarter, to year, aggregating monthly values into quarterly totals and quarterly values into yearly totals.

Slicing

Slicing cuts through a data cube, through a series of drilling down and rotating operations, so that you can focus on a specific perspective. For example, you might want to analyze commodity data for only one quarter or supplier.

Dicing

Dicing narrows the data down to one data point. For example, you can find out how many invoices generated by a single unit of your company from a single supplier are in the reconciliation process and whose reconciliations have been approved.

Dicing is most useful when you are working in aggregate view, with summary totals of invoice, purchase order, contract, or travel and expense data.

Pivoting

Pivoting, or rotating, the pivot table, allows you to swap rows, columns, and page fields to rearrange the data cube. You can quickly switch from a report showing spend on copier paper for North America by month, to showing spend in North America for all office supplies for the last two years.

Expanding and Collapsing

Expanding a field shows several levels in a hierarchy at once. For example, you can show years, quarters, and months on a report at the same time. Collapsing rolls up to a higher level in a hierarchy, such as from months to a year.

You must have permission to run reports. In SAP Ariba Procurement solutions, your view of the data depends on your role.

SAP Ariba Sourcing Basic solutions allow users to run reports but not to create, edit, or save them.

In solutions that include SAP Ariba Sourcing, SAP Ariba Contracts, Ariba Supplier Information Management, or SAP Ariba Supplier Information and Performance Management and do not use reporting data access control, users can see all project data in reports without restriction.

In solutions that include SAP Ariba Sourcing, SAP Ariba Contracts, Ariba Supplier Information Management, or SAP Ariba Supplier Information and Performance Management and do use reporting data access control, users who are members of the Full Reporting Access Authorized group can see all project data regardless of project team membership. Users who are not in the Full Reporting Access Authorized group can only see data in reports for the projects to which they have access based on project team membership.

In SAP Ariba strategic sourcing solutions members of the Analyst global user group are limited in the way they can use reports. They can:

- Run reports, including prepackaged and public reports, but not create, edit, or save reports.
- Drag and drop row and column fields on the pivot table to move them around, but not filter or drill down on fields and values. Analyst users do not see the Field Browser at all.
- Export reports to Excel or CSV files but not configure export or export for data enrichment.
- Schedule reports to run in the background and run scheduled reports but not edit or save them.
- Add existing reports to the dashboard but not edit or save them.

Related Information

Reports [page 15]
Report Filtering and Navigation [page 20]
Report Search Filters [page 24]
Modification of Report Displays [page 31]
Report Scheduling [page 36]
Reports on Your Dashboard [page 39]
Exporting the Current Contents of the Report Pivot Table to an Excel File [page 42]

Exporting the Current Contents of the Report Pivot Table to a CSV File [page 45]

Reports

You run reports to analyze activity in your SAP Ariba solution.

The types of reports you run, and the data you use, depend on the following factors:

- **Your company's SAP Ariba solution package.** Depending on the features available in your SAP Ariba solution package, you might run reports on sourcing events, contracts, invoices, purchase orders, requisitions, suppliers, Supplier Performance Management projects, and so forth.
- **Your roles and responsibilities.** Depending on your roles and responsibilities at your company, you might run reports to monitor your own activity, the activity of other users in your approval flow, or to analyze company-wide activity. SAP Ariba Procurement solutions users with the Reporting Manager role run reports on all of the activity for users in their approval flow. SAP Ariba Spend Analysis business analysts run reports on the entire company's spend.

SAP Ariba prepackaged reports are available in the Prepackaged Reports folder. Reports that you have saved for your own use are available in your Personal Workspace folder, which is only visible to you. Reports that you and other users have made public are available in the Public Reports folder, which is visible to all users who can run reports. Reports in the Public Reports folder can be edited by any user who can save reports.

Prerequisites

You must have permission to work with specific solution functionality in order to see the prepackaged reports for that solution, or to see the public reports based on facts for that solution. For example, if your company's SAP Ariba solution includes both SAP Ariba Spend Analysis and SAP Ariba Contracts, but you only have permission to work with contracts, you do not see SAP Ariba Spend Analysis reports. See Key Concepts About Running SAP Ariba Reports [page 5].

Restrictions

Some users do not have permission to save reports. Some users who can save reports do not have permission to save them to the Public Reports folder.

Helpful Hints

You can mouse over any report in a folder to see a description of that report.

Running a Report [page 16]

Saving a Report [page 17]

Reference Information for Running Analytical Reports [page 17]

Running a Report

Use this procedure to run a report.

Procedure

1. Perform one of the following actions:
   - To run one of SAP Ariba's prepackaged reports, on the dashboard, click **Manage** > **Prepackaged Reports**. Prepackaged reports are organized into folders based on features.
   - To run a report you have saved, on on the dashboard, click **Manage** > **Personal Workspace**. Click the expand arrow by a folder to see the reports available in that folder.

     > **Note**
     >
     > - Analytical reports in folders can be exported to files, and reports from files can be imported into folders from your **Personal Workspace**. To enable the options **Export Reports in Folder to File** and **Import Reports from File to Folder**, set the **Enables the option to export reports in folders to files and import reports from files to folders** (`Application.Analysis.ReportDumpFromUIEnabled`) parameter to **Yes**. For more information, see Enables the option to export reports in folders to files and import reports from files to folders.
     > - By default, the **Remove HTML tags from rich text fields in analytical reports** (`Application.Analysis.RemoveHTMLTagsInTheAnalyticalReports`) parameter (set by SAP Ariba support) is enabled. As a result, HTML tags are removed from rich text fields in both the analytical reports displayed on the user interface and in the exported CSV or Excel files. To display HTML tags in rich text fields, contact SAP Ariba support to disable this parameter.

   - To run a report that someone else in your company has created and saved for public use, on the dashboard, click **Manage** > **Public Reports**. Click the expand arrow by a folder to see the prepackaged reports available in that folder. Public reports are organized by the users who save reports there.
2. Click on a report and select **Open**.
3. Click **View Report**.

Next Steps

- Filtering and Navigating Report Data [page 20]
- Filtering Report Data Using Search Filters [page 24]
- Modifying How Your Report Displays Data [page 31]

Saving a Report

Use this procedure to save a report to a folder.

