

SAP Ariba

PROCUREMENT SERVICES DIVISION



End-USER Training

P2PCore – Display Only
How to Request Display
Access and System
Navigation

The purpose of this job aid is to show how to request 'Display Only' access to Ariba and how to navigate the system with this access.

Content

- **Requesting Roles**
- **Accessing and Navigating Ariba**
- **Displaying Requisitions and Purchase Orders**
- **Search and Display Contracts**
- **Search for Suppliers**
- **Reporting**

Additional resources and job aids can be found on PSD's Ariba webpage:

<https://www.lausd.org/Page/19812>

The 'Display Only' role is typically requested by users who need to have visibility of contracts, reporting, and orders but don't need to create or edit these items.

Requesting Roles

1

All users are encouraged to install the Azure Virtual Desktop to access SAP to request roles.

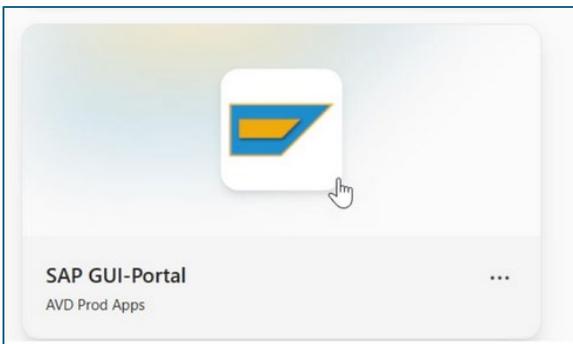
Windows Users: [Click here for Azure Virtual Desktop](#)

Mac Users: [Click here for Azure Virtual Desktop](#)

2

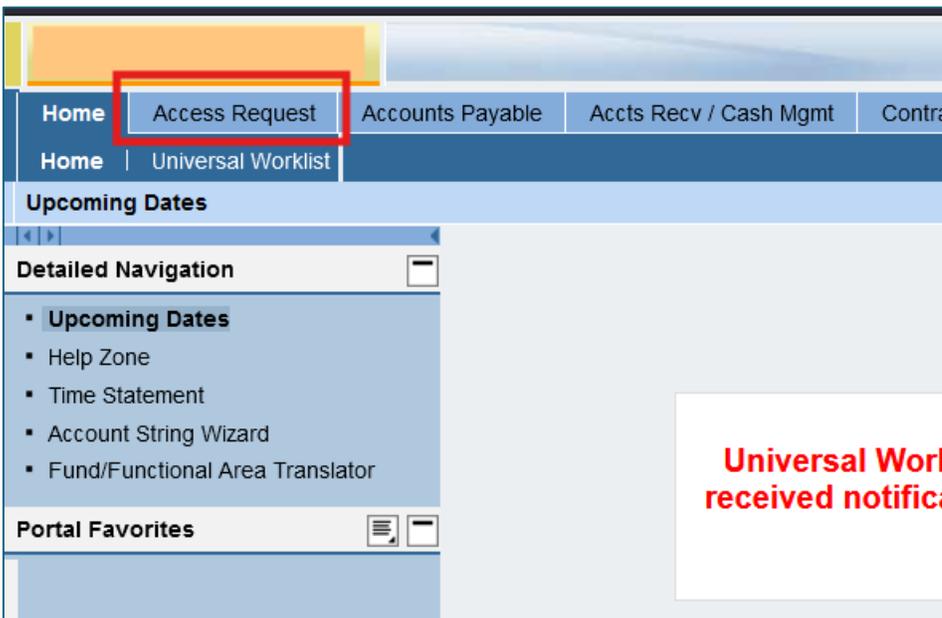
Log into the SAP Portal via the Remote Desktop Azure Virtual Desktop (AVD) or via the web version URL <https://apps.lausd.net> by using your Single Sign-On (SSO) username and password.

Then, click the SAP GUI-Portal tile to open.



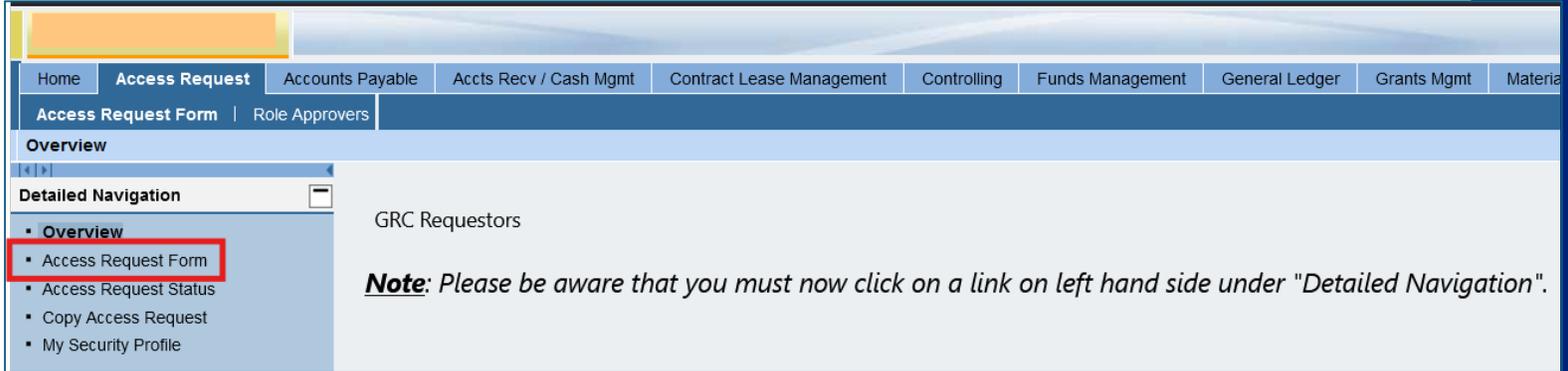
3

Once logged in, Click "**Access Request**" from the top tabs.



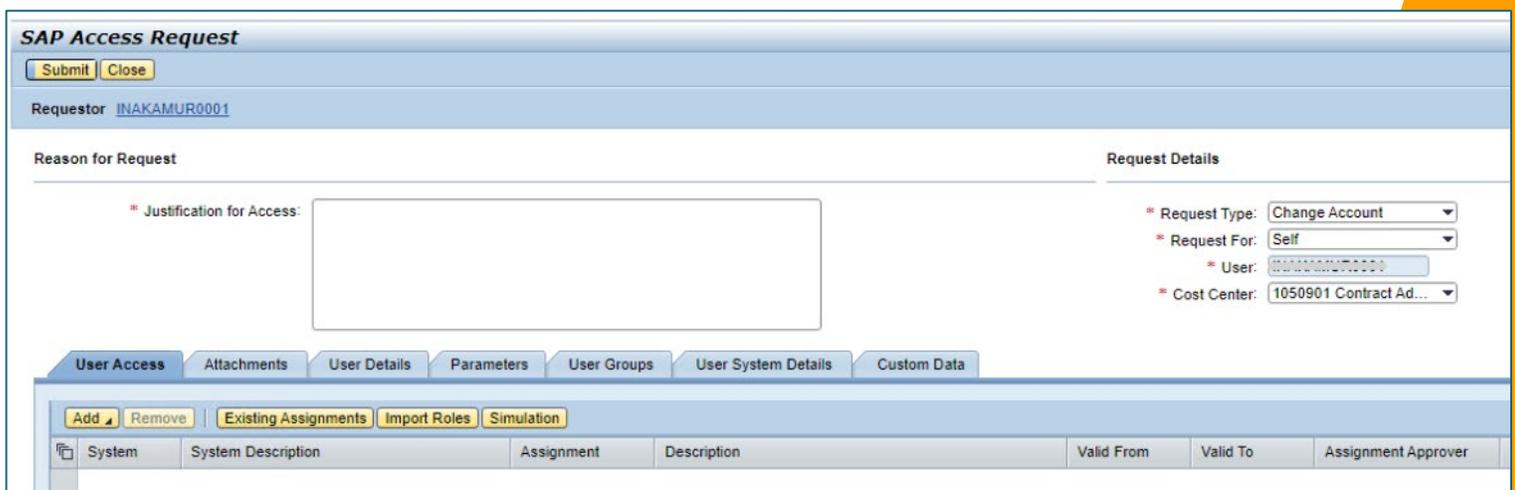
4

Click '**Access Request Form**' from the column on the left.



5

A blank access request form will display .



6

Complete the 'Justification for Access' field, please note this will be visible to the approver for your role request.

The screenshot shows the 'SAP Access Request' form. At the top, there are 'Submit' and 'Close' buttons. Below that is the 'Requestor' field. The main section is divided into 'Reason for Request' and 'Request Details'. The 'Reason for Request' section has a large text area labeled '* Justification for Access:' which is highlighted with a red border. The 'Request Details' section contains several dropdown menus: '* Request Type:' (Change Account), '* Request For:' (Self), '* User:' (a text field), and '* Cost Center:' (1014801 Summer Sc...). At the bottom, there are tabs for 'User Access', 'Attachments', 'User Details', 'Parameters', 'User Groups', 'User System Details', and 'Custom Data'.

7

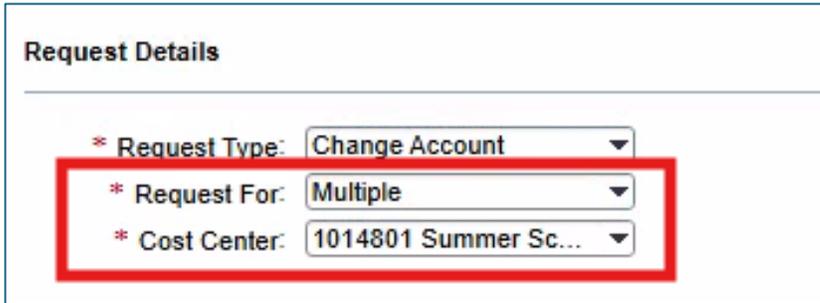
In the 'Request Details' section, you can indicate if the request is for yourself, or you can update the fields to submit the request for another user, or multiple users.

If you are requesting the access for someone else, make sure to update the 'User' and 'Cost Center' fields accordingly.

The image shows two side-by-side screenshots of the 'Request Details' section. The left screenshot shows the 'Request For:' dropdown menu open, with options 'Self', 'Other', and 'Multiple'. The 'Self' option is highlighted in yellow, and a red box highlights the dropdown arrow. The right screenshot shows the 'Request For:' dropdown menu set to 'Other'. The '* User:' field is highlighted with a red box and contains a copy icon. The '* Cost Center:' dropdown menu is also highlighted with a red box and shows the value '1014801 Summer Sc...'.

8

To enter a request for Multiple Users, select **'Multiple'** in the 'Request For' field, and update the Cost Center accordingly.



Request Details

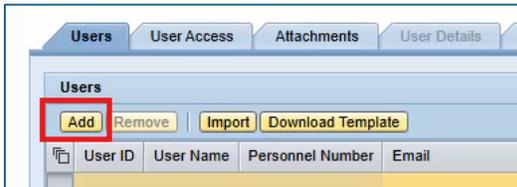
* Request Type: Change Account

* Request For: Multiple

* Cost Center: 1014801 Summer Sc...

9

In the user field which populates below, click **'Add'**



Users User Access Attachments User Details

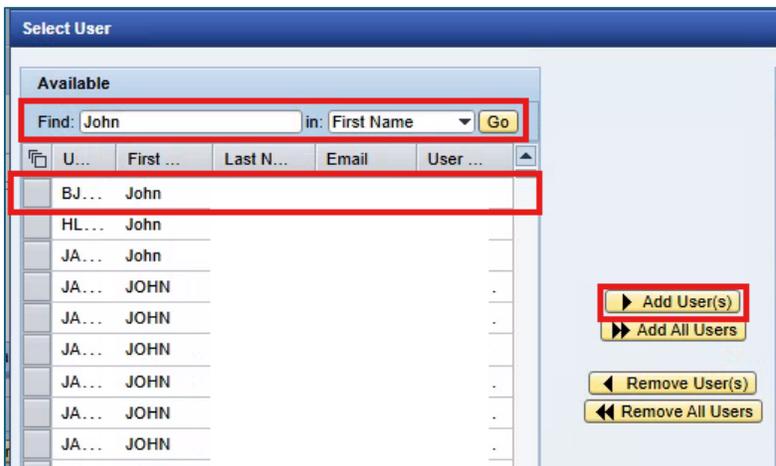
Users

Add Remove Import Download Template

User ID	User Name	Personnel Number	Email
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10

Search for users with the available filters and click **'Add User(s)'** to add them to the list on the right.



Select User

Available

Find: John in: First Name Go

U...	First ...	Last N...	Email	User ...
BJ...	John			
HL...	John			
JA...	JOHN			

Add User(s)

Add All Users

Remove User(s)

Remove All Users

13

A new box will open.

Select Roles

Search Criteria

Maximum number of result rows: 100

Cost Center is 1014801

Company is Los Angeles Unified School District

Business Process is

Subprocess is

Cost Center / Role Name is

Role Description is

Search Clear

Available

View: [Standard View]

Role Name	System	Description	System Description	Role Type	Default Roles
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Add Role(s) Add All Roles Remove Role(s) Remove All Roles

Selected

View: [Standard View]

Role Name	System	Description	System Description	Role Type
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OK Cancel

14

In the 'Cost Center / Role Name' field, enter SC490_0000 and then click '**Search**'

Select Roles

Search Criteria

Maximum number of result rows: 100

Cost Center is 1014801

Company is Los Angeles Unified School District

Business Process is

Subprocess is

Cost Center / Role Name is SC490_0000

Role Description is

Search Clear

15

Click the grey box to the left of the role's line. Then click '**Add Roles**'.

