



ARIBA CONTRACTS

Creating Analytical Reports

Ariba Best Practice Center Knowledge Product

Overview

- **Permission:** The ability to create an analytical report is associated most closely with the Senior Analyst System Group. Other groups that can create reports:
 - ◆ Commodity Manager
 - ◆ Sourcing Manager
 - ◆ Contract Manager, Sales Contract Manager
- Reports can be placed on the dashboard so that those without permission can review the results of a report created by someone else.
- Reports can be hidden from others by saving it in a personal workspace or by setting up visibility for a report or it's folder

Overview

- **Reports can be stored in one of three places:**
 - ◆ **Prepackaged Reports:** These are reports that Ariba has created and Ariba maintains that cover some common reporting needs. Prepackaged Reports can't be changed, but they can be copied and changed and then either stored in the Personal Workspace or stored in Public Reports. Prepackaged Reports depend on the licensed solutions.
 - ◆ **Personal Workspace Reports:** Reports stored in the Personal Workspace are ones that are only accessible by the User.
 - ◆ **Public Reports:** Reports stored in the Public Reports area are available to all unless the report or it's folder have limited access set.



Overview

- Facts/Fact Tables: Groups of 'fields' (header fields or attributes on a workspace, for example). These are related to the different areas of the system, i.e. Sourcing Project, Contract Workspace (Procurement), Project Task, Business Contact, Event, etc.
- Measures: Numerical fields
- Dimensions: all other fields that are not Measures. Many of the values of dimensions are used to build pivots and for drill down. Example: Gender can be Male, Female or Unknown (the dimensions of gender) or the many dimensions of Commodity. Some dimensions (description and project ID, for example) are simply data fields.

Overview

- Hierarchies: are the expansion of a dimension within a complex structure. Example: UNSPSC commodities have 4 levels of definition with each level being more exact:
 - ◆ Information Technology
 - Computers and Peripherals
 - » Peripheral Devices
 - Trackball

The user can enter any *value* within the *hierarchy* which represents the true *value* of the *dimension* but the *value* exists most fully within its structure. In Analysis, any level might be important for either roll-up or drill-down.

Creating a Report

The screenshot shows the ARIBA Spend Management interface. The 'Contracts' tab is active, and the 'Create' menu is open, highlighting 'Analytical Report'. A yellow callout box with a red border points to this option, containing the text: **Start by clicking Create -> Analytical Report**.

Below the menu, the 'Create Analysis' dialog is shown with three numbered steps: **1 Source Data**, **2 Pivot Layout**, and **3 Refine Data**. A yellow callout box with a red border points to these steps, containing the text: **There are 3 steps**.

The main form is titled 'Report387998 - Untitled Analytical Report'. It includes a title field with the text 'Report387998 - Untitled Analytical Repo', a description field, and a 'Report Currency' dropdown set to 'User Preference'. Under the 'DATA SOURCES' section, there are three fact selection fields: 'Main Fact: * Contract', 'Second Fact: (None selected)', and 'Third Fact: (None selected)'. At the bottom, there is an 'Available Measures' section with a dropdown menu currently showing 'Pre-defined'.



Creating a Report

1 Source Data

2 Pivot Layout

3 Refine Data

Name your report, provide an optional Description.

Report For Contract 'How To' Slides

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

Title: * Report For Contract 'How To' Slides

Description:

Report Currency: User Preference

DATA SOURCES

Main Fact: * Contract Workspace (Procurement)

Second Fact: (None selected)

Third Fact: (None selected)

Available Measures

▼ Pre-defined

Contract Amount per Year Amount

Duration

Creating a Report

1 Source Data

2 Pivot Layout

3 Refine Data

You can have up to 3 data sources (facts) joined in a report. The “joins” are predetermined by Ariba.

DATA SOURCES

A **Fact Table** is your source data – a collection of fields

Main Fact: * Contract Workspace (Procurement) i

Second Fact: Project Task i

Third Fact: (None selected) i

Data Options: Include Contract Workspace (Procurement) data that does not match Project Task data

The Main Fact is the first level of the data sources. In this case, selecting Workspace over Task means that the Workspace “drives” the selection of the Project Tasks to be included.