Procedure

1. On the report's pivot table, click **Save**.
2. If prompted, select **Save** to save your edits to the report under its current name, or click **Save As** to save the edited report under a different name.
3. If you are saving the report under a new name, enter it in the **Report Name** field.
4. If you are saving changes to a report that is on your dashboard, select **Update dashboard to use this version**.
5. Select the folder where you want to save the report from the **Current Project** pull-down menu:
    - To save a report to your Personal Workspace, select **Personal Workspace**.
    - To save a report to the Public Reports folder, select **Public Reports**. You do not see this option unless you have permission to publish reports.
    - If you do not see your destination folder on the **Current Project** pull-down menu, select **Other**.
6. Navigate to the folder where you want to click the report, select it, and click **Save**.

Reference Information for Running Analytical Reports

Information about different field menus you can use to navigate through and manipulate data in SAP Ariba reports.

Pivot Table Quick Reference	
Data menus	You use data menus to modify the display of the data for the measures in the report. In prepackaged reports, data menus are simply labeled "Data". In custom reports, there is a data menu for each data field used to create the report. **Move Field**: display the field's data before or after the data of other fields on the pivot table **Edit in Wizard**: edit the hierarchies displayed in the report for the data field. **Show:** switch between detail and aggregate views for all of the data on the pivot table.

Pivot Table Quick Reference	
Page field menus	You use page field menus to manipulate the field's data on the pivot table. **Select Level, Values**: filter the report by specific hierarchy values, or apply a saved search filter. **Select Starting Level**: select the hierarchy level for which you want to see report data. **Show Field On**: display page field data on the pivot table as rows or columns, or move it back to the Page tab of the Field Browser, which removes it from the pivot table. **Show Fields:** toggle between an expanded and collapsed view of the page field menu on the Page tab of the Field Browser.
Column field menus	You use column field menus to manipulate the data in columns on the pivot table. **Drill Down By**: drill down into the column's hierarchy (the choice displayed in bold), or drill down into a different dimension using data from the column as a starting point. **Show/Hide**: hide the column to remove extraneous data from view, or show a previously hidden column. **Sort This Column**: sort column data in ascending or descending order.
Column heading menus	You use column heading menus to modify the display of data in columns. **Show Total/Variance**: display totals for the column field as totals or as variance, such as the difference between subtotals for two accounting years. **Field Settings**: set alerts on column fields, or modify display options such as Others bucketing, showing or hiding total columns, and showing or hiding subtotal rows.
Row field menus	You use row field menus to manipulate the data in rows on the pivot table. **Drill Down By**: drill down into the row's hierarchy, or drill down into a different dimension using the row as a starting point. **Show/Hide**: hide the row to remove extraneous data from view, or show a previously hidden row.
Data field menus	You use data field menus to examine specific data values on the pivot table. **Drill Down By**: drill down into the data value's hierarchy, or drill down into a different dimension using the data value as a starting point. **Show Detail View**: show the detail view for the data value to examine individual pieces of data.

Pivot Table Quick Reference	
Detail field menus	You use detail field menus to manipulate detail field data, which is displayed on column rows on the pivot table in detail view. **Expand Next Level**: expand the currently displayed detail field to the next level of the hierarchy. **Select Level, Values**: drill down into specific levels of the hierarchy. **Sort Row Fields:** Sort rows in the detail field column in ascending or descending order. **Move Field**: display the field's data to the left or right of the adjacent columns on the pivot table. **Show Field On**: display detail field data on the pivot table as plain columns, move it back to the Page tab of the Field Browser, which removes it from the pivot table, or remove it from the report entirely.
Field browser	You use the Field Browser to filter and drill down on page fields. Each page field in the Field Browser has its own page field menu. You can also examine and select levels and values in the page field hierarchy in the Field Browser by clicking the arrow on the left side of the page field menu. If the Field Browser is hidden, the report shows page fields across the top of the report.

Report Filtering and Navigation

Filter data to quickly locate the information you need.

You can filter data a number of different ways in SAP Ariba reports. This flexibility allows you to quickly locate the data you need. Filtering and navigating options include:

- **Filtering by date range** to show data for a specific fixed set of dates or a relative date range. With relative date ranges, the report automatically updates with new data in the most recent time periods whenever you open it.
- **Filtering by row or column fields** to constrain the report's data by hierarchy levels or specific values in row and column fields on the pivot table.
- **Filtering by page fields** to constrain the report's data by hierarchy levels or specific values in page fields on the Field Browser.
- **Filtering by detail fields** to constrain the report's data by specific values in detail fields on the pivot table.

Prerequisites

You must have permission to run reports in order to filter and navigate through report data. In SAP Ariba strategic sourcing solutions, members of the Analyst global user group cannot filter data on the report pivot table.

Filtering a Report by Date Range [page 20]

Filtering Report Data by Row or Column Fields on the Pivot Table [page 21]

Filtering Report Data by Page Fields in the Field Browser [page 22]

Filtering Report Data by Detail Fields on the Pivot Table [page 22]

Reference Information for Filtering Reports by Date Range [page 23]

Filtering a Report by Date Range

Use this procedure to filter the data for a report by a range of dates.

Procedure

1. Run the report. Most reports display the Refine Data page before opening. If you have permission to create reports, you can also access the page by clicking **Edit** on the report pivot table.
2. On the Refine Data page, specify a range of dates:
    - Select **Relative date range** to see data that is updated every time you run the report as the date range changes relative to the current date. Select the time periods you want to use (months, quarters, or years)

from the **Time Period** pull-down menu and select the number of most recent and future time periods to use in the filter. If you want the date range to end at the last full month, quarter, or year, deselect **Include current partial year/quarter/month**. Otherwise, the report includes data up to the current day.

- Select **Fixed date range** to filter by a specific date range and enter dates or use the calendar icon to define the range. If your fixed date range ends in the past, the data in the report does not change much. Selecting **Automatically adjust the range to include complete months** automatically extends your date range to the full start and end months and improves report performance.

3. To filter even more precisely by date, particularly if your report includes more than one date field, select **Advanced Options**. See Advanced Options for Date Range Filters [page 23] for details.
4. Click either **View Report** (if you are running the report) or **Done** (if you are editing it) to apply the date filter to the report.

Results

The report constrains the data set to the specified date range. The date range filter appears as a breadcrumb in the **Applied Filters** area of the pivot table.

Filtering Report Data by Row or Column Fields on the Pivot Table

Use this procedure to filter report data by row or column fields.

Procedure

1. On the report pivot table, click the menu for the row or column field you want to filter by and, under **Select Level, Values**, select a hierarchy level and value.

   The field menu only lists the first few values in the hierarchy. To search through the full list of values, select **Select Others** and create a search filter as described in Report Search Filters [page 24].
2. To return to a view of the data for the entire hierarchy, click the field menu and select **Select Level, Values: (All)**.

