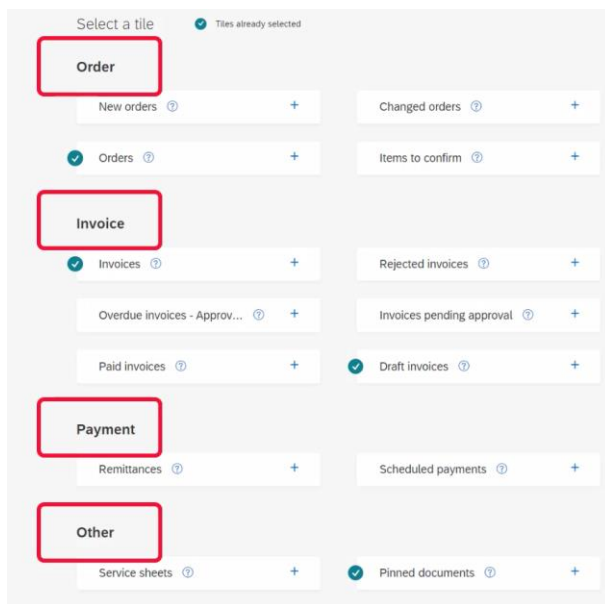


CUSTOMIZING SEARCH TILES ON THE PORTAL WORKBENCH

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

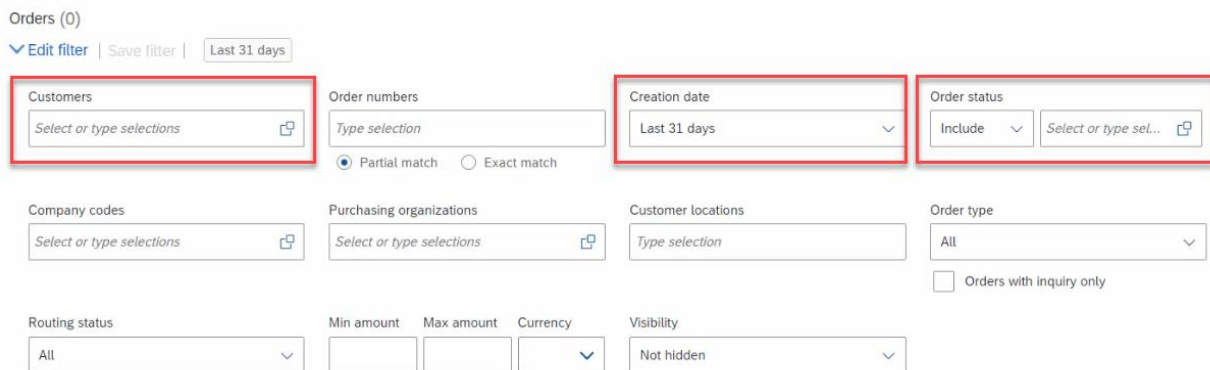
CUSTOMIZING SEARCH TILES ON THE PORTAL WORKBENCH

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



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'.



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.

Table with 8 columns: Order Number, Customer, Amount, Date, Order Status, Amount Invoiced, Pin, Actions. A red box highlights the 'Settings' icon in the Actions column.

Order Number ↑	Customer	Amount	Date	Order Status	Amount Invoiced	Pin	Actions
PO500671	PNC Bank - TEST	\$1000000 USD	Feb 1, 2023	Changed			⋮

Table setting dialog box with two columns: Available columns and Displayed columns. A red box highlights the Available columns list, and a green box highlights the Displayed columns list. A mouse cursor is shown dragging a column from the available list to the displayed list.

Use **drag and drop** to configure the table columns to be displayed and their order

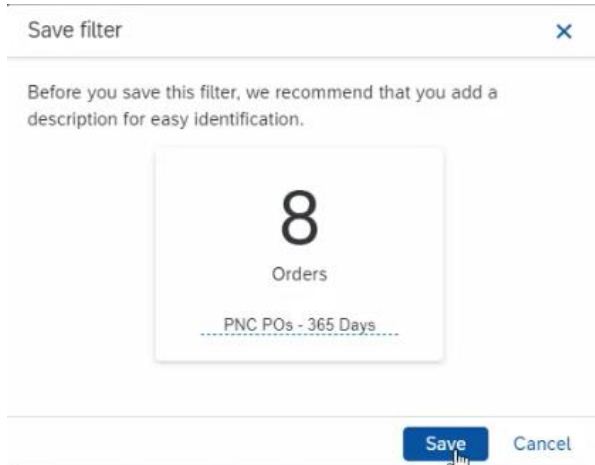
Available columns	Displayed columns
Type	Order Number
Version	Customer
Inquiries	Amount
Ship To Address	Date
Ordering Address	Order Status
Routing Status	Amount Invoiced
External Document Type	Pin

Buttons: Save, Cancel

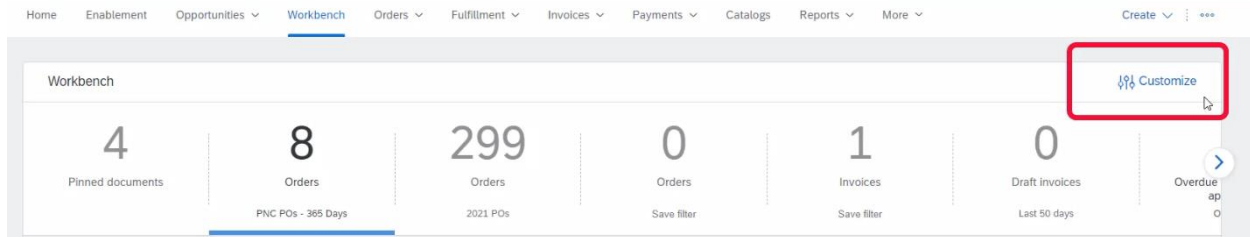
If the results are satisfactory, Click Save Filter and create a tile/filter name.

