

CUSTOMIZING SEARCH TILES ON THE PORTAL WORKBENCH

This guide will explain how to customize the search tiles on your Ariba workbench.

CUSTOMIZING SEARCH TILES ON THE PORTAL WORKBENCH

You can add tiles with custom saved searches for documents such as orders, invoices, payments, and more.

Order			
New orders ③	+	Changed orders ③	
Orders 💿	+	Items to confirm ③	
Invoice			
Invoices (2)	+	Rejected invoices 💿	
Overdue invoices - Approv	0 +	Invoices pending approval 💿	
Paid invoices ③	+ Ø	Draft invoices ③	
Payment			
Remittances ⑦	+	Scheduled payments (2)	
Other			
Service sheets ⑦		Pinned documents (7)	

The searches can filter specific customers, statuses, timeframes, and other fields.

You can update the default filters on the default tiles by clicking Edit Filter, selecting the filters, and selecting 'Apply'.

Customers		Order numbers	Creation date		Order status
Select or type selections	G	Type selection	Last 31 days	~	Include \lor Select or type sel
Company codes		Purchasing organizations	Customer locations		Order type
		Purchasing organizations			Order type
Company codes Select or type selections	C	Purchasing organizations	Customer locations Type selection		All
Company codes Select or type selections	C				
	C				All



You can add additional detail columns to the search results by clicking on the setting button and dragging the columns from the available to displayed section.

								Setting
					Resen	d Failed Orders	<u>e</u>	Sec. 1
Order Number 1	Customer	Amount	Date	Order	Status A	mount Invoiced	Pin	Actions
PO500671	PNC Bank - TEST	\$1000000 USD	Feb 1, 2023	Chang	ed		*	
able setting								>
ble columns	Use drag ar	nd drop to conf	igure the tab	le columns	to be displa	yed and thei	r order	
olumn grouping	Available colu			· ·	Displayed col			
ate and time	Туре				Order Nu	nber		-
	Version		-		Customer			-
	Inquiries		-	3	Amount			-
	Ship To A	ddress	-	\rightarrow	Date			-
	Ordering a	Address	-	<u> </u>	Order Sta	tus		-
	Routing S	tatus	-		Amount Ir	nvoiced		-
	External [Document Type			Pin			-
	4				<			×

If the results are satisfactory, Click Save Filter and create a tile/filter name.





Save filter	×
Before you save this filter, we recommend that you ad description for easy identification.	ld a
8	
Orders	
PNC POs - 365 Days	
	Cancel

To add additional tiles, click on the Customize link in the top right.

me Enablement O	Opportunities ~	Workbench	Orders ~	Fulfillment ~	Invoices ~	Payments ~	Catalogs	Reports ~ I	√lore ∼	_	Create 🗸 🕴 👓
Workbench											နံ့ရှိ Customize
4		8		299		0		1		0	
Pinned documents		Orders		Orders		Orders		Invoices		Draft invoices	Overdu
	PNC	POs - 365 Days		2021 POs		Save filter		Save filter		Last 50 days	

You can add, delete, re-arrange tiles (using drag and drop) from this page.

Customize Work					Apply Cancel
You can add, delete, re-arrange tiles	(using drag and drop) and set filters	on your workbench.			< ^h
_ ×	_ ×	- ×	- X	× ×	— × ~
4	(#)	299	0	1	0
Pinned documents	Orders	Orders	Orders	Invoices	Draft invoices
	PNC POs - 365 Days	2021 POs	Last 31 days	Last 31 days	Last 50 days
Overdue invoices - Not approved Overdue	+				



Click on the plus icon and select the tile type that you want to add to your workbench. Click on the Question Mark Icon to see an expanded definition of the tile type

elect a tile 🛛 😵 Tiles already so	elected				
New orders ③	+	Changed orders ⑦	+	Orders to invoice ⑦	+
Orders ③	+	Items to confirm ③	+	Items to ship	+
nvoice					
Invoices ⑦	+	Rejected invoices		Overdue invoices - Not ap ③	+
Overdue invoices - Approv ⑦	+	The Rejected invoices tile contains invoices w The Rejected invoices list view displays inform customer, invoice number, reference document	ith the status Rejected. nation such as	Approved invoices pendin ⑦	+
Paid invoices ③	+	On the Workbench, depending on your custon you can view, edit, and resubmit these invoices	ner's transaction rules,	Credit Memos ⑦	+

Create a name for the tile and click apply.





A useful feature for organizations that needs to reference the same document repeatedly is the ability to Pin documents. You will need to have the Pin column added to your search results and the Pinned Documents tile added to your workbench.

Workbench						ဂိုရှိ C	ustomize
4	8	299	0	1	0		(
Pinned documents	Orders PNC POs - 365 Days	Orders 2021 POs	Orders Save filter	Invoices Save filter	Draft invoices Last 50 days		Overdu a
Orders (8) ✓ Edit filter Save filter	PNC Bank - TEST Last 365 de	ays All orders			Q		
Customers	Order numb	iers	Creation date	Order status			
PNC Bank - TEST ×	Select or typ 🕑 Type select	tion	Last 365 days	√ Include	✓ Select or type sel □		
Show more						Apply	Rocat
Show more					Resend Failed Orders	Apply	Reset
	Customer	Amount	Date	Order Status	Resend Failed Orders Amount Invoiced		
Order Number 1	Customer PNC Bank - TEST	Amount \$1000000 USD	Date Feb 1, 2023	Order Status Changed		@	696
Order Number 1						Pin	¢۲۵ Actions
Order Number 个 PO500671 PO500820	PNC Bank - TEST	\$1000000 USD	Feb 1, 2023	Changed		Pin	ሪየሪ Actions
Show more Order Number ↑ PO500671 PO500820 PO500828 PO500829	PNC Bank - TEST PNC Bank - TEST	\$1000000 USD \$400000 USD	Feb 1, 2023 Oct 5, 2022	Changed New	Amount Invoiced	Pin * %	<u>لاوہ</u> Actions
Order Number 个 PO500671 PO500820 PO500828	PNC Bank - TEST PNC Bank - TEST PNC Bank - TEST	\$1000000 USD \$400000 USD €1000 EUR	Feb 1, 2023 Oct 5, 2022 Nov 30, 2022	Changed New Invoiced	Amount Involced	Pin	۵۹۵ Actions
Dorder Number ↑ PO500671 PO500820 PO500828 PO500829 PO500830	PNC Bank - TEST PNC Bank - TEST PNC Bank - TEST PNC Bank - TEST	\$1000000 USD \$400000 USD €1000 EUR \$1631.89 CAD	Feb 1, 2023 Oct 5, 2022 Nov 30, 2022 Nov 30, 2022	Changed New Invoiced Invoiced	Amount Invoiced	Pin	۸۹۵ Actions
Order Number ↑ P0500820 P0500828 P0500829	PNC Bank - TEST PNC Bank - TEST PNC Bank - TEST PNC Bank - TEST PNC Bank - TEST	\$1000000 USD \$400000 USD €1000 EUR \$1631.89 CAD £1000 GBP	Feb 1, 2023 Oct 5, 2022 Nov 30, 2022 Nov 30, 2022 Nov 30, 2022	Changed New Invoiced Invoiced Invoiced	Amount Invoiced €1000 EUR \$1531.89 CAD £1000 GBP	Pin	۵۹۵ Actions

As you pin a document from the search results, it will appear in the pinned documents tile where you can quickly reference it for future use. This is helpful if your organization needs to submit multiple invoices against a PO or copy and submit repeat invoices.