Results

The report constrains the data set to the specified row or column hierarchy field levels and values. The filter appears as a breadcrumb in the **Applied Filters** area of the pivot table.

Filtering Report Data by Page Fields in the Field Browser

Use this procedure to filter report data by page fields.

Procedure

1. In the Field Browser on the report pivot table, click the arrow to the left of the field name to expand the full list of values in the next level of the page field hierarchy.
2. Click the value you want to use to filter data.
3. To return to a view of the data for the entire page field hierarchy, click the right side of the page field menu in the Field Browser and select **Select Level, Values: (All)** from the pull-down menu.

Results

The report constrains the data set to the specified row or column hierarchy field levels and values. The filter appears as a breadcrumb in the **Applied Filters** area of the pivot table.

Filtering Report Data by Detail Fields on the Pivot Table

Use this procedure to filter report data by detail fields.

Procedure

1. On the report pivot table, click the column heading for the detail field you want to filter by and, under **Select Level, Values:**, select a value.

   The field menu only lists the first few values in the hierarchy. To search through the full list of values, select **Select Others** and create a search filter as described in Report Search Filters [page 24].
2. To return to a view of the data for the entire hierarchy, click the field menu and select **Select Level, Values: (All)**.

Results

The report constrains the data set to the specified row or column hierarchy field levels and values. The filter appears as a breadcrumb in the **Applied Filters** area of the pivot table.

Reference Information for Filtering Reports by Date Range

Information about advanced options for date range filters.

Advanced Options for Date Range Filters

The advanced options available to you depend on the underlying fact or facts in the report you are working with.

Use This Option...	To...
Refine data using	Select a date hierarchy from the **Refine data using** pull-down menu. The options on this menu include: • Other date fields in the underlying fact which might or might not be in the current report. Selecting a date field adds it to the report if it is not already present. • **Two date fields spanning the above range**. This option filters the report using two date fields. The report includes all data across the range from the first date in Date Field 1 to the last date in Date Field 2. In some cases, this option can add a lot of data to a report. For example, if you are filtering an invoice report using Ordered Date as the start date and Invoiced Date as the end date, the report includes all of the invoices in the gap between ordering and invoicing. • **Two date fields within the above range.** This option filters the report using two date fields. The report includes all data within the range from the first date in Date Field 1 to the last date in Date Field 2. In some cases, this option can limit the data in a report. For example, if you are filtering an invoice report using Ordered Date as the start date and Invoiced Date as the end date, the report does not include any invoices with ordered dates before the last specified invoice date, even if the ordered date fits in the date range.
Date type	Select **Calendar** or **Fiscal** date type.
Include data with dates not set (unclassified)	Select this option to include all data in the report, including data with no associated dates. By default, reports only show data with associated dates.
Refine Selection Further	Select this option to filter the date field by specific values. This option is only available for some date hierarchies. The options on this menu include: • **Others**. This option allows you to create a search filter. For some date fields, you can specify values at specific levels of the hierarchy, such as Month, Quarter, or Year. • **Saved Search Filter.** This option allows you to apply a saved search filter created by you or another user to the report.

Report Search Filters

To filter data by complex combinations of values, create search filters.

To filter reports by specific hierarchy field values, you can perform searches for those values and create search filters that either include or exclude them from the report. Search filters can include complex combinations of values.

When you use a search filter on a report, the filter only applies to data in the report's current view. For example, if you have drilled down to a supplier and apply a search filter for commodity values, the report only displays data for that specific set of commodities for that supplier. It does not return results for other suppliers for that set of commodities.

You construct searches using characters (such as `manufacturer`), combined in some cases with operators (such as **contains** or **equals**) and wildcards. Some fields do not support searching using operators or wildcards. For details on valid characters, operators, and wildcards, as well as other search options, see Reference Information for Report Search Filters [page 28].

Some hierarchy fields allow you to search on multiple fields in the dimension at the same time. For example, you can search for suppliers by supplier name and ID to perform a more targeted search.

Once you have created a search filter, you can either use it once or save it to use again and share with other users. Saved search filters are associated with the hierarchy field rather than the report, so they are available in any report that uses that field as a page, row, or column field. You can only edit or delete the search filters you have saved.

Saved filters are copied into individual reports, not dynamically referenced. This prevents reports from picking up inadvertent changes (for example, if you delete the filter, the report can still run). As a result, when you modify a saved search filter, if you want the modifications to apply to existing reports that previously used that filter, you must re-save each desired report with the modified filter.

Prerequisites

You must have permission to run reports in order to use search filters. In SAP Ariba strategic sourcing solutions, members of the Analyst global user group cannot use search filters.

Restrictions

Search filters have the following restrictions:

- Search filters display results for the first 5,000 returned values.
- You can only apply one saved search filter to a report at a time.
- When you filter dates on a report, if there are calendar widgets or a dropdown containing filter operators such as **equals** or **is between**. you can't filter to find unclassified dates. As a workaround, to find unclassified dates, choose the **Month** or **Quarter** dimension, which do not have these controls, and type "unclassified" in the **Search Criteria** box.

Creating a Report Search Filter

Use this procedure to create a report search filter.

Procedure

1. On the report pivot table or in the Field Browser, click a field menu and select **Select Level, Values** > **Select Others** >.
2. If the hierarchy field in which you are searching allows search operators, select an operator.
3. Perform one of the following actions:
   - Enter search characters in the search text field.
   - Click **+**, paste or enter new line-separated values in the expanded search field, and click **OK**. When you click **OK**, the values you entered are converted into comma-separated values in the search field.
4. **Optional:** Click **Search Options** and select or deselect **Search Across Levels** to use the same search criteria across all hierarchy levels or narrow your search to specific levels. If you are searching specific levels, select operators and enter characters for those levels. See "Reference Information for Report Search Filters" [page 28] for more information.
5. **Optional:** Click **Search Options**, select an additional field from the pull-down menu, and enter search criteria for that field.
6. Click **Search**.
7. Select the values you want to use in the filter from the list of search results on the **Search** tab.
8. Click **Include** to filter the report by the selected values, or **Exclude** to filter the report by all values except the selected values. Your search filter can include some values and exclude others at the same time.

   When you select values to include or exclude, they appear on the **Included Items** and **Excluded Items** tabs. Click those tabs to remove values from the search filter. You can also click **Reset** on the **Search** tab to clear the results of your current search.
9. Continue entering search terms and adding included or excluded values to the search filter until it contains all of the values you want to use.
10. Click **OK** to apply the search filter to the report without saving it. To save it, see Saving a Report Search Filter [page 26].

