Updated: 12/6/2023

PURPOSE

This Quick Reference Guide (QRG) is designed to show how to perform searches for your own documents as well as other people's. A search for other people's documents must be done in the classic user interface (UI); searching for your own request and approval documents can be done in the Guided Buying interface.

HELPFUL HINTS

- Assemble all supporting documentation prior to beginning work in SAP Ariba.
- For the best experience, please use the following browsers:

  Google Chrome (64-bit)   Apple Safari (64-bit)

  Microsoft Edge (32-bit)   Microsoft Edge Chromium (32-bit and 64-bit)

  Mozilla Firefox (64-bit)

PROCEDURE

1. To access the classic UI from Guided Buying, click the "B&I Classic UI" tile.

2. To search for a particular type of document (e.g., invoice, PO, request, etc.), select the document type from the dropdown and click the "Search" icon, leaving the other fields blank.
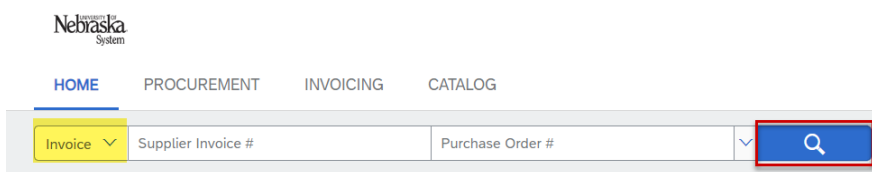
3. A 2-week span populates the "From/To" fields. To search for all documents regardless of date, click the *Invoice Date* dropdown and select "No Choice". Click "Search" if no other parameters are needed.
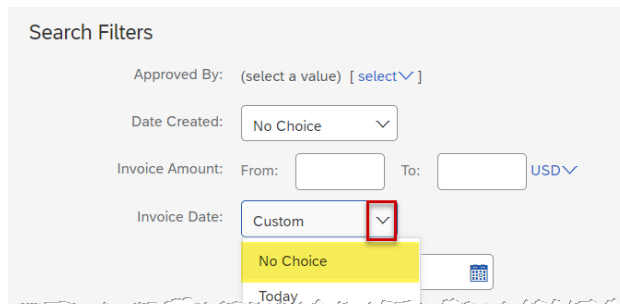
Note: If searching for document(s) created within a specific timeframe, change the "To/From" fields accordingly.

PROCEDURE (CONTINUED)

4. Searches can also be performed by Preparer, Status, Supplier, etc. Click the dropdown in each of these areas to select specific search criteria. To search for a specific preparer, for example, click the dropdown and click "Select from list…"

5. A *Choose Values for Preparer* dialog box opens. Search for employees by name (last name OR first name works best), email, or TrueYou ID. Select the name and click "Done".

A. Default is "Name". Select another parameter (e.g., email or TrueYou ID.).
B. Enter a name (e.g., last name **or** first name).
C. Click "Search". A list of search results matching that criteria displays below the search bar.
D. Select the desired name by checking the check box**.**
E. Click "Done"**.**

Note: Using the up/down arrow to the right of a column name (yellow highlight above) sorts columns in ascending or descending order.

6. The requestor name displays. Click "Search" to display results for that requestor.

Note: To add other search options, click the "Search Options" dropdown.

7. Search results display. Click an invoice number (blue hyperlink) to open the document.

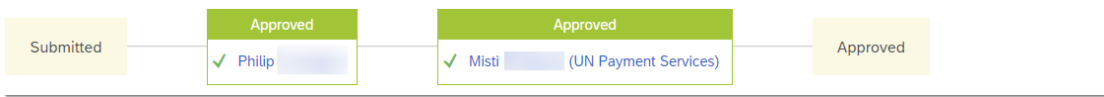|	Invoice # ↑	Invoice Date	Supplier	Invoice Amount	Max Discount	Scheduled Date	Status	Matched Order #
☐		5 Dec 2023	LIGHTHOUSE PIZZA	$0.00 USD			Composing	
☐		5 Dec 2023	LIGHTHOUSE PIZZA	$0.00 USD			Composing	
☐	23-29	19 Sep 2023	LURA M TOWNSEND	$180.00 USD	$0.00 USD	19 Sep 2023	Reconciled	

Search Results — Found 43 items

8. There are four tabs at the top of the screen: Summary, Approval Flow, Reference, and History. Each tab will display different information about the document.