You may choose to include workspaces that have no tasks or only use workspaces that have tasks

Creating a Report

1 Source Data

2 Pivot Layout

3 Refine Data

Each report must have at least 1 measure. Measures will always be on the right side of the final report.

Fields are organized by Fact

Available Measures All

- Contract Workspace (Procurement)
 - Contract Amount
 - Contract Amount by Year Amount
 - Duration
 - Overall Savings Amount
 - Proposed Contract Amount (USD)
- Project Task
 - Avg Duration
 - Task Count
- User-defined
 - Create User-defined Field

Page Fields

There are default detail fields based on the Fact chosen

Row Fields

Data
[PCW] Project Count

Detail Fields
[PCW] Project Name
[PCW] Start Date
[PCW] Status
[PCW] State
[PCW] Owner

Creating a Report

- 1 Source Data
- 2 Pivot Layout
- 3 Refine Data

The Pivot Layout screen consists of 2 parts: a list of fields (Hierarchies and All Fields) and a layout for the pivot table.

Report For Contract 'How To' Slides

Drag a field from the list of available hierarchies or fields and drop it on a destination in the pivot table: page, row, or column. If you are creating a multi-fact report, you ...

Available Hierarchies ▾ All

▼ Contract Workspace (Procurement)

Affected Parties

- ▶ Certified Diversity (enriched)
- ▶ Certified Diversity (original)
- ▶ Diversity Business Enterprise (enriched)
- ▶ Diversity Business Enterprise (original)
- ▶ Diversity Summary (enriched)
- ▶ Diversity Summary (original)
- ▶ Geography (enriched)
- ▶ Geography (original)
- ▶ Industry Codes (enriched)
- ▶ Parentage Details (enriched)
- ▶ Supplier Details (enriched)
- ▶ Supplier Financials (enriched)
- ▶ Supplier Risk

Active Suppliers

Common Organization

Green

Page Fields

Column Fields

Row Fields

▼ Data
[PCW] Project Count

▼ Detail Fields

- [PCW] Project Name
- [PCW] Start Date
- [PCW] **Move to**
 - Page Field
 - Row Field
 - Column Field
 - Detail Field
 - Remove**

There is a default list of Detail Fields based on the selection of the Main Fact. Click on the field name to get the field menu and click *Remove* to take care of unneeded fields.

Show detail fields in report.



Creating a Report

- 1 Source Data
- 2 Pivot Layout
- 3 Refine Data

The list of fields has 2 displays: Available Fields and Available Hierarchies



Some fields have a hierarchical structure, such as Region or Commodity. Click on Available Fields to get the full structure of the hierarchy.

Other fields, such as Project ID, do not have a hierarchy structure and, so, only show up on Available Fields. Be sure to check both lists to find fields.

Available Hierarchies	Available Fields
Year	Budget Okay
Based on Project...	Commodity
Project Configuration	Commodity (L1)
Project Name	Commodity (L2)
Commodity	Commodity (L3)
Commodity	Commodity ID
UNSPSC	Commodity ID (L1)
Conf in Place	Commodity ID (L2)
Conf in Place	Commodity ID (L3)
Contract	Conf in Place
Contract	

Commodity actually entered in the UI, regardless of the level.

Level 1, 2,3 for the commodity, regardless of the level entered.



Creating a Report

- 1 Source Data
- 2 Pivot Layout
- 3 Refine Data

Available Hierarchies ▾ All

- ▶ Contract Workspace (Procurement)
- ▶ Project Task

The list of fields is also organized by fact.

Different fields may have different selection choices (Hierarchies). Dates, for example, allow you to choose the actual date or convert to your fiscal year or display just the month or year.

Available Hierarchies ▾ All

Month

Year

Expiration Date

Calendar

Fiscal

Month

Year

Hierarchy Type

Hierarchy

Is Page Field

Is Row Field

Is Column Field

Is Detail Field

Is Test Project

Legal Entity Address

Legal Entity Address

Legal Entity Code

Legal Entity Code

To add to the layout, click on the field name and select the pivot location.