Results

The search filter is applied to your current report. The field menu for the hierarchy field and the breadcrumbs in the **Applied Filters** area of the pivot table show the filter.

Saving a Report Search Filter

Use this procedure to save a report search filter.

Procedure

1. Create a report search filter. See Creating a Report Search Filter [page 25].
2. Click **Save**.
3. Select **Save As**.
4. Enter a descriptive name of up to 255 characters for the search filter. Ariba recommends that you keep the name relatively short so that it displays well on the **Search Options** menu.
5. **Optional:** Enter a description for the search filter.
6. To allow other users to use the saved search filter in reports that include the same hierarchy field, select **Make search filter public**.
7. Click **Save**.
8. Click **OK** to apply the search filter to the current report.

Results

The saved search appears on a list of available search filters you can select on the field menu for the hierarchy field in any report. If you have made the search filter public, other users can also select it from that menu.

Applying a Saved Search Filter to a Report

Use this procedure to apply a saved search filter to a report.

Procedure

1. On the report pivot table, click the row, column, or page field you want to filter and select **Select Level, Values** > **Select Search Filter**.
2. Select the search filter you want to use from the list of available filters and click **Select**.

Results

The search filter is applied to your current report. The field menu for the hierarchy field and the breadcrumbs in the **Applied Filters** area of the pivot table show the filter.

Editing a Saved Search Filter

Use this procedure to edit a saved search filter.

Procedure

1. On the report pivot table or in the Field Browser, click the hierarchy field menu associated with the saved search and select **Select Level, Values** > **Select Others**.
2. On the **Search** tab, click **Search Options** and select the saved search filter you want to edit from the pull-down menu.
3. Modify the search by adding values to or removing them from the **Included Items** and **Excluded Items** tabs as described in Creating a Report Search Filter [page 25].
4. Select **Save** to save the edits to the current search filter, or select **Save As** to save the edited search filter under a new name.
5. **Optional:** Modify the search filter's description.
6. Click **Save**.
7. Click **OK** to apply the edited search filter to the current report.

Deleting a Saved Search Filter

Use this procedure to delete a saved search filter.

Procedure

1. On the dashboard, click **Manage** > **Report Search Filters**.
2. Click the saved search filter you want to delete and select **Delete**.
3. Click **Done**.

Reference Information for Report Search Filters

Information about search characters, operators, and wildcards that can be used in report search filters.

Search Characters

You can search for any valid text characters, such as letters or numbers, in any combination. When you enter characters in the search field, keep in mind the following:

- Searches are not case sensitive, so if you enter the letter **a** in the search field, the search will return values that include both “a” and “A”.
- If your search term includes a character that is also used as a search wildcard, you can escape it by entering a backslashes (“\”) in front of it. For example, to search for a supplier named “My_Supplier,” enter **My_Supplier** in the search field.
- You can enter multiple combinations of characters separated by commas (“,”) in the search text field. For example, if you search for a supplier using the **contains** operator and enter **Inc, Inc.** in the search field, the search will return values that include both “Inc” and “Inc.”
  Since this field recognizes commas as separators, if your search characters include commas, you must escape them by entering a backslash (“\”) in front of them as you would for a wildcard. For example, to search for a supplier named “Supplier, Inc.”, enter **Supplier\, Inc**.
- You can enter multiple combinations of characters on new lines in the multiple value search field, which you open by clicking the **+** to the right of the search field. For example, if you search for a supplier using the contains operator and enter the following in the multiple value search field:
  Inc
  Inc.
  The search returns values that include both “Inc” and “Inc.”

Search Operators

The operators that are available in your search depend on the data type (string text, number, and so forth) of the data in the hierarchy field you are searching. Values for IDs such as supplier IDs and for codes such as UNSPSC or commodity codes are text strings, not numbers. You can use the following operators to perform searches:

Use This Operator...	To Search For...
begins with	Any string text values that begin with the characters you specify. String text values are values like supplier or commodity names. For example, you can use the **begins with** operator to search for all suppliers that begin with the letter "A" or the word "Acme."
is between	Any number or date values between sets of characters you specify. For example, you can use the **is between** operator to search for all years between 2010 and 2012, or for all dates between 1/1/2010 and 12/31/2012.
contains	Any string text values that contain the characters you specify. String text values are values like supplier or commodity names. For example, you can use the **contains** operator to search for all suppliers with names that contain the text "micro."
either	Any Boolean value that is set to Yes for either of the sets of characters you specify. Boolean values are yes/no values, and the either operator is the equivalent of logical OR (||). For example, you can use the **either** operator to search for all suppliers that are either Minority Owned or Woman Owned.
is greater than	Any number values that are greater than the number you specify. Number values are values like years. For example, you can use the **greater than** operator to search for all years greater than 2005.
ends with	Any string text values that end with the characters you specify. String text values are values like supplier or commodity names. For example, you can use the **ends with** operator to search for all suppliers with names that end with the letter "b" or the word "Inc."
equals	Any string text, number, or date value that exactly equals the characters you specify. String text values are values like supplier or commodity names, while number values are values like years. For example, you can use the **equals** operator to search for exact matches to "Acme Company, Inc," the year "2011," or the date "5/17/2011."
is less than	Any number values that are less than the number you specify. Number values are values like years. For example, you can use the **less than** operator to search for all years less than 2012.
no	Any Boolean value that is set to No for the characters you specify. Boolean values are yes/no values. For example, you can use the **no** operator to search for all suppliers that are not Minority Owned.
yes	Any Boolean value that is set to Yes for the characters you specify. Boolean values are yes/no values. For example, you can use the **yes** operator to search for all suppliers that are Minority Owned.

Wildcards

You can use the following wildcard characters to perform searches for string text values using the contains operator:

Use This Wildcard...	To Match...
% (percentage sign)	The characters you enter to a hierarchy field value of any length. For example, if you search a commodity hierarchy using the **contains** operator and enter **%building%construction%** in the search field, the search returns all commodities that include the words "building" and "construction" in that order, such as "Building and construction maintenance services" and "Building construction management."
_ (underscore)	The characters you enter to a hierarchy field value to within a single character. For example, if you search the Supplier ID field of a supplier hierarchy using the **contains** operator and enter **487645_** in the search field, the search returns all supplier IDs that start with 487645 and end with a single other character, including 4876451, 4876452, and so forth.