Cost Center / Role Name is SC490_0000
Role Description is

Search Clear

Available
View: [Standard View]

Role Name	System	Description	System Description	Role Type	Default Roles
SC490_0000	PARIBA	Ariba Solutions Displayer	SAP Ariba Procurement	Group	Exists (1)

Available
View: [Standard View]

Role Name	System	Description	System Description	Role Type
SC490_0000	PARIBA	Ariba Solutions Displayer	SAP Ariba Procurement	Group

Add Role(s) Add All Roles Remove Role(s) Remove All Roles

16

The added roles will then move to the **Selected** section

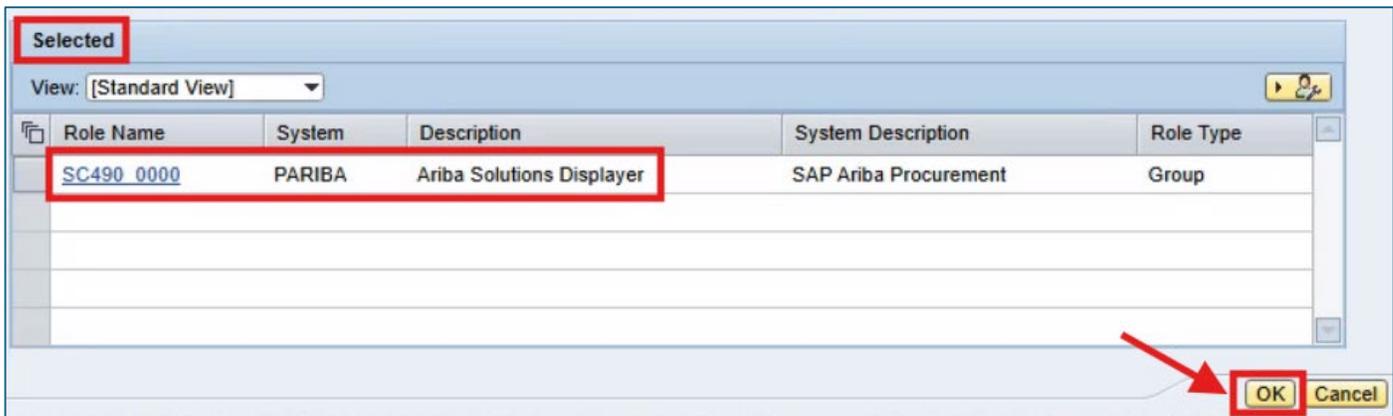
Add Role(s) Add All Roles Remove Role(s) Remove All Roles

Selected
View: [Standard View]

Role Name	System	Description	System Description	Role Type
SC490_0000	PARIBA	Ariba Solutions Displayer	SAP Ariba Procurement	Group

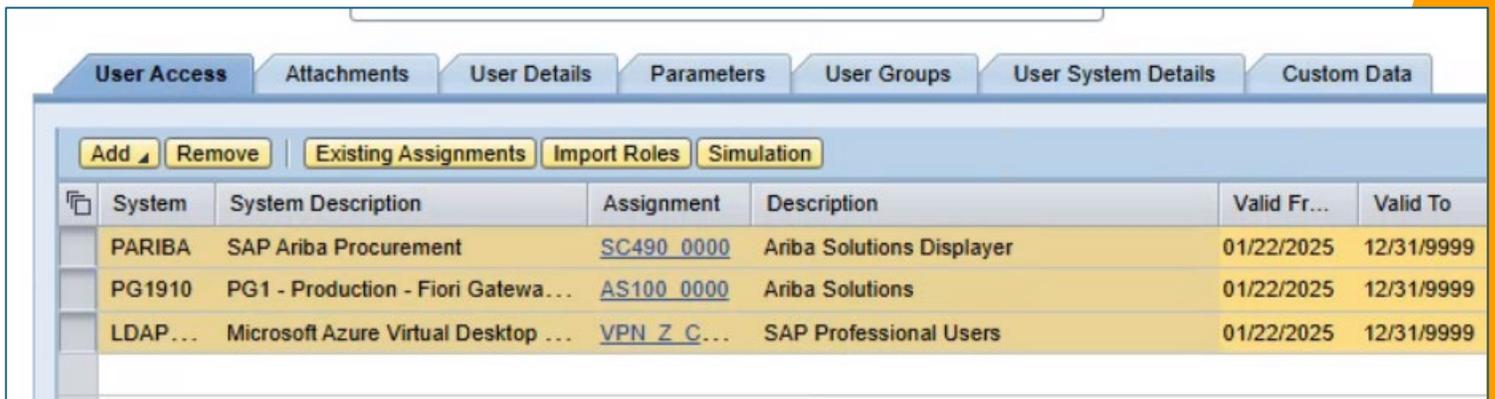
17

Once you confirm the role has been added to the **Selected** section, click '**OK**'.



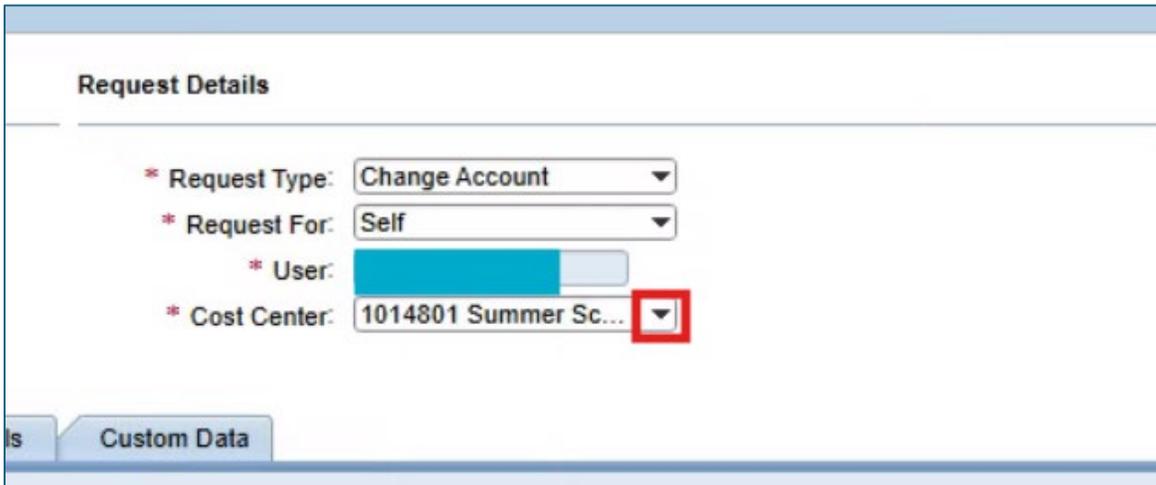
18

You will then see a list of roles under the User Access tab.



19

Scroll up to the **Request Details**. Ensure that your Cost Center and all other details are correct. If you need to update the Cost Center, click on the drop-down arrow to do so.



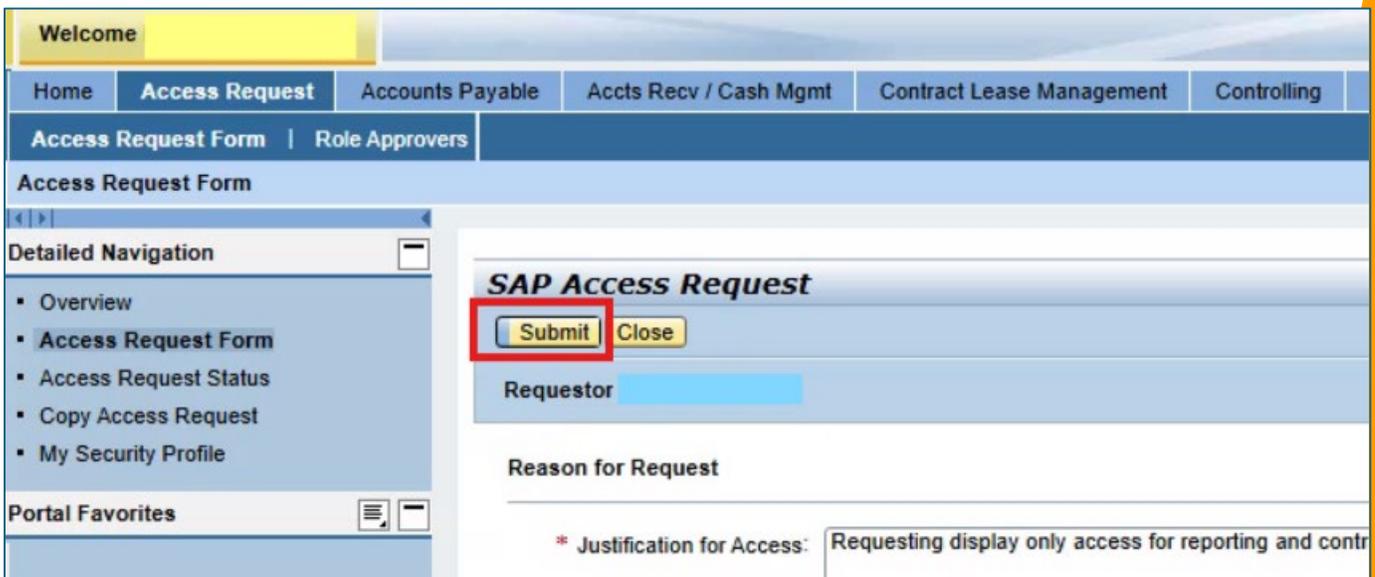
The screenshot shows the 'Request Details' section of an SAP interface. It contains several fields with asterisks indicating they are required:

- * Request Type: Change Account (dropdown menu)
- * Request For: Self (dropdown menu)
- * User: [Redacted]
- * Cost Center: 1014801 Summer Sc... (dropdown menu with a red box around the arrow)

At the bottom left, there is a 'Custom Data' tab.

20

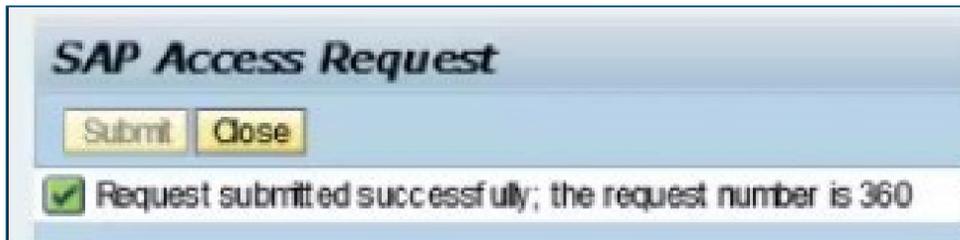
Click 'Submit' at the top left to submit your role request for approval.



The screenshot shows the 'SAP Access Request' form. At the top, there is a 'Welcome' banner and a navigation bar with tabs: Home, Access Request, Accounts Payable, Accts Recv / Cash Mgmt, Contract Lease Management, and Controlling. Below the navigation bar, there are tabs for 'Access Request Form' and 'Role Approvers'. The main content area is titled 'SAP Access Request' and contains a 'Submit' button (highlighted with a red box) and a 'Close' button. Below the buttons, there is a 'Requestor' field (redacted) and a 'Reason for Request' section. At the bottom, there is a 'Justification for Access' field with the text: 'Requesting display only access for reporting and contr'.

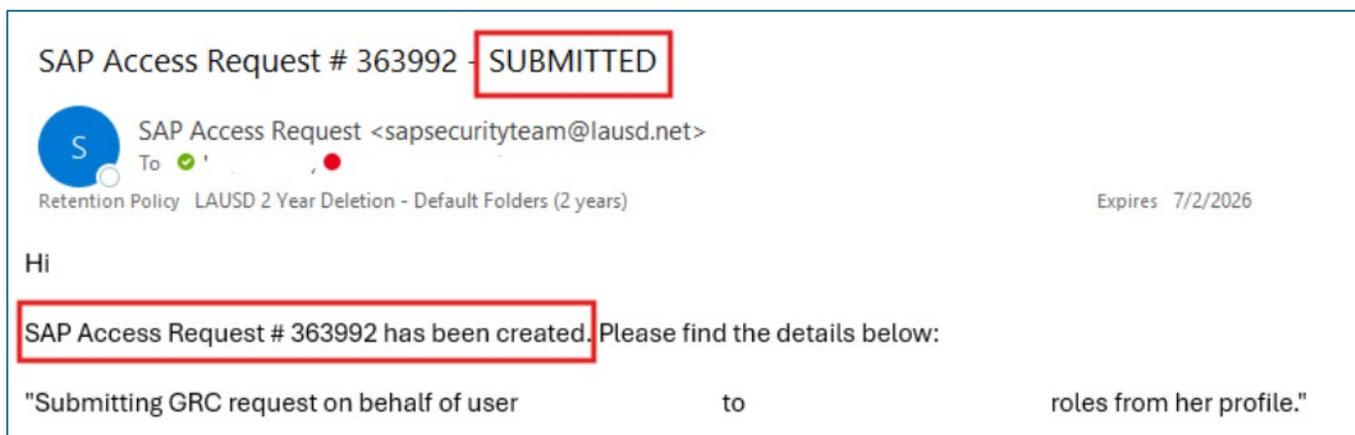
21

A message will display at the top of the form notifying you that your request was successfully submitted.