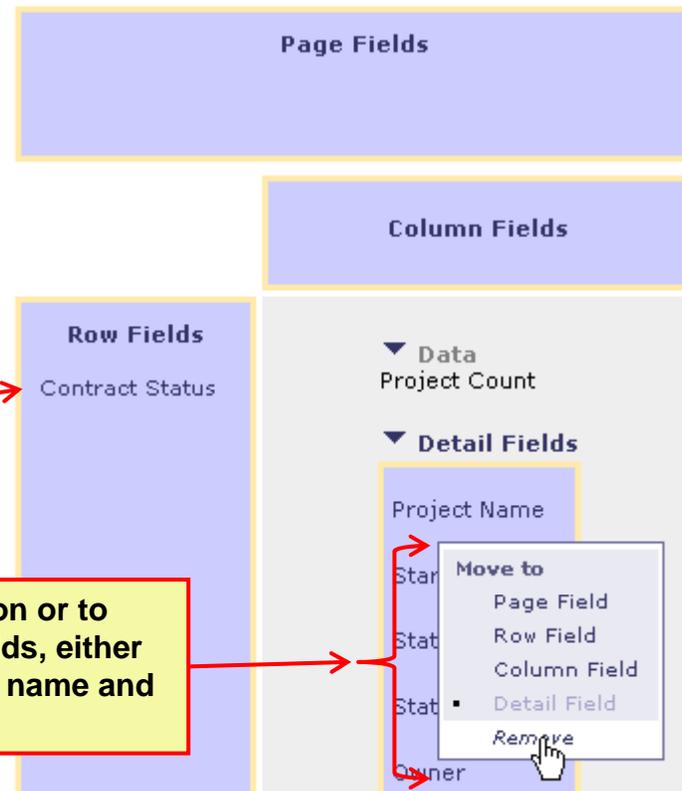
Creating a Report

- 1 Source Data
- 2 Pivot Layout
- 3 Refine Data

To move a field from the List of Fields to the Pivot Layout, either drag and drop or click on the field name link and select the pivot layout section



To move a field to another section or to return the field to the List of Fields, either drag and drop or click on a field name and select the action.



Creating a Report

- 1 Source Data
- 2 Pivot Layout
- 3 Refine Data

The right side of the screen displays the planned layout of the report. Add fields to Rows, Columns, Page and Detail

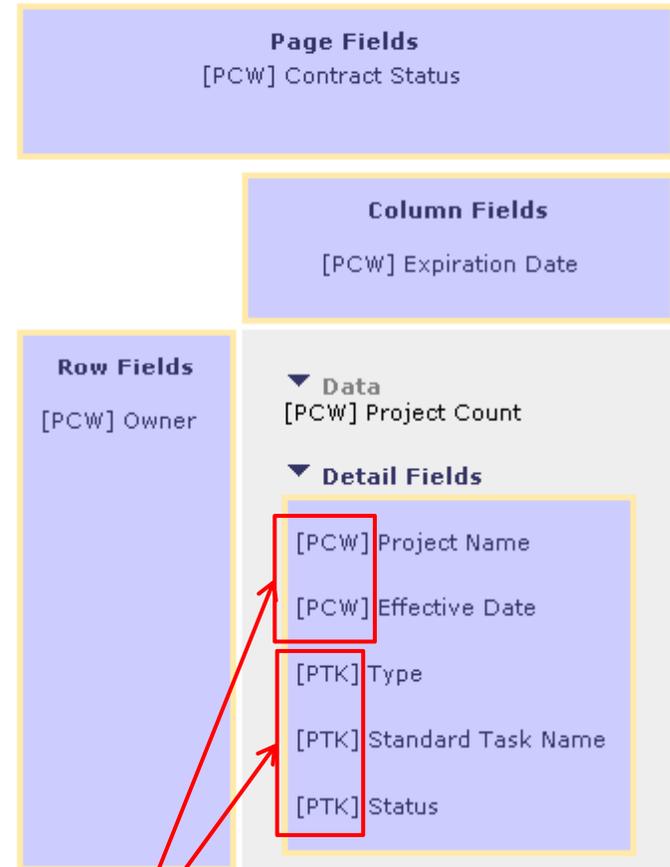
Row Field: a “Group by” for row values.