Search Options

The **Search Options** menu on the **Search** tab includes the following options:

Use This Option	To...
Add Search Field	Include additional fields in your search. This option is only available for some hierarchy fields, and allows you to narrow your search by using criteria such as IDs in addition to names.
Search Across Levels	For the following hierarchy fields, searches include only the current level of the hierarchy by default: • UNSPSC • Ariba Classification Taxonomy • Commodity • Region • Department or Cost Center • User (Management) • Parent Agreement • Purchasing Unit For all other hierarchy fields, searches include all levels by default; for example, a search in Commodity for **apparel** returns results in all four levels of the Commodity hierarchy. Use the **Search Across Levels** option to change the default behavior of the search. All SAP Ariba prepackaged reports use the default setting. However, any reports saved or created by users in your organization can be parameterized to use non-default settings. For more information on parameterized reports, see Initial Filters on Reports.

Modification of Report Displays

Modify displays in reports to make data most accessible.

SAP Ariba reports have a number of settings that allow you to control how you display data. You can:

- Use **Aggregate and Detail Views** to switch between displaying the data in your report using column, row, and page fields with rolled-up (aggregate) subtotals and totals, or using detail fields to show line-level data. Aggregate View shows overall trends in data and allows you to drill down into different levels of the hierarchies to examine trends in specific areas. In Aggregate View, the individual pieces of data that make up a report, such as individual invoice split lines, are aggregated together into hierarchies to show meaningful trends. Individual dates in Detail View are grouped into Month, Quarter, and Year levels in a date hierarchy; individual parts are grouped into levels in a commodity hierarchy; and so forth. Detail View allows you to see individual transactions, such as all of the invoices for a specific supplier. An SAP Ariba report might use Detail View or Aggregate View as the default view, depending on the purpose of the report and the kind of data it displays.
- Display report data visually in a **chart**.
- **Set alerts** to highlight data that meets specific criteria with red, yellow, and green color codes. You can set alerts on any measure or column heading that contains totals. Alerts are triggered by changes to the data on the report pivot table, including running the report, filtering it, and navigating to previous report views using breadcrumbs.
- Display report data in a **pivot outline** or a **pivot grid layout**. The pivot grid layout displays report data with grid lines to provide a clearer connection between individual rows and their subtotals and totals by displaying each hierarchy and level as a separate column and dividing different sections of the table with lines in a more spreadsheet-like layout. It is useful for detail-level reports that have numerous row fields or that display multiple hierarchy levels on rows or columns. The pivot outline displays nested rows without dividing lines and is useful for showing the hierarchical relationships between different rows of the report and looking at high-level or aggregate values. Reports in Detail View only use the pivot grid layout, while reports in Aggregate View use the pivot outline layout by default but can also display data in a pivot grid.
- By default, the **Remove HTML tags from rich text fields in analytical reports** (`Application.Analysis.RemoveHTMLTagsInTheAnalyticalReports`) parameter (set by SAP Ariba support) is enabled. As a result, HTML tags are removed from rich text fields in both the analytical reports displayed on the user interface and in the exported CSV or Excel files. To display HTML tags in rich text fields, contact SAP Ariba support to disable this parameter.

Prerequisites

You must have permission to run reports in order to modify how those reports display data. In SAP Ariba strategic sourcing solutions, members of the Analyst global user group can modify how reports display but cannot save those changes.

Restrictions

Report charts cannot display data for more than two measures. There are additional limitations on the number of fields they can display, depending on the chart type. See Reference Information for Displaying Reports as Charts [page 34] for details.

Switching Between Aggregate and Detail View in Reports

Use this procedure to switch between displaying the data in your report in aggregate or detail view.

Procedure

1. Open the report you want to examine.
2. Switch from one view to the other:
   - For a report in Aggregate View, click the **Data** menu and select **Show** **Detail View**.
   - For a report in Detail View, click **Detail View** and select **Show** **Aggregate View**.

Displaying a Report as a Chart

Use this procedure to display a report as a chart.

Procedure

1. On the report pivot table, click the **Chart** tab.
2. Select the chart type from the **Type** pull-down menu. See Chart Types [page 34] for details.
3. **Optional:** Specify the number of items listed in the legend under the chart in the **Legend Length** field and click **Refresh**.

4. **Optional:** Click **More Chart Options** and select additional options for chart display. See Chart Options [page 35] for details.
5. **Optional:** Click **Add to Dashboard** to add the chart to the **Home** tab of your SAP Ariba solution dashboard. You can move it to a different tab from there.

Setting Alerts in Reports

Use this procedure to enable alerts in reports.

Procedure

1. On the report pivot table, click the **Data** menu (for reports with one measure field) or a measure column heading menu (for reports with more than one measure field) and select **Field Settings**.
2. On the Define Data Field page, click the **Alerts** tab.
3. Select **Enable Alerts**.
4. Specify the alert condition by selecting an operator (**<**, **<=**, **>**, **>=** from the **For values** pull-down menu.
5. Define the alert:
   - To define an alert based on a numerical value, enter the numerical value that triggers the alert.
   - To define an alert based on another measure field in the underlying reporting fact, select **Numerical Value** > **Define Alert Using** > **Measure**, then choose the measure field from the pull-down menu.
6. Select the color of the alert highlight from the **Color** pull-down menu.
7. **Optional:** Enter a notification message to associate with the alert. Notification messages display when you hover your mouse over the solid area of the alert surrounding a field on the pivot table.
8. Specify additional conditions by clicking **Add new condition** and repeating the previous steps. To delete an already set condition, click the **X** to its left.
9. Select pivot table options for highlighting grand total rows, all rows besides grand totals, or detail fields.
10. Click **OK** to save the alert and return to the report pivot table.

Results

The report now displays the alerts you defined to visually highlight data.

Switching Between Grid and Outline Pivot Layouts in Reports

Use this procedure to choose pivot outline or pivot grid layout for a report.

Procedure

1. Open the report you want to examine.
2. Switch from one layout to the other:
   - In the pivot outline layout, in the **Display Options** area of the report pivot table, select **Pivot Outline** > **Pivot Grid**.
   - In the pivot grid layout, in the **Display Options** area of the report pivot table, select **Pivot Grid** > **Pivot Outline**.

Reference Information for Displaying Reports as Charts

Information about different chart types and chart options for displaying reports.

Chart Types

Type	Description
Pie	Displays data as proportional sections of a circle; can only display data for one measure.
Donut	Displays data as proportional sections of a hollow circle; can only display data for one measure.
Bar	Displays data as proportional horizontal bars; can display data for two measures.
Column	Displays data as proportional vertical columns; can display data for two measures.
Line	Displays data as a line; can display data for two measures.
Area	Displays data as proportional areas below a line; can display data for two measures.
Combination	Displays data for two measures using two different overlaid chart types on the same chart.