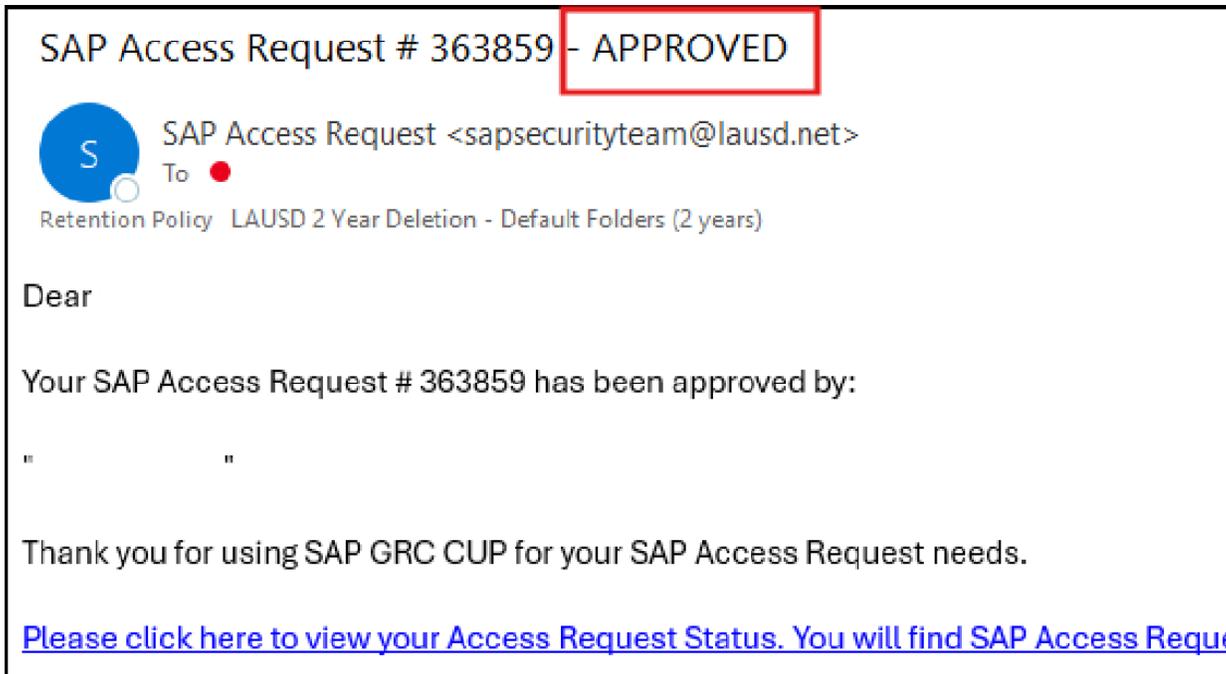
22

You will also receive an automated email with the request number and the list of roles requested. The first email is to notify you that the request was submitted.



23

Once the request is approved by the appropriate administrator, you will receive an email notification that your request was approved.



24

Now that your roles are active, we will review the login process and navigation of the system.

Accessing and Navigating Ariba

25

Ariba is accessed via LAUSD's Employee Self-Service (ESS).

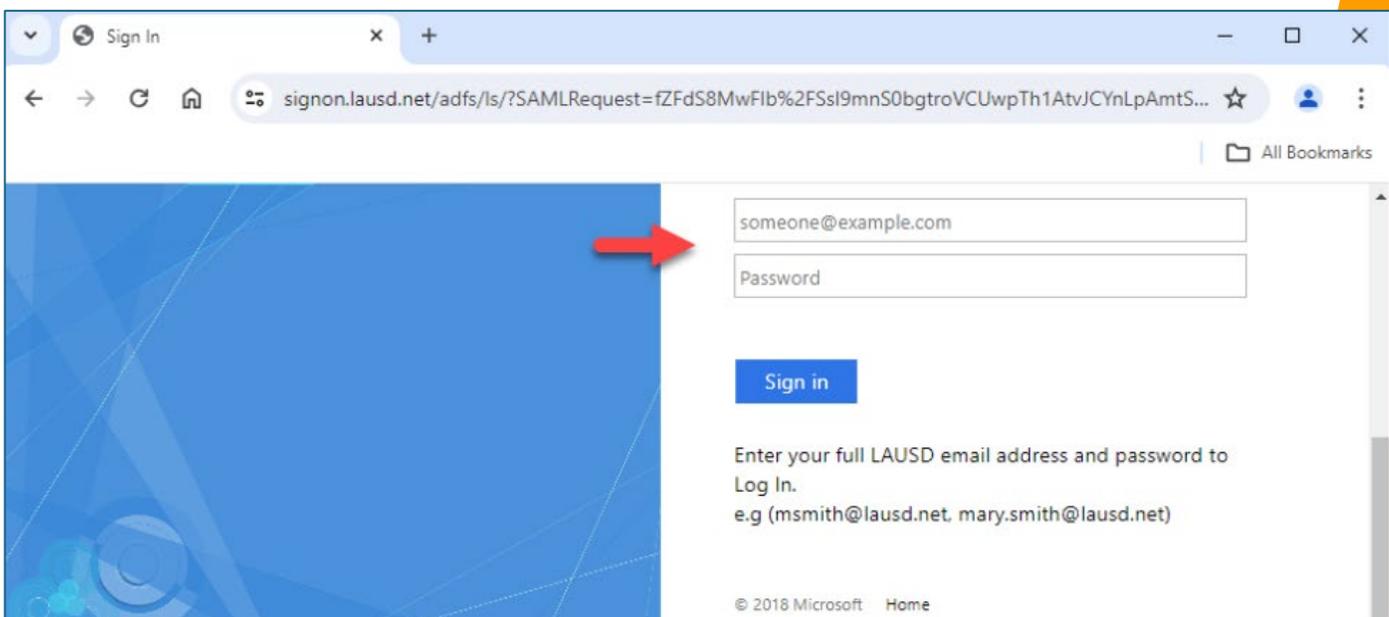
Please note that you must be on the LAUSD network or use a VPN to access.

Enter <https://ess.lausd.net> into the address field of a web browser.



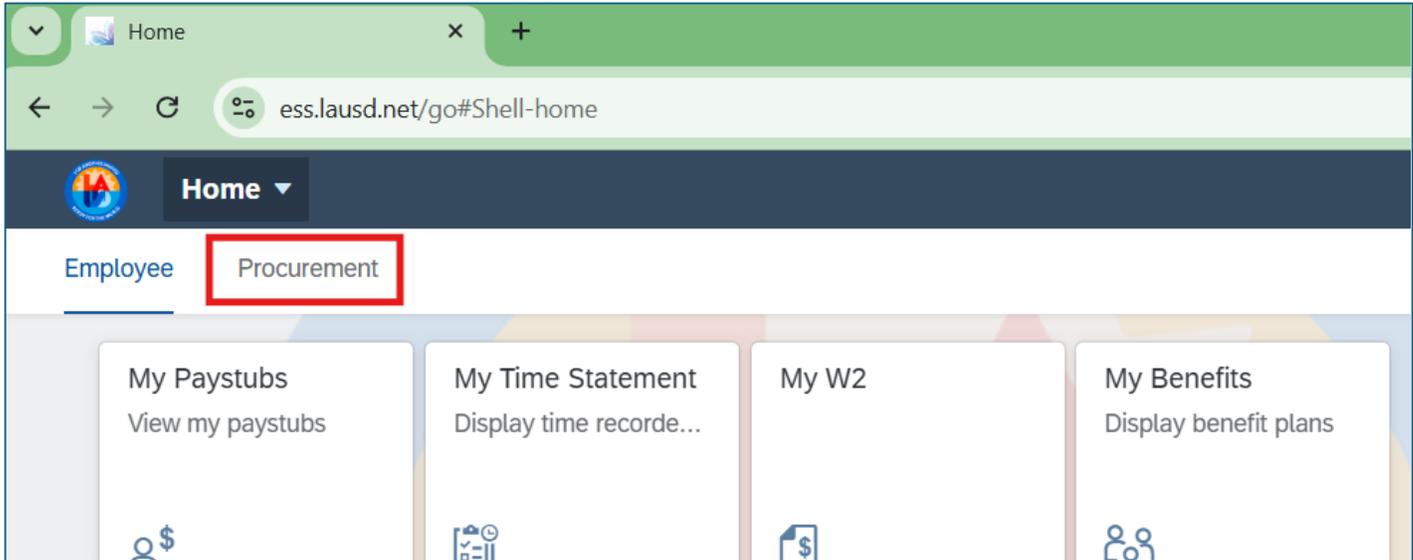
26

Enter your Single Sign On (SSO) information and click '**Sign In**' to sign in.



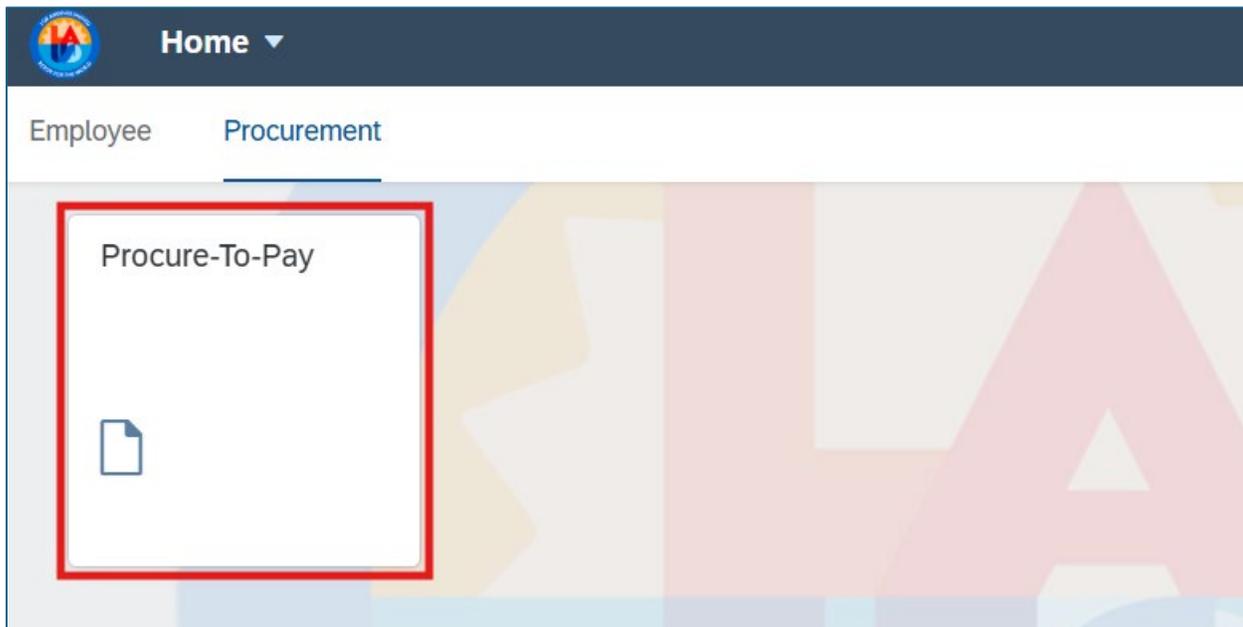
27

Click the '**Procurement**' tab, or scroll down to the Procurement Section.



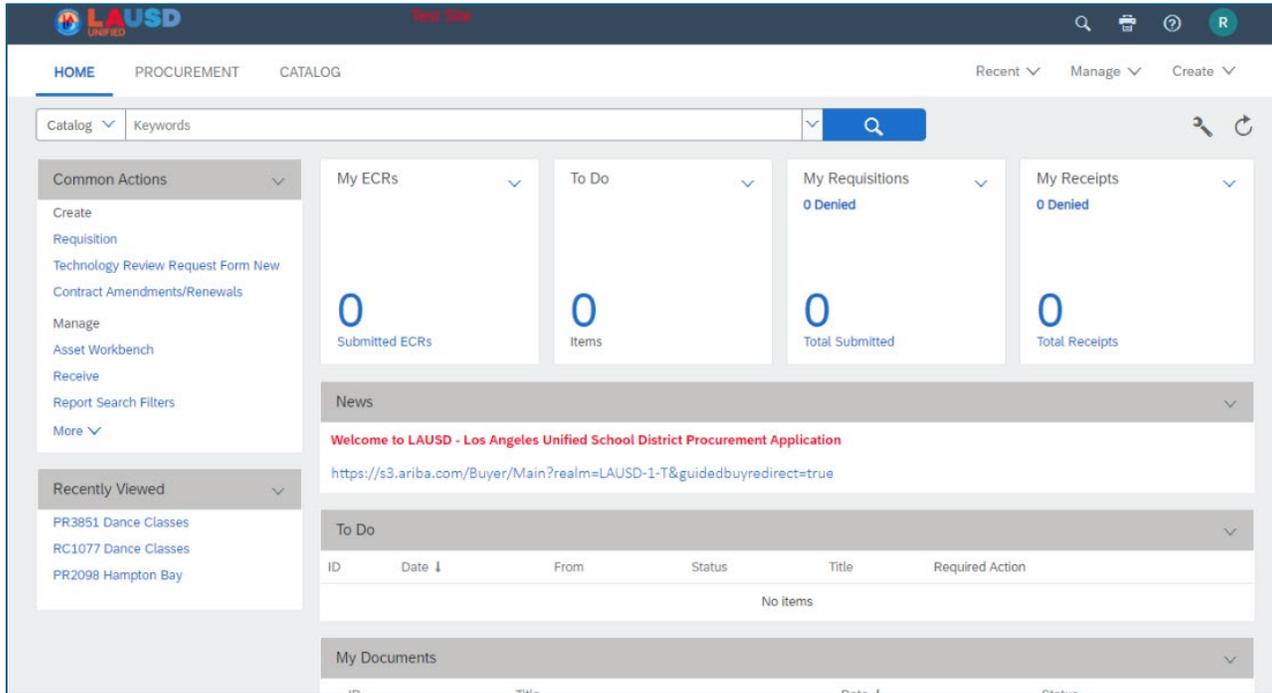
28

Click the tile under '**Procurement**' to access Ariba.



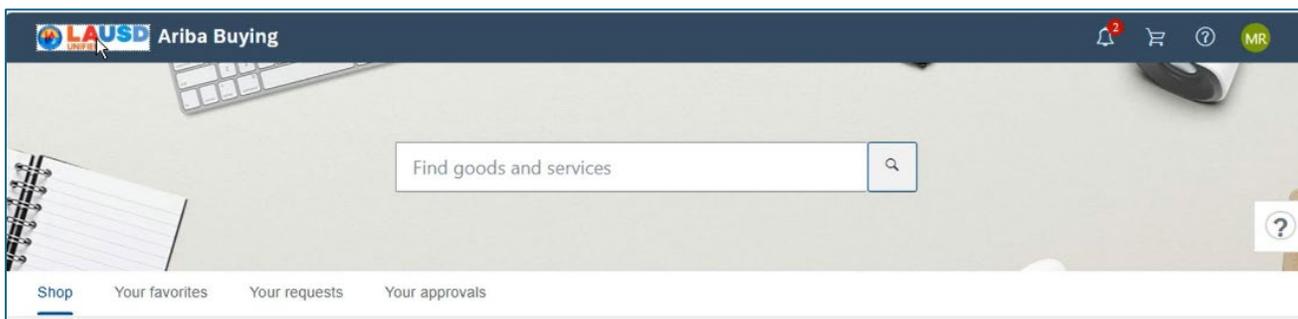
29

The Display user role routes users to the P2P Core interface of Ariba. The home screen appears as below and is customizable.