Column Field : a “Group by” for column values.

Detail Field: Additional field data that is displayed when looking at the “detail” view.

Data Field: is the measure (measures) selected on the Source Data screen.

Page Field: is a field that can both refine the data set (act as a filter) and count results without actually being a part of the report display.



Show detail fields in report.

Each field is preceded by a “fact” abbreviation so that the fact “source” is clear

Creating a Report

1 Source Data

2 Pivot Layout

3 Refine Data

Refine Data is used to filter data so as not to include the entire fact population.

Generally, use a relative date range so that the report can be used repetitively and pick up new data.

Report For Contract 'How To' Slides

Filter the data in your report by selecting values for the fields below. All reports include a date

[PCW]Start Date*
(Calendar):

Relative date range

Time period: Month(s)

Most recent 1 time periods

Future 0 time periods

Include current partial month

Fixed date range from: 9/1/2011 to: 9/30/2011

Advanced Options

Refine data using:

- [PCW]Start Date
- [PCW]Start Date
- [PCW]Due Date
- [PCW]End Date
- [PCW]Agreement Date
- [PCW]Effective Date
- [PCW]Expiration Date
- [PCW]Contract Signed Date
- [PCW]Project Start Date
- [PCW]Approved On

Date type: Calendar

Include data with

[PCW] Contract Status: (All)

Most reports have a basic filter for dates. You can change the date selection by checking the Advanced Options and selecting a different date, such as Expiration Date

However, note that a fixed date range can always be used. Also, even though grayed out, note that the date fields display the actual dates selected.

Creating a Report

- 1 Source Data
- 2 Pivot Layout
- 3 Refine Data**

Include data with c

[PCW] Contract Status:

[Customize this form](#)

[Show Report Query](#)

Contract Status ↑

Closed

Draft

Draft Amendment

Expired

Published

Unclassified

Include Exclude

Include selected items in the report

Page fields can be used as filters. Frequently a single value can be selected right from the refine data screen. However, multiple "Includes" or "Excludes" can be set up by clicking Select Others.

Include data with dat

[PCW] Contract Status:

Contract Status ↑

Draft

Draft Amendment

Published



Creating a Report

1 Source Data

2 Pivot Layout

3 Refine Data

Sometimes, additional filters may be needed for fields that are detail fields. Click Customize this form to access other available fields.

Report For Contract 'How To' Slides

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

[PCW]Start Date*
(Calendar):

Relative date range

Time period: Year(s)

Most recent 36 time periods

Future 36 time periods

Include current partial year

Fixed date range from: 1/1/1976 to: 12/31/2047

Advanced Options

[PCW] Contract Status: -- Include checked values --

Contract Status ↑

Draft

Draft Amendment

Published

Search for More

[Customize this form](#)

[Show Report Query](#)

Creating a Report

1 Source Data

2 Pivot Layout

3 Refine Data

Select the field(s) to show. Additional fields may be available after running the report

Customize Form Done

Customize the parameterized form for this analytical report. If you want the **ways show this** ... ▾

Always show this customized form

FORM FIELDS

Fields	Required	
[PCW] Contract Status	<input type="checkbox"/>	▲ ▼ ✕

HIDDEN FIELDS

Fields
[PCW] Owner
[PCW] Expiration Date

Show
Add this field to the form

Done

Creating a Report

1 Source Data

2 Pivot Layout

3 Refine Data

When ready, click Run Report.

Previous

Run Report

Save

Exit

Report For Contract 'How To' Slides

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

[PCW] Start Date*
(Calendar):

Relative date range

Time period: Year(s)

Most recent 36 time periods

Future 36 time periods

Include current partial year

Fixed date range from: 1/1/1976 to: 12/31/2047

Advanced Options

[PCW] Contract Status: -- Include checked values --

<input checked="" type="checkbox"/>	Contract Status ↑
<input checked="" type="checkbox"/>	Draft
<input checked="" type="checkbox"/>	Draft Amendment
<input checked="" type="checkbox"/>	Published
<input type="text"/>	Search for More

Configure the new field similarly to contract status

[PCW] Owner: (All)

Creating a Report

You could see what Chart results are produced or add the chart or basic report to your dashboard

The report displays in "Aggregate View" showing 191 total contracts, with the Owners on the left (row) and the contract expiration years across the top. 33 will expire in 2012.