Chart Options

Type	Options
Visual	• 2D • 3D **Visual** options are only available for **Pie**, **Donut**, **Column**, and **Combination** charts.
Data Label	• **Percentage** labels chart data as percentages of the report total. It is only available for **Pie** and **Donut** charts. • **Data** labels chart data with report values. • **None** shows no labels for data on the chart. **Data Label** options are available for all chart types.
Data Grouping	• **Stacked** groupings show one bar or column per row field, with data in those bars or columns "stacked" into color-coded sections for each column field. • **Regular** groupings show separate, clustered sets of bars or columns for each row and column field combination, and is the default setting. Data grouping options are only available **Bar** and **Column** charts.
Data Level	• **Top** charts the report's row data from left to right and the column data from top to bottom. • **Bottom** charts the report's row data from right to left and the column data from bottom to top. **Data Level** options are available for all chart types.

Report Scheduling

You schedule a background report to run at an approximate set time whether or not you are not logged into your SAP Ariba solution.

You can schedule it to run in the background once or at regular intervals. You can schedule any report to run in the background, including prepackaged reports and reports that you and other users in your company have created and saved. You schedule a report to run in the background for one of the following reasons:

- **Hands-off reporting:** Once you schedule a background report, you do not have to be logged into your SAP Ariba solution when it runs. If you are running a large report that contains a lot of data, you can schedule the report to run in the background as soon as possible and perform other tasks while it runs. You can also schedule a report to run in the background at regular intervals so that it is ready when you need it.
- **Taking data snapshots:** When you run a report in real time, it displays current data. Scheduled background reports capture a view of your data at the moment they're run and can be stored for some time, so you can use them to compare periodic snapshots of your data.
- **Sending reports to recipients:** You can share the same scheduled report with other stakeholders and project members through email. The recipients you specify can be other SAP Ariba solution users or external email addresses. You and other recipients can then use the same data snapshot for collaborative projects or tracking purposes.

When a scheduled report has finished running, you receive an email notification and can set it up to include the report attached as a Microsoft Excel XLS file inside a ZIP file. You can view report results in that attachment or by logging into your SAP Ariba solution and opening or downloading the stored report results. SAP Ariba supports downloading stored report results in Microsoft Excel 2003, 2007, and 2010 format.

> ⓘ Note
>
> When the **Specify a sender name in background report notification emails** (`Application.Analysis.CustomizeEmailNotificationDisplayName`) parameter is enabled, the **From** field in background report notification emails displays the chosen sender name along with the default email address. By default, the parameter is blank, and the **From** field displays only the default email address. For more information, see Specify a sender name in background report notification emails.

Prerequisites

If you have permission to save reports, you can run any report in the background and modify or filter saved results. In SAP Ariba strategic sourcing solutions, members of the Analyst global user group can schedule prepackaged and public reports to run in the background but cannot modify or filter saved results.

Restrictions

Scheduled background reports have the following restrictions:

- Because scheduled reports take a snapshot of the report data at the time they are run, they are not as flexible as live reports, which have a continuous connection to the database. When you view stored report results in your SAP Ariba solution, you can filter and drill down on existing page, row, and column fields, but you cannot move fields from page to column to row or add new fields to the results.
- Stored background report results are limited to 128,000 rows; results with more than 128,000 rows are truncated.
- Scheduled report Excel attachment files are limited to 64,000 rows; results with more than 64,000 rows are truncated.
- There is a limit to the number of scheduled background reports that can run at the same time in your site. Each newly scheduled report is added to a queue. Scheduled times are approximate; depending on the number of reports all of the users in your site have scheduled to run at a given time, a background report might run at the scheduled time or some amount of time after the scheduled time. Be sure to allow enough time for the report to run if the system is crowded. If you experience large delays in scheduled report runs, contact the person in your company who managed all of your company's scheduled reports.

Helpful Hints

Since your ability to manipulate data in scheduled reports is limited, you should make sure that you are working with a version of the report that displays the data you want to see in the results before creating the schedule.

Running a Report in the Background or Editing a Background Report Schedule [page 37]

Viewing, Downloading, or Deleting Stored Scheduled Report Results [page 38]

Running a Report in the Background or Editing a Background Report Schedule

Use this procedure to schedule a report to run in the background.

Procedure

1. Navigate to the folder that holds report you want to schedule.
2. Click the report and select **Run In Background**.
3. **Optional:** On the **Refine Data** page, filter the data you want to see in the report using date ranges and hierarchy fields. For more information, see Filtering a Report by Date Range [page 20].
4. Click **Background**.

5. If prompted, save any changes to the report.
6. Select the schedule for the report.

   To deactivate a current report schedule, select **None**.
7. Select the number of days to keep stored results (for a report you want to run once) or the number of runs to keep (for a recurring report schedule).
8. To attach report results as a Microsoft Excel file to the notification email, select **Attach report to notification email**.
9. To send notification emails with the report attachment to other users in your SAP Ariba solution, click **select**, select the users, and click **Done**.
10. To send notification emails with the report attachment to email addresses, enter one or more comma-separated email addresses in the **Recipient email address** field.
11. Click **Save** to save your schedule settings.

Viewing, Downloading, or Deleting Stored Scheduled Report Results

Use this procedure to manage stored scheduled report results.

Procedure

1. Click the report whose stored results you want to view, download, or delete and select **View Stored Results**.
2. To open or download results, click the stored results and select **Open** or **Download**.
3. To delete results, select them and click **Delete**.

Results

> ⓘ Note
>
> If you view stored scheduled report results in your SAP Ariba solution and make changes to the pivot table, such as filtering or drilling down, you are prompted to save those changes when you exit the stored results. Saving the changes saves them in the original report, and any future scheduled runs of that report will include those changes. To save your changes to the report results without changing the original report, save them using a different report name. To exit the report results without saving your changes, click **Cancel**.

Reports on Your Dashboard

You can add reports to any tab of your SAP Ariba solution dashboard as charts, tables, or summarized views so that you can monitor the status of business processes and quickly notice changes to data.

The reports you can add to your dashboard include prepackaged reports, reports shared in the Public Reports folder, and reports in your Personal Workspace.

The types of content you can add to different dashboard tabs are defined by the dashboard templates your company uses.

Prerequisites

You must have permission to run a report in order to add it to your dashboard.

Restrictions

Table reports on the dashboard only display the first row field. You must open the report to see any additional row fields. Chart reports on the dashboard have the same display restrictions as all chart reports. See Modification of Report Displays [page 31].