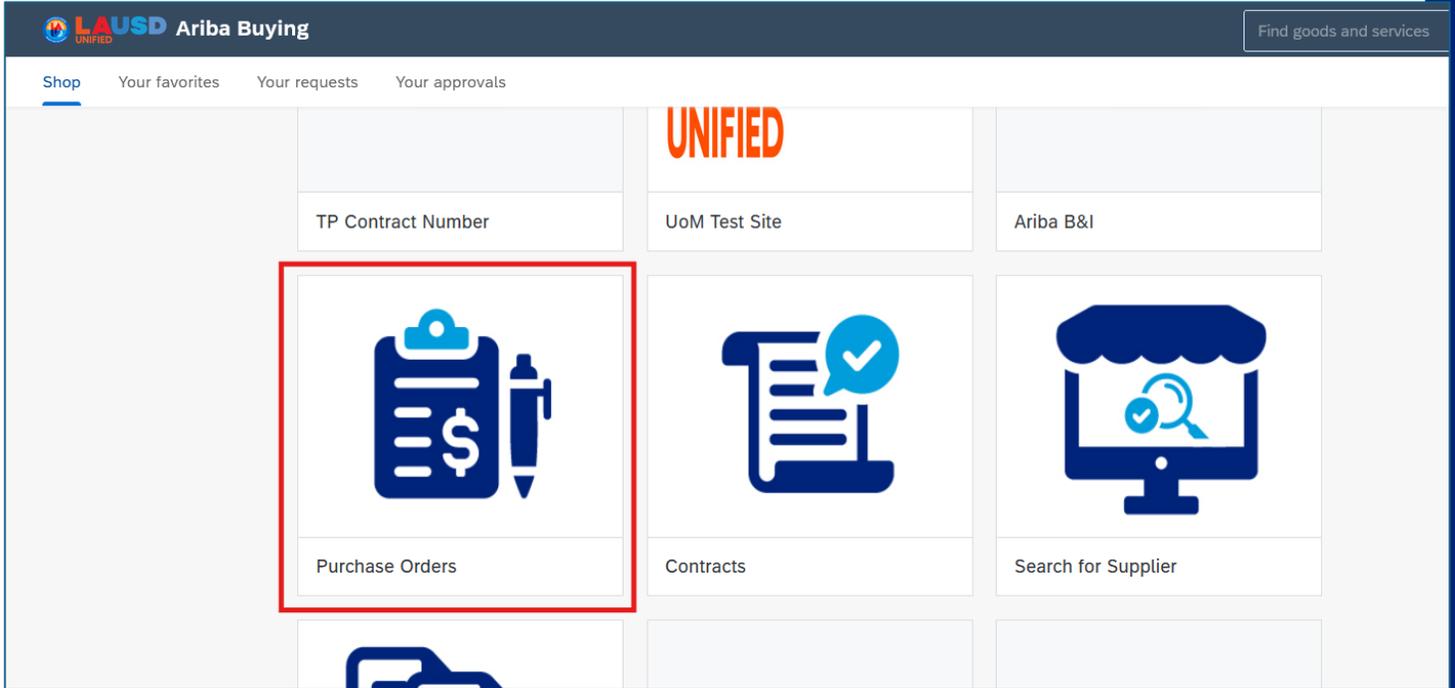
30

Some users may have existing roles in Ariba which will instead open the Guided Buying interface. The Guided Buying Dashboard appears as below.



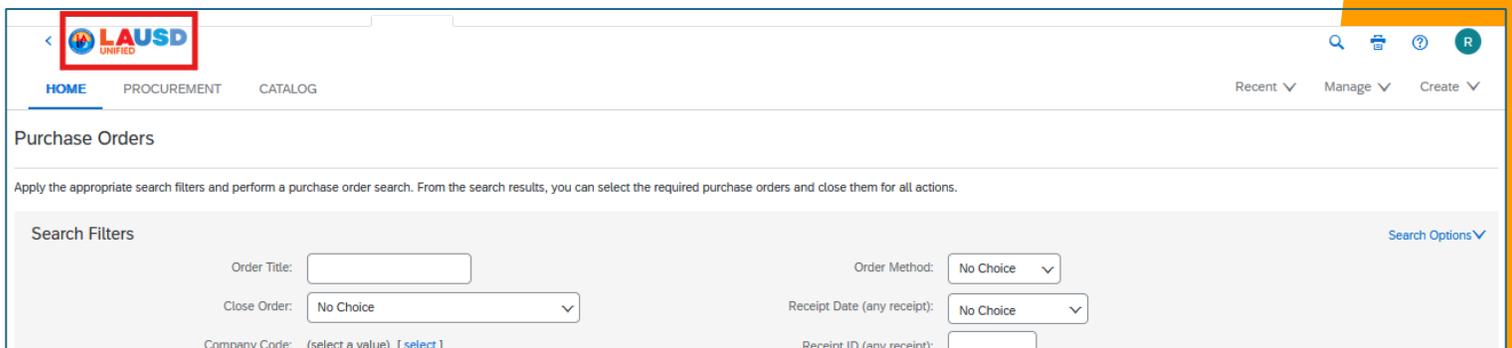
31

To access P2P Core from Guided Buying, scroll down and click the 'Purchase Orders' tile.



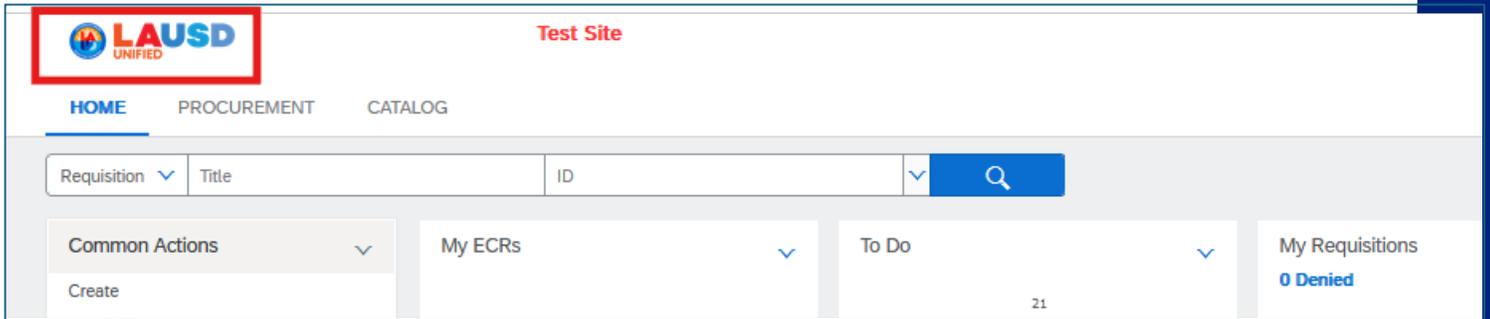
32

Selecting this tile routes you to P2P Core's Purchase Order Search. Click the LAUSD logo to be routed to the home page.



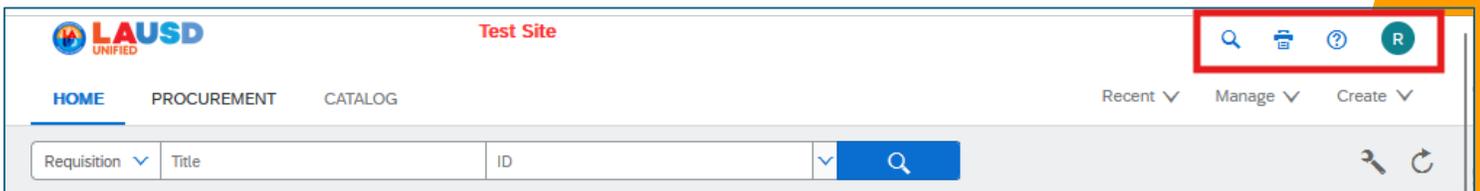
33

As you navigate Ariba, please note that the LAUSD logo acts as a home button which will return you to this screen.



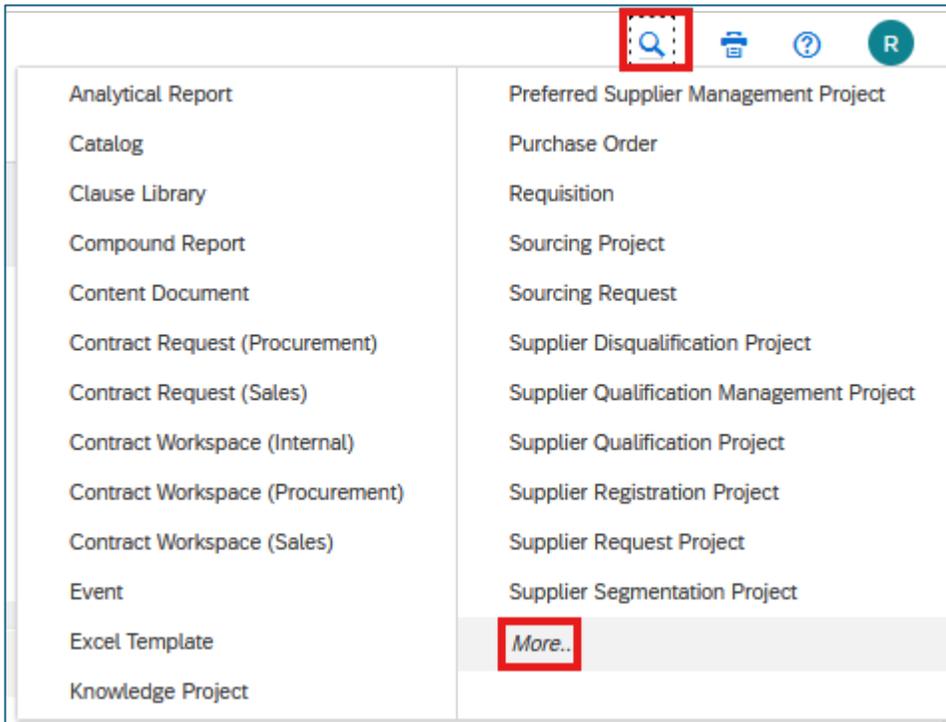
34

There are action icons in the top right of the page.



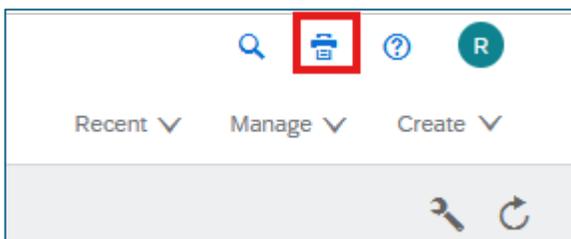
35

The magnifying glass icon opens a **search** menu. To open a search, select the type of document you are looking for. Click 'More..' to see additional search options.



36

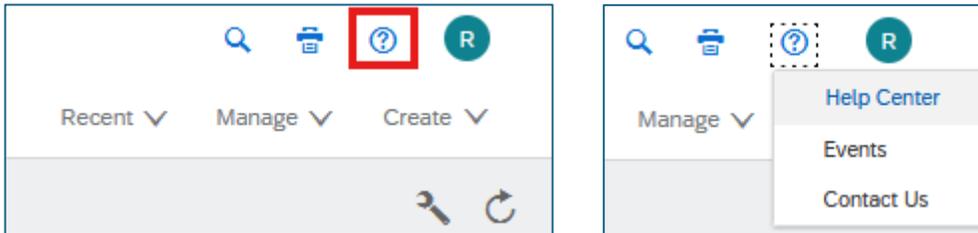
The printer icon allows you to **Print** or **Print to PDF** the current page you are viewing. Clicking the icon will open your system's print options.



37

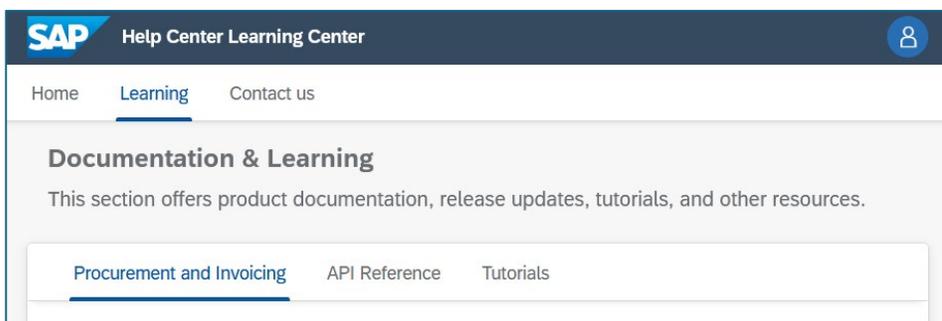
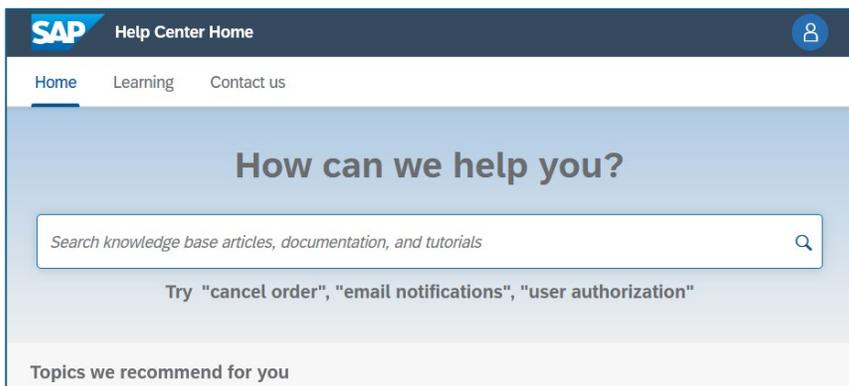
The '?' icon opens the Help Functionality.

Select the '**Help Center**' option to open SAP's Help Center in another window.