Report For Contract 'How To' Slides Edit Save... Export Actions

Pivot table Chart Dashboard

Applied Filters

- 191 Start Date Spanning: most recent 36 Year(s) , future 36 Year(s)
- [PCW] Contract Status Draft, Draft Amendment, Published

Display Options Edit
Min/Max rows: 3/8
Layout: [Pivot Outline](#)

Aggregate View: Project Count [PCW] Expiration Date

[PCW] Owner	Unclassified	2008	2009	2010	2011	2012	2013	Total [PCW] Project Count ↓
Total	123	2	4	4	13	33	12	191
Default Owner	94	2	4	3	7	25	7	142
Matt Lyle (Corp Proc Mgr)	19			1	2	2	2	26
Customer Support Admin	9				4	6	2	21
John Doran	1							1
Sharon Horton							1	1

Applied Filters show the "refine data configuration"

[PCW] Owner

2012

Total [PCW] Project Count ↓



Creating a Report

Report For Contract 'How To' Slides

Edit Save... Export Actions ▾

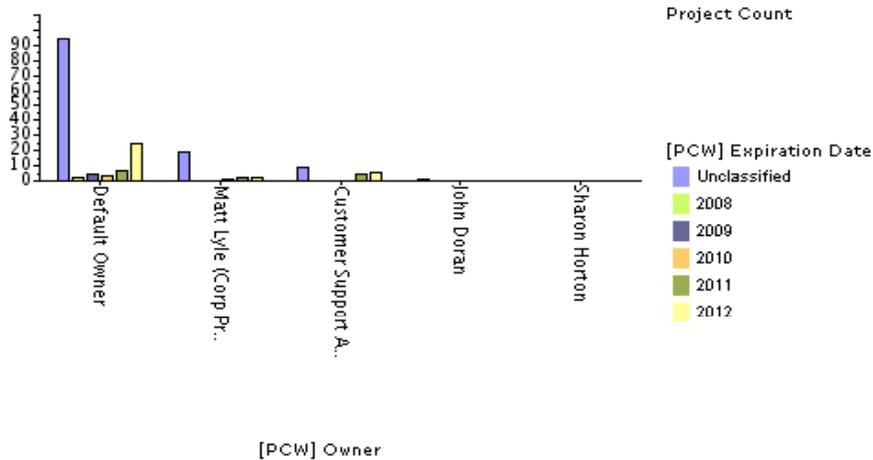
Pivot table Chart **Dashboard**

To add an analytical report to your dashboard, click **Add to Dashboard** next to the view you want to add to your dashboard, click ... ▾

CURRENT CHART

Click the Pivot Table tab to return.

Add to Dashboard



PIVOT TABLE

Add to Dashboard

Project Count

	Unclassified	2008	2009	2010	2011	Total
Total	123	2	4	4	13	191
Default Owner	94	2	4	3	7	142
Matt Lyle (Corp Proc...	19		1	2		26
Customer Support Adm...	9			4		21
John Doran	1					1
Sharon Horton	1					1

Creating a Report

To see the Details, Click
Aggregate View arrow and
select Show Detail View

Report For Contract 'How To' Slides

Edit Save... Export Actions ▾

Pivot table | Chart | Dashboard

▼ **Applied Filters**

- 191 Start Date Spanning: most recent 36 Year(s) , future 36 Year(s)
- [PCW] Contract Status Draft, Draft Amendment, Published

Display Options Edit
Min/Max rows: 3/8
Layout: Pivot Outline

Aggregate View: Project Count ▾ [PCW] Expiration Date ▾

	Unclassified	2008	2009	2010	2011	2012	2013	Total [PCW] Project Count ↓
	123	2	4	4	13	33	12	191
Draft	94	2	4	3	7	25	7	142
Customer Support Admin	19			1	2	2	2	26
John Doran	9				4	6	2	21
Sharon Horton	1						1	1

Field Settings
Edit in Wizard...
Show
▪ Aggregate View
Detail View



Creating a Report

Report For Contract 'How To' Slides

You could now make changes to your report to improve readability: make Project Name and Effective Dates Row fields, set Effective Date displays as a date field rather than a year.