Helpful Hints

To remove a report from your dashboard, click the **X** in its title bar.

Adding the Current Report to Your Dashboard [page 40]

Adding a Saved Report to the Dashboard [page 40]

Adding the Current Report to Your Dashboard

Use this procedure to add the current report to your dashboard.

Procedure

1. On the report pivot table, click the **Dashboard** tab.
2. Click the **Add to Dashboard** button in either the **Current Chart** or **Pivot Table** area to add the report to your dashboard as a chart or table.

Results

The report displays on the **Home** tab of your SAP Ariba solution dashboard by default. You can drag and drop it to other locations on the **Home** tab or to other tabs.

Adding a Saved Report to the Dashboard

Use this procedure to add a saved report to your dashboard.

Procedure

1. On your SAP Ariba solution dashboard, click the tab to which you want to add the report.
2. Click the dashboard configuration icon and select **Add Content**.
3. On the Add Content menu, perform one of the following actions:
    - To add a report to your dashboard as a chart or table, drag and drop **Chart/Table** to your dashboard tab, then navigate to the report, click it, and select **Table** to add it as a table or the chart type to add it as a chart.
    - To add a report to your dashboard as a summarized view, drag and drop **Summarized View** to your dashboard tab, navigate to the report you want to summarize, and create the view you want to display. See Summarized Views of Reports [page 48] for more information.
4. On the **Add Content** menu, click **Done**.

Results

The report displays on the current tab of your SAP Ariba solution dashboard. You can drag and drop it to move it to the desired position.

Export of Reports to Excel or CSV Files

You can export report data to Excel or Comma Separated Values (CSV) files. You can also configure report export settings to select fields to export.

> **Note**
>
> By default, the **Remove HTML tags from rich text fields in analytical reports** (`Application.Analysis.RemoveHTMLTagsInTheAnalyticalReports`) parameter (set by SAP Ariba support) is enabled. As a result, HTML tags are removed from rich text fields in both the analytical reports displayed on the user interface and in the exported CSV or Excel files. To display HTML tags in rich text fields, contact SAP Ariba support to disable this parameter.

Exporting the Current Contents of the Report Pivot Table to an Excel File

Use this procedure to export report data to Excel and use Excel's formula and chart features to analyze and present your data.

Prerequisites

You must have permission to run a report in order to export it. You must have Microsoft Excel 2007, 2010, 2013, 2016, 2018, or 2019 installed on your computer in order to export a report to Excel.

In SAP Ariba strategic sourcing solutions, users in the Analyst global user group can export reports to Excel files but cannot configure exports.

Context

You can export the current contents of a report pivot table to files with the following formats: Microsoft Excel XLS, XLSX, or XLSM, using a template that determines how the data is displayed in Excel. You can choose which template you want to use or create your own template. Use the Excel option if you want to take advantage of Excel's formula and chart features for further investigation and presentation of your data.

To view the data in other applications, you can export the contents of a report pivot table to a CSV file [page 45].

By default, SAP Ariba reports export to Microsoft Excel using a prepackaged, standard template. If you export a report to Excel, the exported data is put into a Microsoft Excel workbook divided into different worksheet tabs. The tabs you see will vary depending on which template you used when you exported the data, but they typically include:

- A **Data** worksheet that contains the raw data exported from the report.
- A **Chart-Table** worksheet that stores the data used to generate charts.
- **Chart** tabs that show graphical representations of the data. In Excel 2007 and above, you filter on chart fields by clicking the **Pivot Chart Tools** ribbon and selecting **Analyze** > **Pivot Chart Filter**, then selecting the active fields on the chart.
- A **Pivot** worksheet that shows data in an Excel pivot table.

You can configure the export to specify the exported file format, choose a specific template for Excel export, and specify the exact data (measures, hierarchies, and fields and levels in those hierarchies) that you want to export. For example, if you export the Region hierarchy, you can use either the Region or Region ID field. If your data includes an Invoice Date hierarchy, you can select whether to export Year, Quarter, Month, or Date.

⚠ Restriction

- SAP Ariba reports can export 1,000,000 rows to Excel 2007 and above. Excel silently loses any rows exceeding this limit. To control the maximum number of rows exported from an analysis report into Excel, use the **Maximum number of rows a report can have for Excel export** (`Application.Analysis.ExcelExportThreshold`) parameter to set the **Value**. By default, the limit is **500000**. If the number of rows in the report exceeds the parameter value, the report is exported to a CSV file instead of an Excel file. For more information, see Maximum number of rows a report can have for Excel export.
- SAP Ariba reports impose a limit of 250 characters per cell on data exported to Excel. Cells longer than 250 characters cause export to fail.
- SAP Ariba reports impose a limit on the number of row and column fields exported. By default, the limit is 5 row fields and 5 column fields. Any fields on the pivot table above the limit are not exported. SAP Ariba Customer Support can configure export limits.
- You cannot export user-created custom formula fields to Excel because computed fields because they cannot be properly recalculated. If your analytical report includes custom formula fields, the report exports the data into Excel without them. To recreate custom formula fields, export the fields on which you have based the custom formula field and then recreate the formulas in Excel.
- If the region setting in Excel does not match the locale setting for your browser, Excel treats numbers as strings. To avoid this problem, use a localized version of Excel that matches your browser locale setting or change your regional settings in the Microsoft Windows Control Panel to the appropriate locale.
- If your report has currency fields with specific formatting, such as no decimal places, that formatting is not exported to Excel. Currency in the exported report displays in default Excel currency settings.

Procedure

1. Run the report you want to export.
2. On the report pivot table, complete one of the following actions: .

- To export to Excel using the default template, select **Export**.
- To export to Excel using a custom template:
  - Select **Actions** > **Configure Export** .
  - Choose the template you want to use.
  - Select **Export Data**.
  - Select the data to include in the export: Select **Current pivot table contents** to export all of the data in the pivot table. Select **Custom** to select specific fields to export; see Selecting Report Fields to Export to Excel or CSV Files During Export Configuration [page 46] for details. This option is not available if the template you previously selected uses fixed columns. Exported data is defined by fixed columns and cannot be altered during export.

You can also export the report without opening it first by navigating to the folder where the report is stored, clicking the report, and selecting **Export**.

3. Wait for the download to complete and save the Excel file.
4. Open or save and open the downloaded Excel file.
5. Initially only the **Data** worksheet contains information. To populate the chart worksheets (the **BarChart**, **Pivot**, **PieChart**, and **Chart-Table** worksheets):
   a. Select a chart worksheet.
   b. Navigate to the **Data** menu in the Excel ribbon and select **Refresh All**.