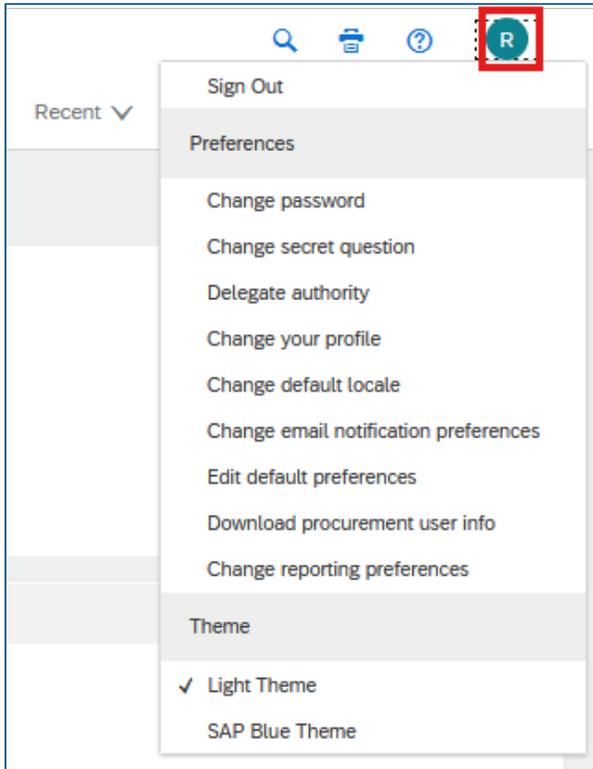
38

SAP's Help Center **Home Tab** can be used to search for generic system support. The **Learning Tab** contains SAP Ariba resources and training tutorials. *Please note that the responses and resources are not LAUSD specific.*



39

If you click the circle with your initials, it will open your user profile and setting options.



40

Please see additional training resources for guidance on updating and making changes to your User Preferences.

41

Ariba P2P Core contains both a Parent and Child Realm. Different information and features can be found in each.

- The **Parent Realm** contains Sourcing Projects, Sourcing Requests, and Contract Management. This is everything up to the point of signing a contract.
- The **Child Realm** contains Requisitions, Purchase Orders, Invoices, etc. This is everything that occurs after a contract is reached and transactions outside of a contract.

42

The bridge is the point where a supplier contract is signed

Upstream [Parent] realm

1. Supplier Selection
2. Sourcing
3. Contract Management

BEFORE contract signature



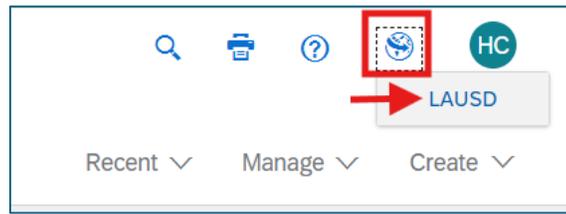
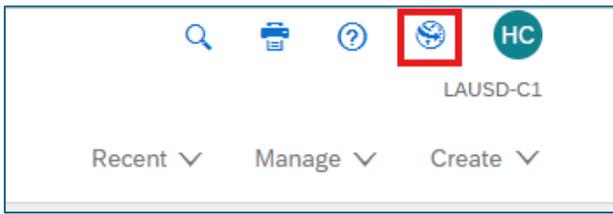
Downstream [Child] realm

1. Requisitions
2. Purchase Orders
3. Receipts
4. Invoices
5. Invoice Reconciliation
6. Payments

AFTER contract signature

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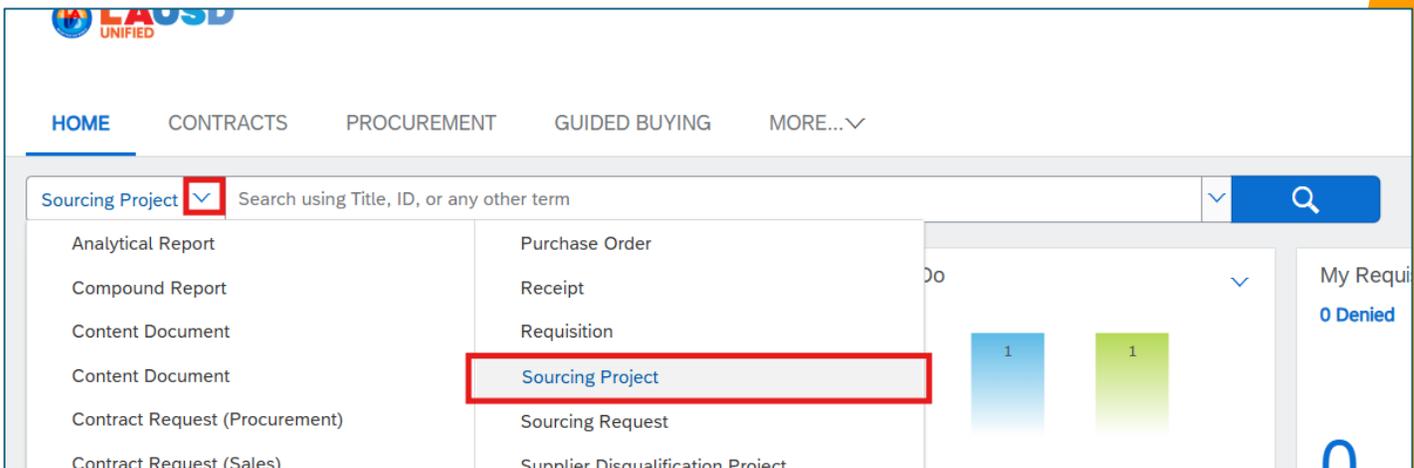
The **Site** icon, which looks like a globe with an arrow, can be used to toggle between the two realms. Click the icon, and then the name of the realm you wish to switch to.



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The main **Search** field allows you to search based on document type.

For example, if you needed to search for a particular Sourcing Project (IFB, RFP, RFQ, etc.) you would toggle the document type in the search bar of the parent realm to select 'Sourcing Project'



Search and Display Requisitions and Purchase Orders

The search function behaves similarly for many document types. In this example, we'll review how to search for a Purchase Requisition (PR).

45

To begin, ensure that you have selected **'Requisition'** as the document type in the search bar.

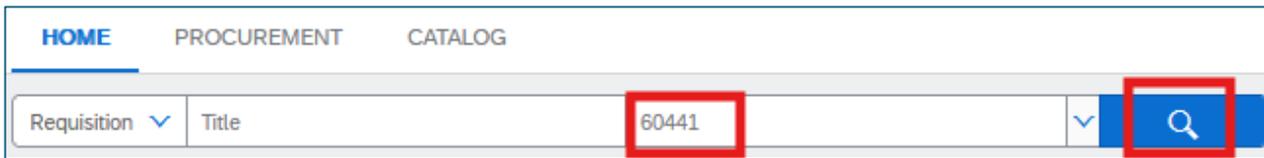
The screenshot shows a software interface with a navigation bar at the top containing 'HOME', 'CONTRACTS', 'PROCUREMENT', and 'MORE...'. Below the navigation bar is a search bar with a dropdown menu open. The dropdown menu is divided into two columns. The left column lists various document types, with 'Requisition' highlighted. The right column lists specific project names, with 'Receipt' highlighted. A search icon is visible in the top right corner of the search bar.

Requisition	Title	ID
Analytical Report		Receipt
Contract		Requisition
Contract Request		Sourcing Project
Contract Request (Procurement)		Sourcing Request
Contract Request (Sales)		Supplier Disqualification Project
Contract Workspace (Internal)		Supplier Qualification Management Project
Contract Workspace (Procurement)		Supplier Qualification Project
Contract Workspace (Sales)		Supplier Registration Project
Contractor Expense Sheet		Supplier Request Project
Event		Supplier Segmentation Project
Knowledge Project		Time Sheet
Preferred Supplier Management Project		More...
Purchase Order		

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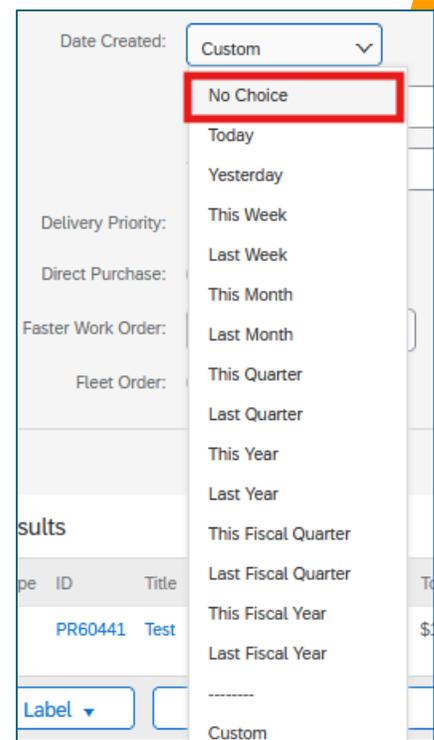
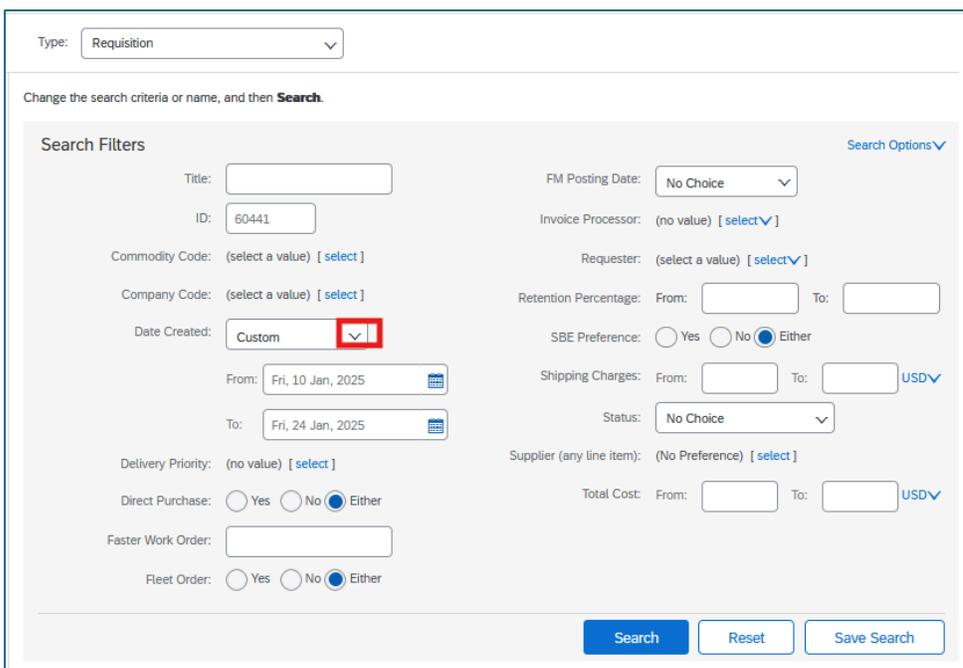
If you know the PR number, enter it in the field and then click the magnifying glass to search.

You may also search by Title. If you don't know the PR number and want to search for requisitions, click the magnifying glass from your home page without entering a title or ID to access the search filters



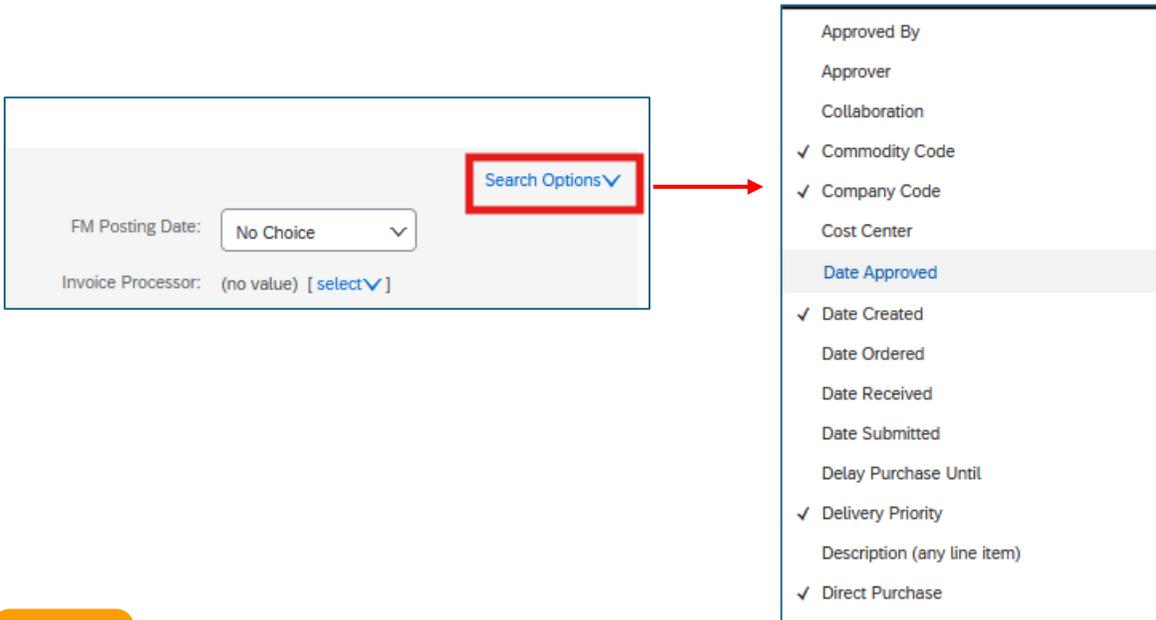
47

The next screen will show the search results and available filters. Ariba defaults the date range to 2 weeks. You can adjust or clear this filter with the dropdown next to 'Date Created'.