Pivot table		Chart	Dashboard			
▼ Applied Filters						
• 191	Start Date	Spanning: most recent 36 Year(s) , future 36 Year(s)				
	[PCW] Contract Status	Draft, Draft Amendment, Published				
			Display Options Edit Min/Max rows: 3/8			
<input type="button" value="Detail View"/>						
[PCW] Owner	[PCW] Project Name	[PCW] Effective Date	[PTK] Type	[PTK] Standard Task Name	[PTK] Status	[PCW] Project Count ↓
Total						191
Customer Support Admin	10-1027 Ethos Systems Test Groups and Notices	2010	Approval	Approve Contract Documents	Complete	1
	10-1027 Ethos Systems Test Groups and Notices	2010	Review	Business Unit Review	Complete	1
	10-1027 Ethos Systems Test Groups and Notices	2010	Review	Legal Review	Complete	1
	10-1027 Ethos Systems Test Groups and Notices	2010	Review	Negotiate With Supplier	Complete	1
	10-1027 Ethos Systems Test Groups and Notices	2010	Todo	Deal Cancelled	Not Started	1
	10-1027 Ethos Systems Test Groups and Notices	2010	Todo	Prepare Documents	Complete	1



Creating a Report

You could now Edit,
Save or Export to Excel

Report For Contract 'How To' Slides

Edit Save... Export Actions

Pivot table | Chart | Dashboard

▼ Applied Filters

- 191 Start Date Spanning: most recent 36 Year(s) , future 36 Year(s)
- [PCW] Contract Status Draft, Draft Amendment, Published

Display Options Edit
Min/Max rows: 3/8

Detail View

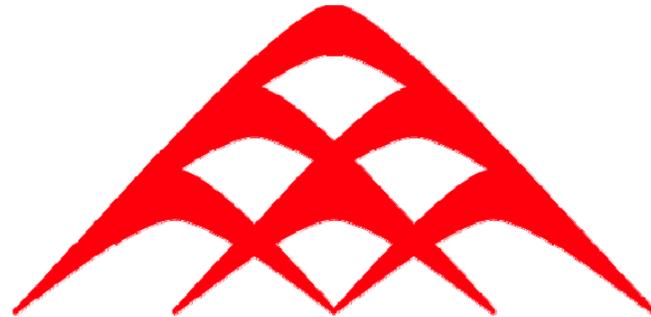
[PCW] Owner	[PCW] Project Name	[PCW] Effective Date	[PTK] Type	[PTK] Standard Task Name	[PTK] Status	[PCW] Project Count ↓
Total						191
Customer Support Admin	10-1027 Ethos Systems Test Groups and Notices	10/1/2010	Approval	Approve Contract Documents	Complete	1
			Review	Business Unit Review	Complete	1
			Review	Legal Review	Complete	1
			Review	Negotiate With Supplier	Complete	1
			Todo	Deal Cancelled	Not Started	1
			Todo	Prepare Documents	Complete	1
			Todo	Publish	Complete	1
			Todo	Send for Signatures	Complete	1
			Todo	Update Team Members	Complete	1
			Todo	Upload Documents-Finalize	Complete	1
			Todo	Upload Supplier Paper	Complete	1
			AA Horton Insurance Cert	4/19/2011	Notify	Notification Task For Any Reason
COI Test 2	5/1/2011	Notify	Notification Task For Any Reason	Not Started	1	
COI Test 3	5/1/2011	Approval	Approve Contract Documents	Not Started	1	

References

Ariba Contract Management Reporting and Analysis Guide

Ariba Sourcing Reporting and Analysis Guide





ARIBA®

This is Spend Management