      You might see an error similar to the following. If so, ignore it and select OK.

      ```
      Unable to open https://anlibm1:4433/Analysis/Main/ad/Table/ExcelDirectAction/
      nnnnnn. Cannot locate the internet server or proxy server.
      ```
6. Use the Excel PivotChart or PivotTable task pane to show and arrange data in a chart or table.

Results

The exported report opens in the format configured in your export settings. You can save the report to the location of your choice for future use.

Related Information

Supported Microsoft Office Applications

Exporting the Current Contents of the Report Pivot Table to a CSV File

Use this procedure to export report data to a CSV file for use by another application.

Prerequisites

You must have permission to run a report in order to export it. You must have Microsoft Excel 2007, 2010, 2013, 2016, 2018, or 2019 installed on your computer in order to export a report to Excel.

In SAP Ariba strategic sourcing solutions, users in the Analyst global user group can export reports to Excel files but cannot configure exports.

Context

You can export the current contents of a report pivot table to files in a Comma Separated Value (CSV) format, which can be opened by any spreadsheet application. Use the CSV option if you want to read the file with an application other than Excel. You can alsoexport the contents of a report pivot table to Excel [page 42].

Procedure

1. Run the report you want to export.
2. On the report pivot table, select **Actions** > **Configure Export** .

   You can also export the report without opening it first by navigating to the folder where the report is stored, clicking the report, and selecting **Export**.
3. Select **Comma-separated value(CSV)format**.
4. Select the data to include in the export: Select **Current pivot table contents** to export all of the data in the pivot table. Select **Custom** to select specific fields to export; see Selecting Report Fields to Export to Excel or CSV Files During Export Configuration [page 46] for details.
5. Select **Export Data**.

Results

The exported report opens in the format configured in your export settings. You can save the report to the location of your choice for future use.

Related Information

Supported Microsoft Office Applications

Selecting Report Fields to Export to Excel or CSV Files During Export Configuration

>Use this procedure to select which report fields to export.

Procedure

1. Configure report export settings. See Exporting the Current Contents of the Report Pivot Table to an Excel File [page 42] or Exporting the Current Contents of the Report Pivot Table to a CSV File [page 45].
2. In the **Data Set** area of the Export Data page, select **Custom**.
3. **Optional:** Select the measure fields you want to include in the export. The measures on the current pivot table are automatically selected.
4. Select the level of data you want to export:
   - Select **Export aggregate data** to include only aggregate fields where data is rolled up in the export.
   - Select **Export detail data** to include data at the line level in detail fields in the export and select the detail fields to add.
5. **Optional:** Select which hierarchies in the report to export and the level to include. Row and column field hierarchies are exported by default; you can also export page field hierarchies.
6. **Optional:** For exported hierarchies, select additional fields to include in the export.
7. Click **Export Data** to export the report with the selected fields.

Results

The exported report opens in the file format configured in your export settings. It contains the fields you specified for export. You can save the file to the location of your choice for future use.

Reference Information for Exporting Reports to Excel

Information about templates you can use to export reports to Excel.

Default Excel Export Templates

This table lists the default Microsoft Excel templates that are available for exporting reports. Default SAP Ariba export templates are stored in the **Prepackaged Reports** > **General Templates** folder.

Use This Template...	To Export This File...
`Pivot_Area_Pie.xls`	An XLS (Microsoft Excel 2003 or earlier) format file that displays data in pie and area charts.
`Pivot_Area_PieExcel2007.xlsx`	An XLSX (Microsoft Excel 2007 or later) format file that displays data in pie and area charts.
`Pivot_Bar_Pie.xls`	An XLS (Microsoft Excel 2003 or earlier) format file that displays data in pie and bar charts.
`Pivot_Bar_PieExcel2007.xlsx`	An XLSX (Microsoft Excel 2007 or later) format file that displays data in pie and bar charts.

Summarized Views of Reports

A summarized view is an extraction of single values or totals of values from previously created analytical reports.

The layout of a summarized view is a two-column table. You can combine values from any existing analytical reports into a single summarized view and either place it on your SAP Ariba solution dashboard or add it to a compound report.

For example, to summarize information about commodities, you might want to design a view that shows the following values:

- Amount spent on the commodity
- Total number of POs
- Total number of invoices
- Total number of departments buying the commodity

Prerequisites

Any SAP Ariba solution user can add a summarized view of any report that they have permission to run to the dashboard. You must have permission to create reports to add a summarized view to a compound report.

Restritions

Summarized views show counts and totals. To see row or column data in a report on your dashboard, add the report as a table instead.

Helpful Hints

Clicking a linked total in a summarized view runs the underlying report.

Creating a Summarized View of a Report [page 49]

Creating a Summarized View of a Report

Use this procedure to create a summarized view of a report to add it to your solution dashboard or to a compound report.

Procedure

1. Perform one of the following actions:
   - To add a summarized view to a dashboard tab, click the dashboard configuration icon, then click **Add Content** > **Summarized View**.
   - On the **Configure Content** page of the compound report wizard, select **Add Content** > **Summarized View**.
2. Enter a title for the summarized view.
3. Navigate the folders to locate the analytical reports that contain the fields you want to include in your summarized view and click the reports.
4. In the **Data Fields** area, click a data field to add it to the summarized view. For hierarchy fields, you can select the level to add the view.
5. Use the arrow buttons to edit the order of the fields in the view.
6. Click **OK**.

Site Configuration Options for Running Analytical Reports

Some of the functionality for running analytical reports is controlled by the following configuration option, which SAP Ariba sets for you.

Application.Analysis.ASMDataAccessControlEnabled

This parameter specifies whether or not reporting data access control for SAP Ariba Sourcing, SAP Ariba Contracts, Ariba Supplier Information Management, and SAP Ariba Supplier Information and Performance Management project data is enabled in a site. The default setting is **No**.

If this parameter is set to **No**, all users can see all project data regardless of project membership. If this parameter is set to **Yes**, only users in the Full Reporting Access Authorized group can see all project data in reports. All other users can only see data for projects to which they have access through project team membership.

Application.Analysis.UseSchedulerTimeZoneForBackgroundReport

This Boolean parameter specifies whether to use the time zone of the user who scheduled a background report for the date format used in that report. The default value is **False**.

If this parameter is set to **False**, the server time zone is used for the date format of a scheduled background report. If this parameter is set to **True**, the time zone of the user who scheduled the background report will be used for the date format of a scheduled background report.

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