Summary | Approval Flow | Reference | History

Header Information ∧

Invoice 23-29.pdf

Invoice Summary: $472.50 USD Details

Supplier:	0000422768 (LURA M TOWNSEND)	Payment Terms:	Net/Rcpt of Gds/Inv
Supplier Contact:	LURA M TOWNSEND	Ship From:	LURA M TOWNSEND
Invoice ID:	INV23-43-648		220 TAYLOR ST
Supplier Invoice #:	23-43		Saint PAUL NE 68873
Invoice Date:	Fri, 27 Oct, 2023		United States
Type:	Non-PO	ShipTo:	UNMC SHIPPING & RECEIVING
Supplier Sales Order #:	ⓘ		601 SOUTH SADDLE CREEK RD
On Behalf Of:	Tamara		OMAHA NE 68106
Invoice Submission Method:	Paper Invoice		United States
Invoice Origin:	Supplier	Unloading point:	Tamara
Company Code:	1000 (University of Nebraska)		
My Labels:	Apply Label... ∨ ⓘ		

Summary | **Approval Flow** | Reference | History

Submitted	**Approved** ✓ Philip	**Approved** ✓ Misti (UN Payment Services)	Approved

Summary | Approval Flow | **Reference** | History

Reconciliation

ID ↑	Date Created	Supplier	Status	Summary
IR23-43-648	Tue, 31 Oct, 2023	0000422768 (LURA M TOWNSEND)	Paid	$472.50 USD

Summary | Approval Flow | Reference | **History**

History

Date ↓	User	Real User	Action	Summary
Tue, 31 Oct, 2023 6:39 AM	aribasystem		Sent to Ariba Network.	Successfully sent to Ariba Network.
Tue, 31 Oct, 2023 6:39 AM	Misti	Misti	Approved	INV23-43-648 approved.
Mon, 30 Oct, 2023 1:40 PM	Philip	Philip	Approved	INV23-43-648 approved.
Mon, 30 Oct, 2023 1:28 PM	Tamara	Tamara	Submitted	INV23-43-648 submitted for approval.

University of Nebraska System

ADDITIONAL FUNCTIONALITY

To display more search result details (e.g., Requestor, Date Submitted, etc.), click the "Table Options Menu" (▦) icon. Click the double down arrows to expand/collapse the table..

	Invoice # ↑	Invoice Date	Supplier	Invoice Amount	Max Discount	Scheduled Date	Status	Requester	Matched Order #
☐		5 Dec 2023	LIGHTHOUSE PIZZA	$0.00 USD			Composing	Tamara	
☐		5 Dec 2023	LIGHTHOUSE PIZZA	$0.00 USD			Composing	Tamara	
☐	23-29	19 Sep 2023	LURA M TOWNSEND	$180.00 USD	$0.00 USD	19 Sep 2023	Reconciled	Tamara	

Search Results — Found 43 items

Note: There is a "More…" option when the Table Options Menu (▦) is selected that displays additional choices (e.g., Requestor).

Invoice Submission Method
✓ Invoice #
  ID
✓ Invoice Date
  Title
✓ Supplier
✓ Invoice Amount
  Date Created
✓ Max Discount
✓ Scheduled Date
  More…

Show / Hide Columns [OK] [Cancel]

	Column Name
☐	Invoice Submission Method
☑	Invoice #
☐	ID
☑	Invoice Date
☐	Title
☑	Supplier
☑	Invoice Amount
☐	Date Created
☑	Max Discount
☑	Scheduled Date
☑	Status
☐	Date Submitted
☐	Extended Status
☑	Requester

[OK] [Cancel]

When performing multiple searches, it is recommended that users click the "Reset" button to clear previous search results. Searches can also be saved.

Invoice Type:	No Choice ▽		Supplier:	(select a value) [select]
			Supplier Invoice #:	

[Search] [Reset] [Save Search]

To save a search, click the "Save Search" button.

Updated: 12/6/2023

ADDITIONAL FUNCTIONALITY (CONTINUED)

Enter a search name and select whether you want the search to be public or for your use only. Click "OK".

Your search will be saved and can retrieved from the left-hand pane whenever a search is performed.

To modify a saved search, select the search and click the "Refine" button. (i.e., edited) and/or deleted once selected. To delete saved search, select it and click the "Delete" button.

Click OK"