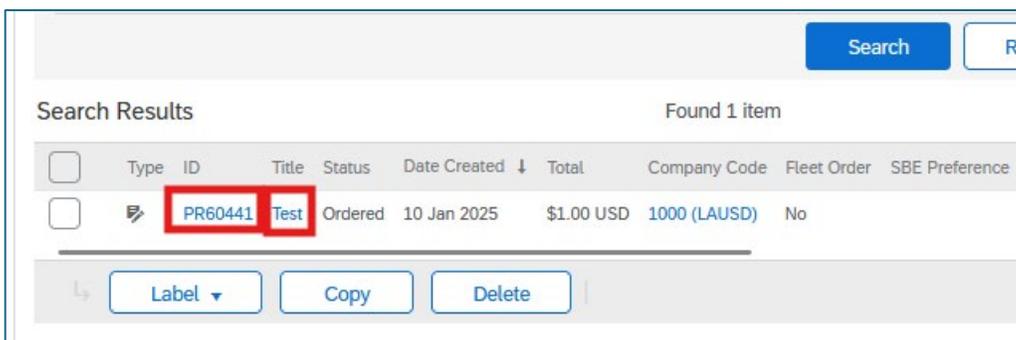
48

You can use the available filters to adjust your search, to add additional search filters and options, click the '**Search Options**' dropdown in the top right and make your desired selections.



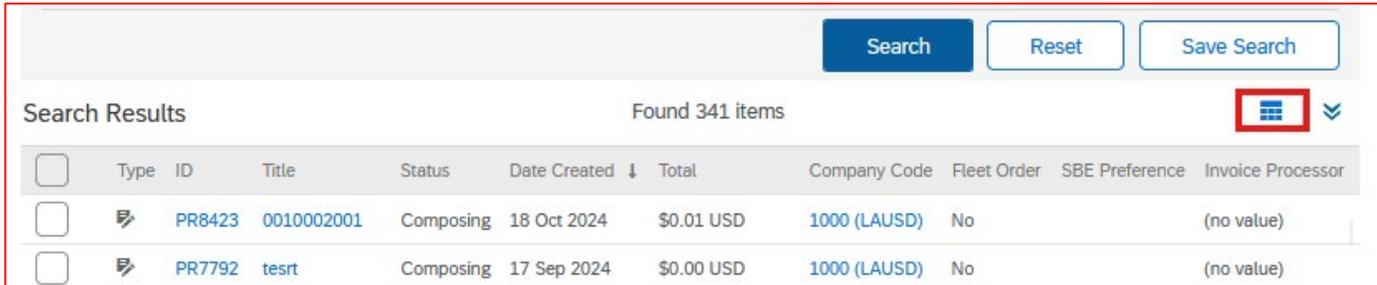
49

Click the Requisition's **ID** or **Title** to open the order.



50

If your search has a range of results, you can also export the results as an Excel document. To export the results, click the spreadsheet icon at the bottom right of the search field.

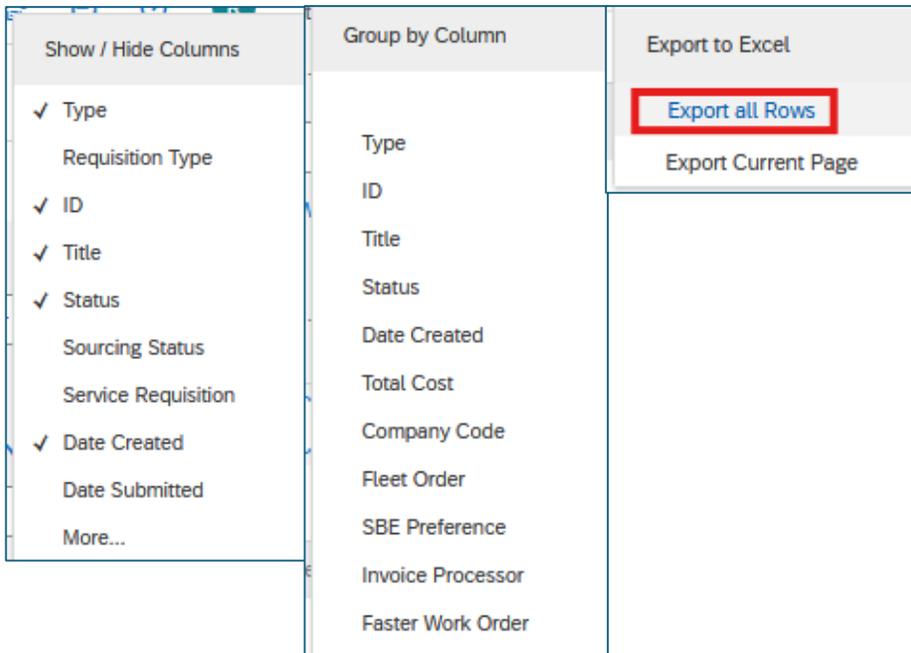


The screenshot shows a search interface with a search bar at the top containing 'Search', 'Reset', and 'Save Search' buttons. Below the search bar, it says 'Search Results' and 'Found 341 items'. A red box highlights a spreadsheet icon in the top right corner of the results area. Below this is a table with the following columns: Type, ID, Title, Status, Date Created, Total, Company Code, Fleet Order, SBE Preference, and Invoice Processor. Two rows of data are visible:

<input type="checkbox"/>	Type	ID	Title	Status	Date Created	Total	Company Code	Fleet Order	SBE Preference	Invoice Processor
<input type="checkbox"/>	PR8423	0010002001	Composing	18 Oct 2024	\$0.01 USD	1000 (LAUSD)	No	(no value)		
<input type="checkbox"/>	PR7792	testr	Composing	17 Sep 2024	\$0.00 USD	1000 (LAUSD)	No	(no value)		

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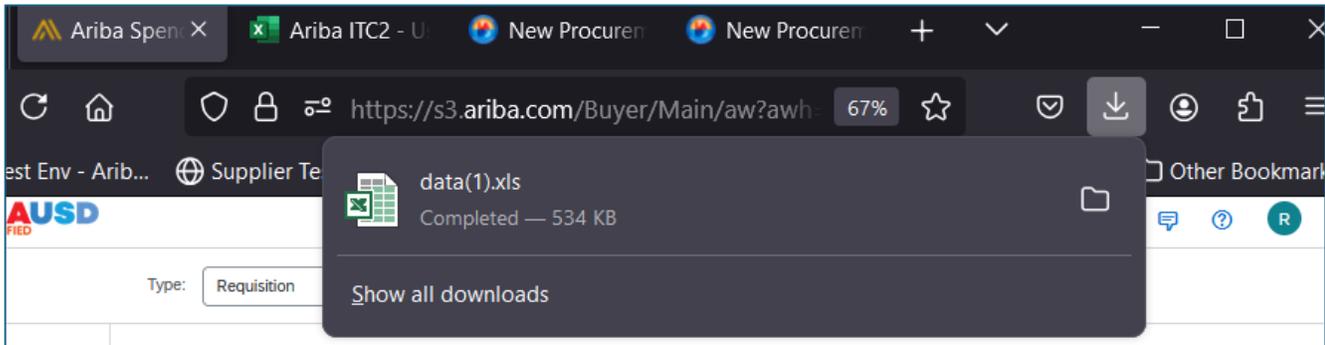
You can select additional data fields to include and set groupings for the results by checking additional selections. Click '**Export all Rows**' when you are ready.



The screenshot shows a configuration menu with three main sections: 'Show / Hide Columns', 'Group by Column', and 'Export to Excel'. The 'Show / Hide Columns' section has a list of items with checkboxes: Type (checked), Requisition Type, ID (checked), Title (checked), Status (checked), Sourcing Status, Service Requisition, Date Created (checked), Date Submitted, and More... The 'Group by Column' section has a list of items: Type, ID, Title, Status, Date Created, Total Cost, Company Code, Fleet Order, SBE Preference, Invoice Processor, and Faster Work Order. The 'Export to Excel' section has two buttons: 'Export all Rows' (highlighted with a red box) and 'Export Current Page'.

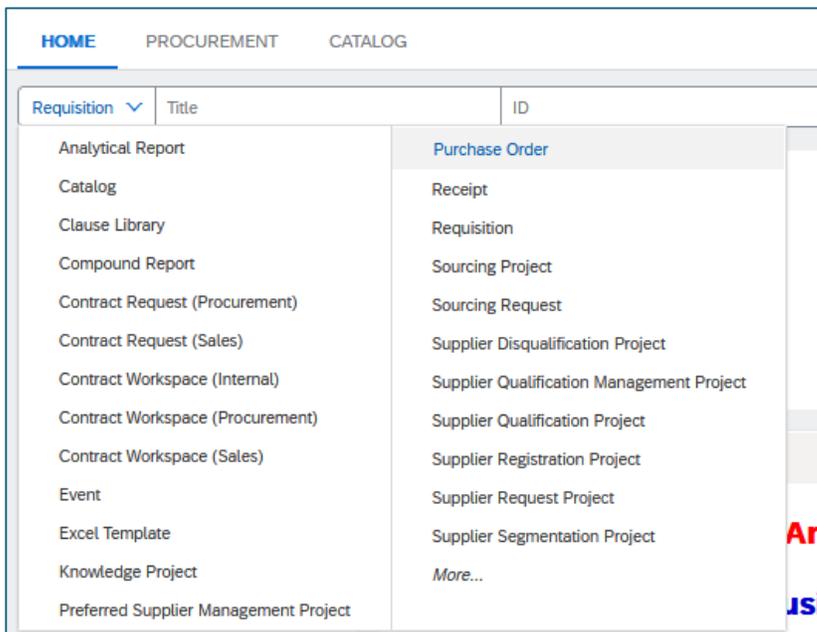
52

The resulting file will download for you to open and or save.



53

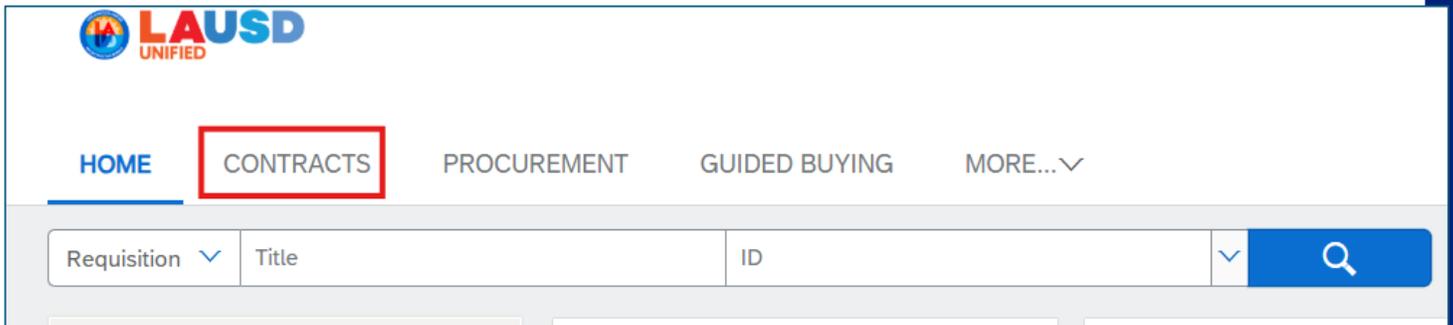
The search functionality works in the same way for other document types such as Purchase Orders (POs). Toggle the search menu for your desired document type (Purchase Order, Receipt, etc.) and complete your search as shown in the previous steps.



Search and Display Contracts

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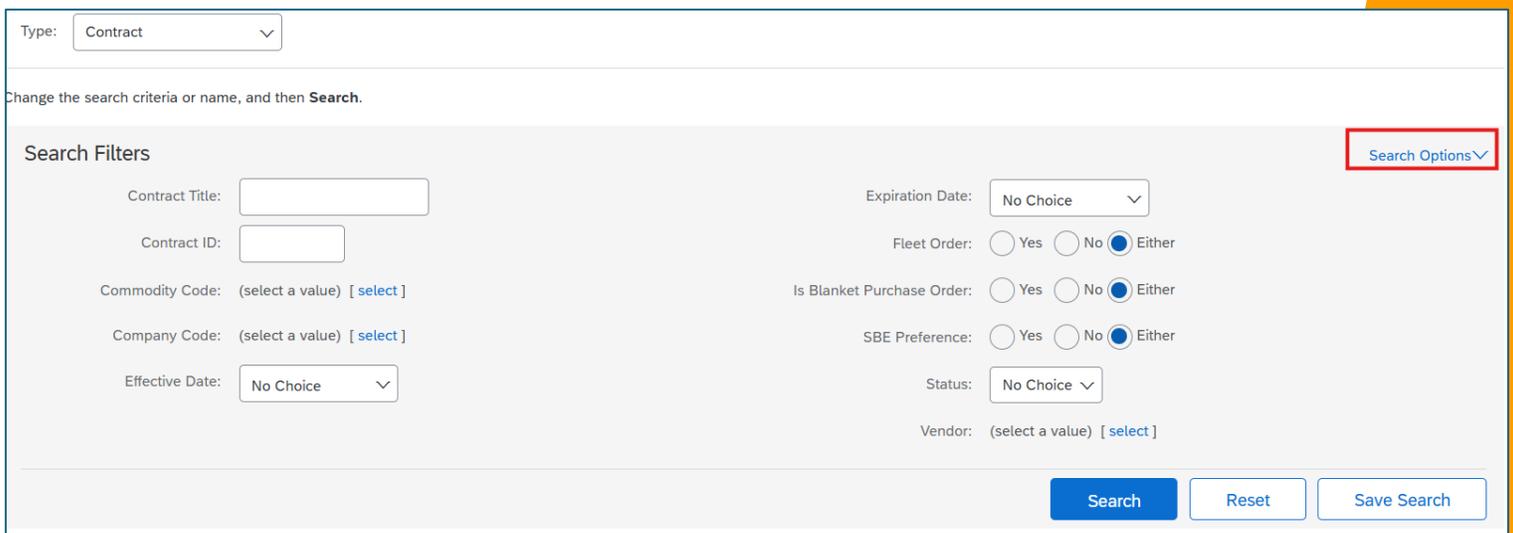
To search for Contracts, first click the **'Contract'** tab



The screenshot shows the top navigation bar of the LAUSD UNIFIED system. The logo is in the top left. The navigation menu includes 'HOME', 'CONTRACTS', 'PROCUREMENT', 'GUIDED BUYING', and 'MORE...'. The 'CONTRACTS' tab is highlighted with a red box. Below the navigation bar is a search bar with fields for 'Requisition', 'Title', and 'ID', and a search button with a magnifying glass icon.

55

Use the available filters to define your search, or click **'Search Options'** to add additional filter options.



The screenshot shows the search filters section of the system. At the top, there is a 'Type:' dropdown menu set to 'Contract'. Below this is a prompt: 'Change the search criteria or name, and then Search.' The 'Search Filters' section contains several input fields and radio buttons: 'Contract Title', 'Contract ID', 'Commodity Code' (with a '[select]' link), 'Company Code' (with a '[select]' link), 'Effective Date' (dropdown menu), 'Expiration Date' (dropdown menu), 'Fleet Order' (radio buttons for Yes, No, and Either), 'Is Blanket Purchase Order' (radio buttons for Yes, No, and Either), 'SBE Preference' (radio buttons for Yes, No, and Either), 'Status' (dropdown menu), and 'Vendor' (with a '[select]' link). A 'Search Options' link is highlighted with a red box in the top right corner. At the bottom right, there are three buttons: 'Search', 'Reset', and 'Save Search'.

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If this is a search you will use regularly, you can 'Save Search'. Add your search filters and then click '**Save Search**'.

In this example, we're searching for Open Contracts with an identified SBE Preference.

Change the search criteria or name, and then Search.

Search Filters

Contract Title:

Contract ID:

Commodity Code: (select a value) [select]

Company Code: (select a value) [select]

Effective Date: No Choice ▾

Expiration Date: No Choice ▾

Fleet Order: Yes No Either

Is Blanket Purchase Order: Yes No Either

SBE Preference: Yes No Either

Status: Open ▾

Vendor: (select a value) [select]

Search Options ▾

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The next time you click the magnifying glass to search, your saved search will be available to select and display results.

Search

Type:

Purchase Order

▼ My Labels
No Items

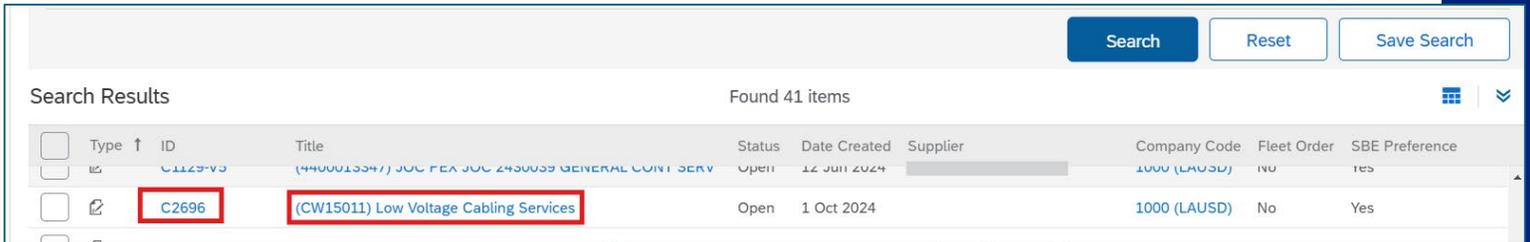
▼ My Saved Searches
Active SBE Contracts

▼ Public Saved Searches
No Items

Search

58

To open an individual contract, click on the **'ID'** or **'Title'** in blue.

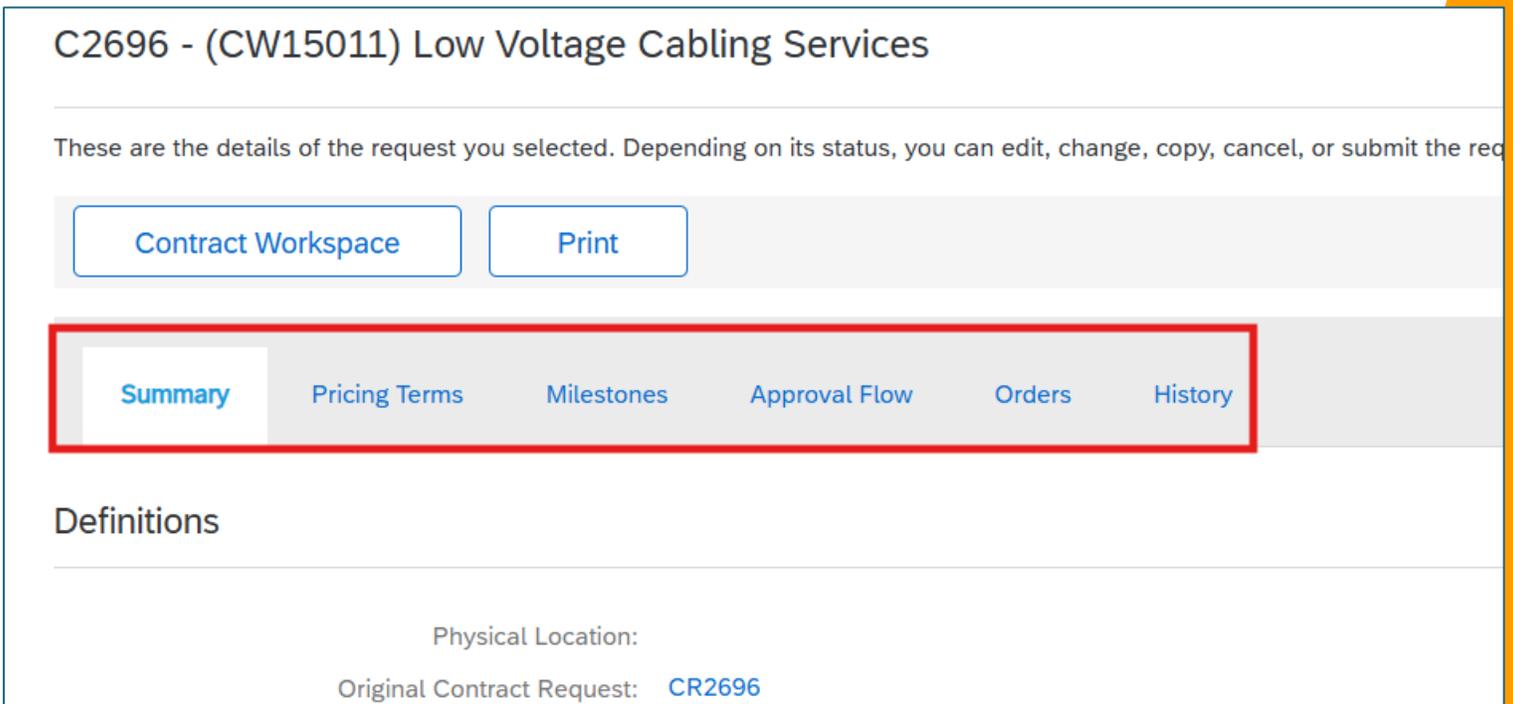


Search Results Found 41 items

Type	ID	Title	Status	Date Created	Supplier	Company Code	Fleet Order	SBE Preference
	C1129-V3	(4400013347) JOC FEA JOC 2430059 GENERAL CONT SERV	Open	12 Jul 2024		1000 (LAUSD)	No	Yes
	C2696	(CW15011) Low Voltage Cabling Services	Open	1 Oct 2024		1000 (LAUSD)	No	Yes

59

Review the contract details by selecting from the top tabs and scrolling down through the information provided.



C2696 - (CW15011) Low Voltage Cabling Services

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request.

[Contract Workspace](#) [Print](#)

[Summary](#) [Pricing Terms](#) [Milestones](#) [Approval Flow](#) [Orders](#) [History](#)

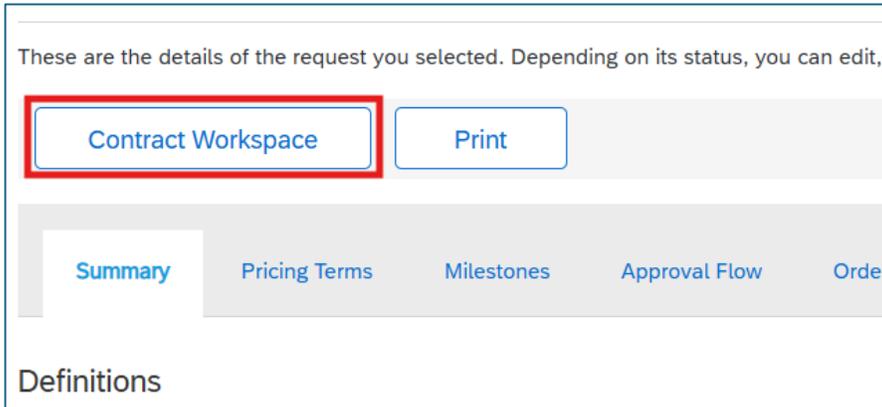
Definitions

Physical Location:

Original Contract Request: [CR2696](#)

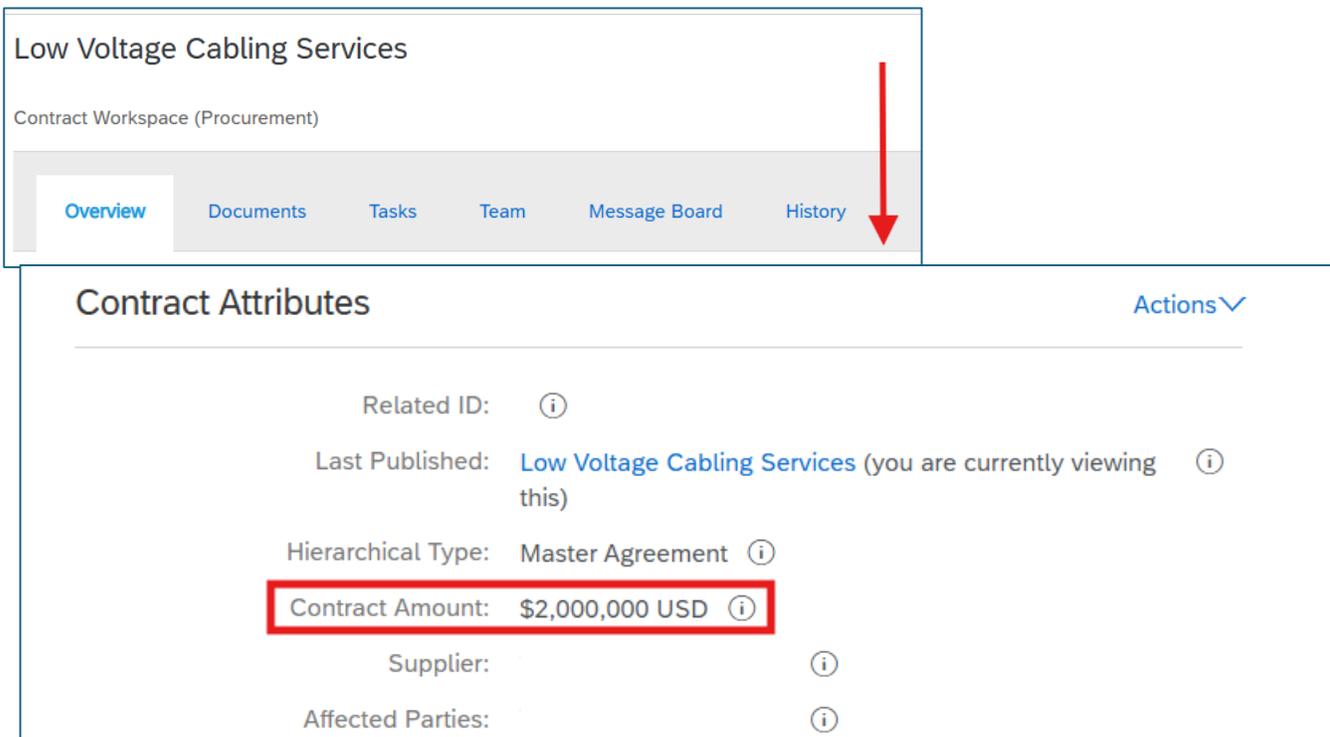
60

To review the attachments included in the contract documents, the total value of the agreement, and amount utilized, first click **'Contract Workspace'**.



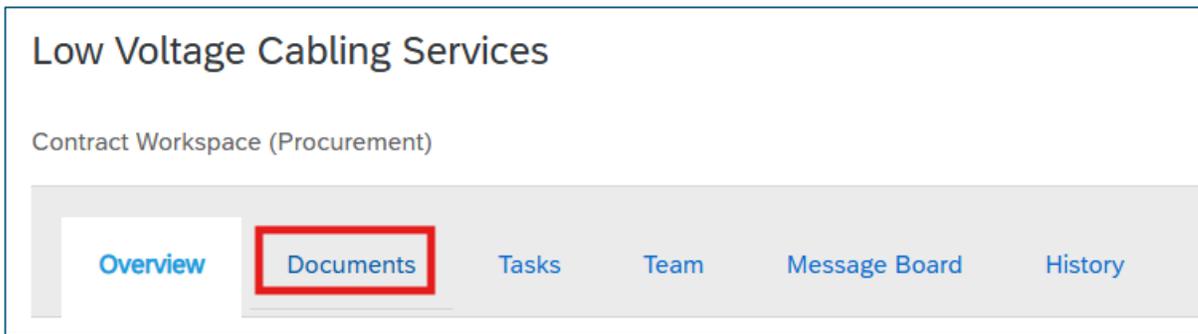
61

Scroll down to review the initial terms and contract value for the agreement, under **'Contract Attributes'**.



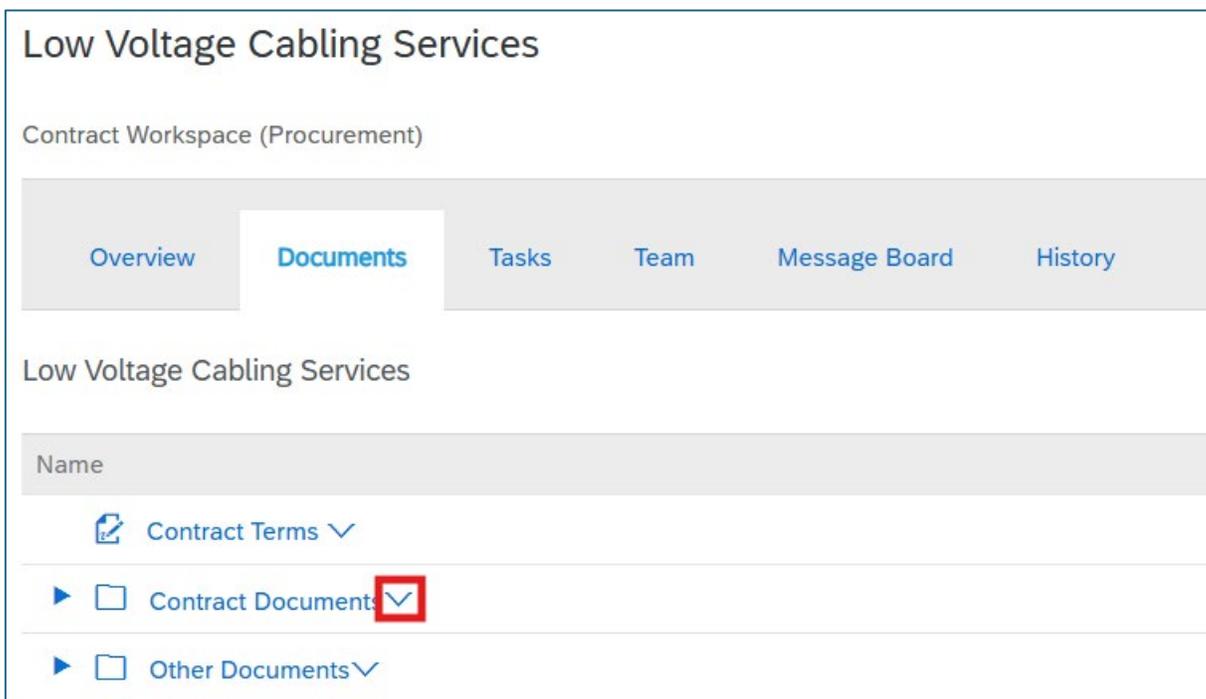
62

To review the attachments included in the contract documents, first select the **'Documents'** tab.



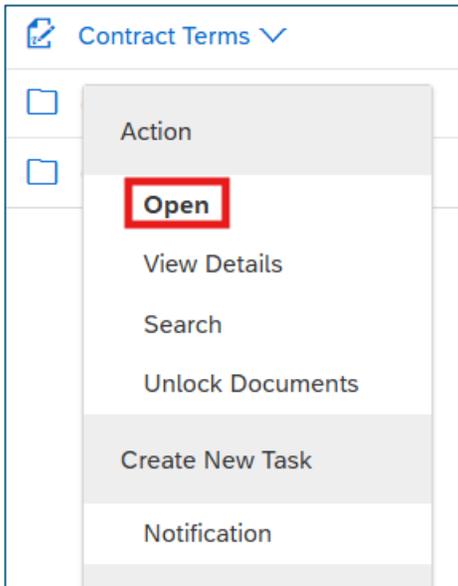
63

Click the dropdown arrow next to **'Contract Documents'**



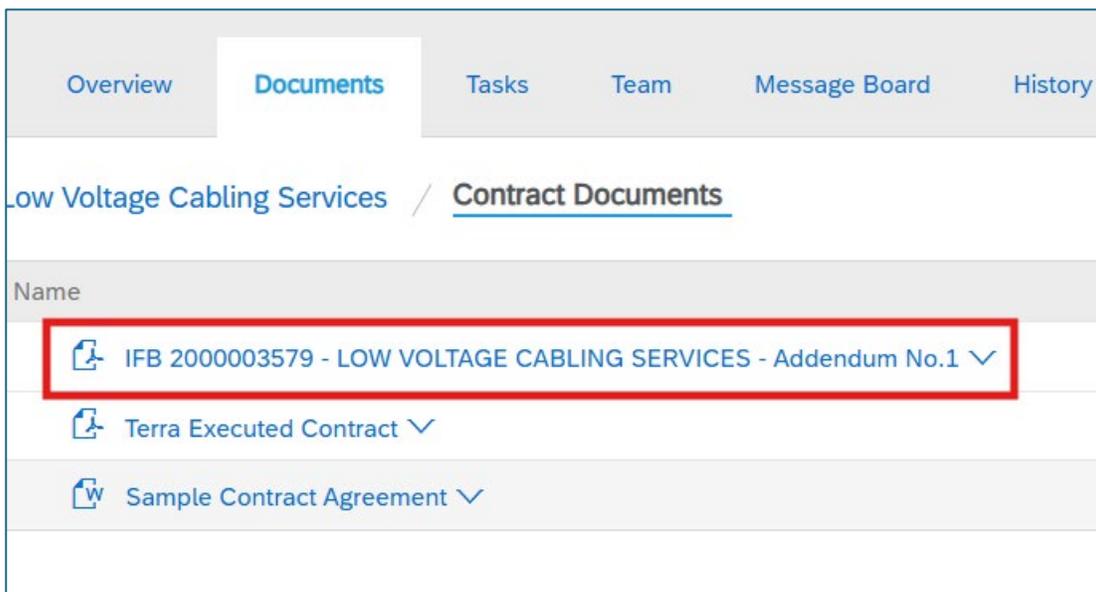
64

From the menu that opens, click '**Open**'.



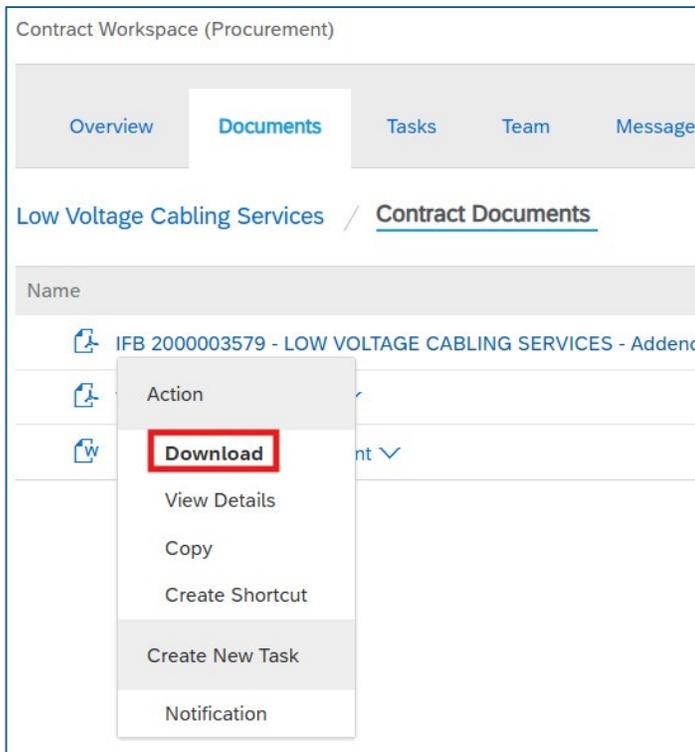
65

Click the document title you would like to open.



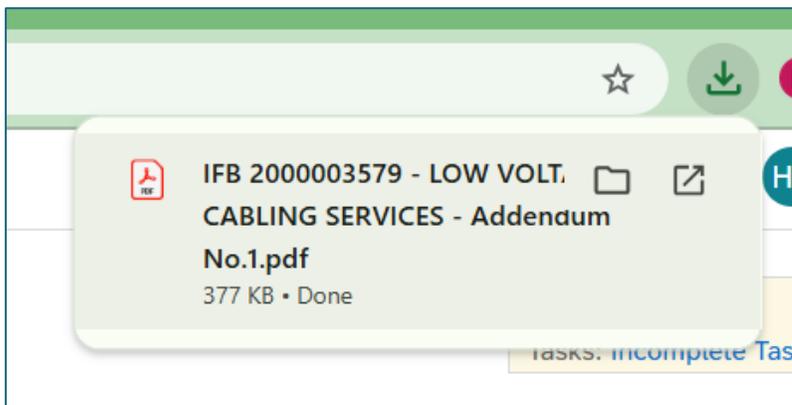
66

From the menu that opens, click '**Download**'.



67

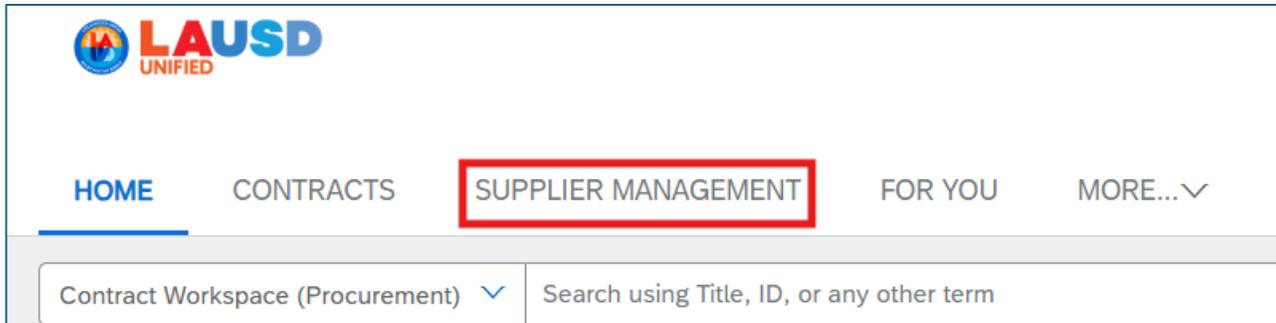
Open the document from your browser's downloads.



Search for Suppliers

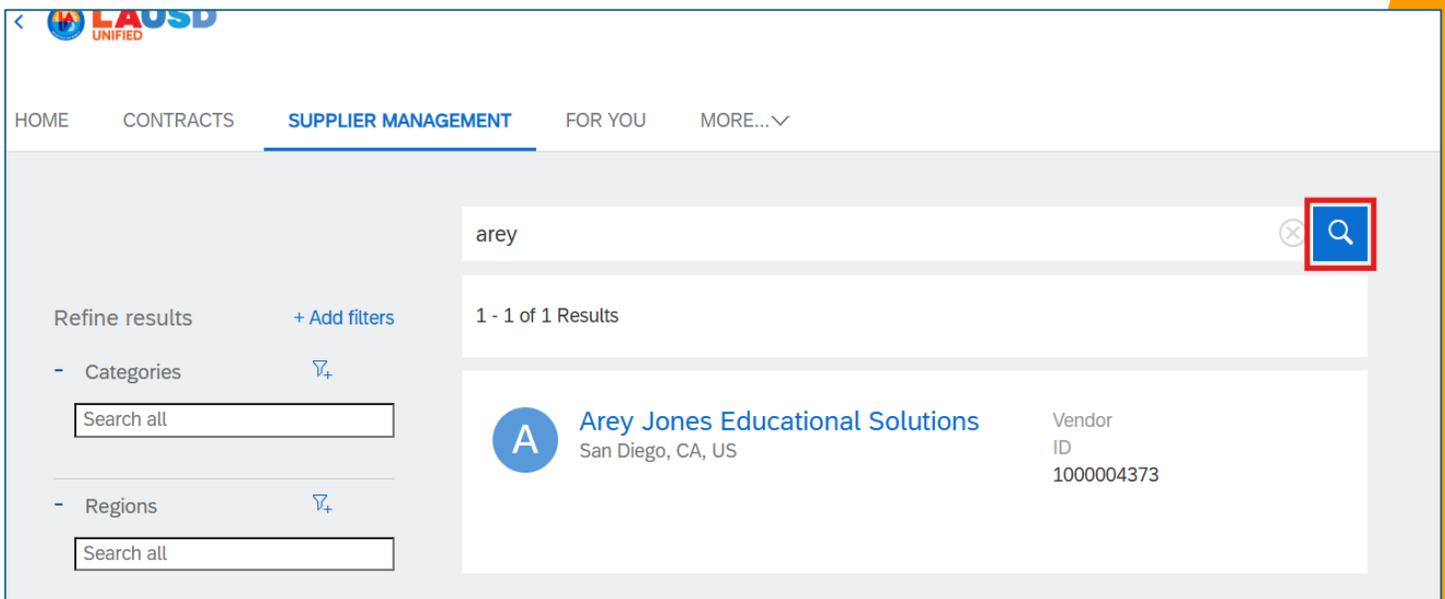
68

To search for Suppliers, first click the **'Supplier Management'** tab



69

Enter the Supplier name or vendor ID into the search field and then click the magnifying glass to the search field.



70

You may also search using the filters on the left. You can add more by clicking **'+Add filters'**

Refine results **+ Add filters**

- Process status
Approved (Legacy)
- Categories
- Regions
- Registration status

71

In this example, we've filtered by 'Small Business Enterprise Certificate'. Click the Vendor name to open and view their profile. You may also save your search, or export the results.

Search

Filters (1) : Certificates: Small Business Enterprise Certificate Clear all

1 - 10 of 145 Results Save search Export

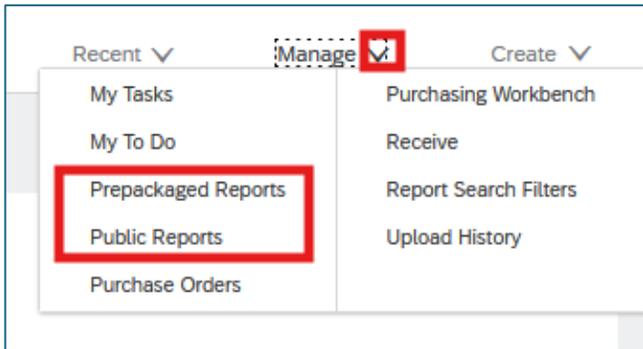
Cadence Leasing, Inc.
Torrance, California, US

Vendor ID
1000026594

Reporting

72

Reporting can be accessed from the **'Manage'** dropdown on the home page.



73

Please review the reporting training materials on Procurement's Ariba Webpage for detailed steps on utilizing reporting features in Ariba.

PSD Ariba Webpage:

<https://www.lausd.org/Page/19812>