Orders (8) filter bar with buttons: Edit filter, Save filter, PNC Bank - TEST, Last 365 days, All orders. The 'Save filter' button is highlighted with a red box.

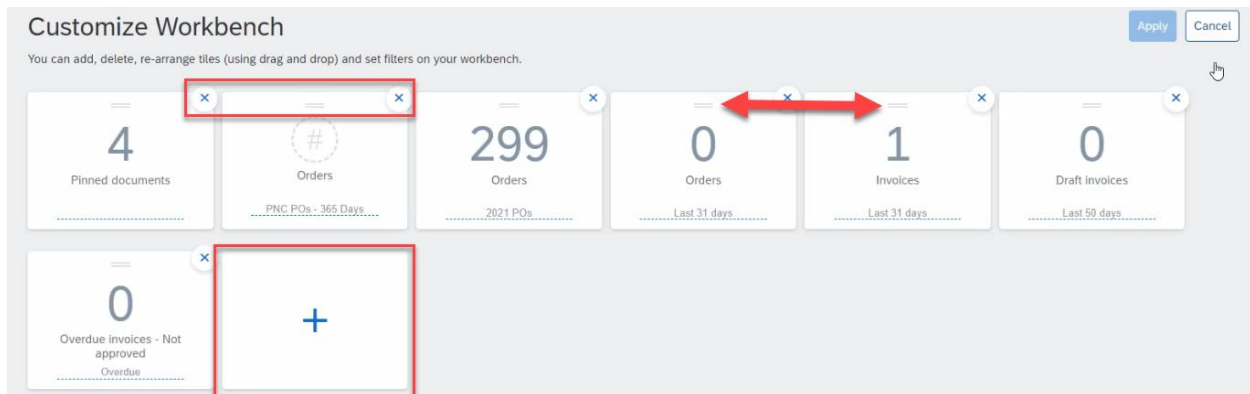
Orders (8)
▼ Edit filter **Save filter** PNC Bank - TEST Last 365 days All orders



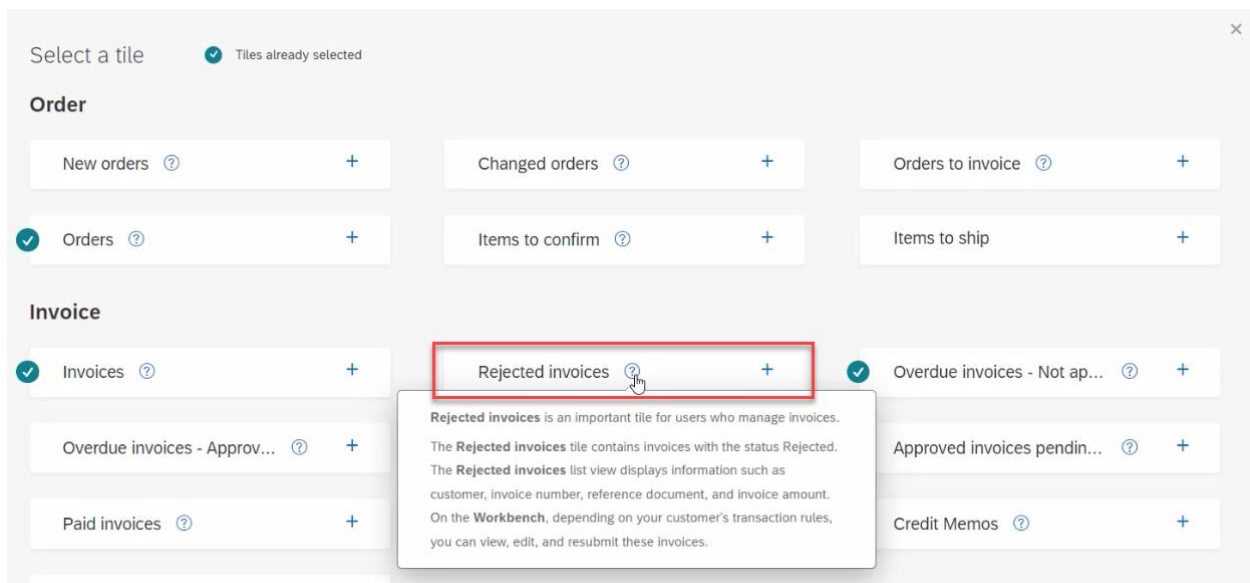
To add additional tiles, click on the Customize link in the top right.



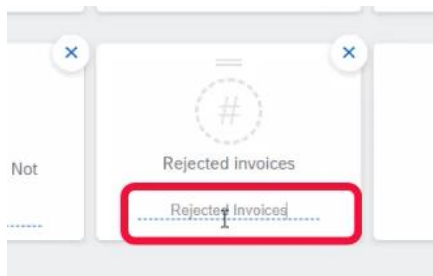
You can add, delete, re-arrange tiles (using drag and drop) from this page.



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

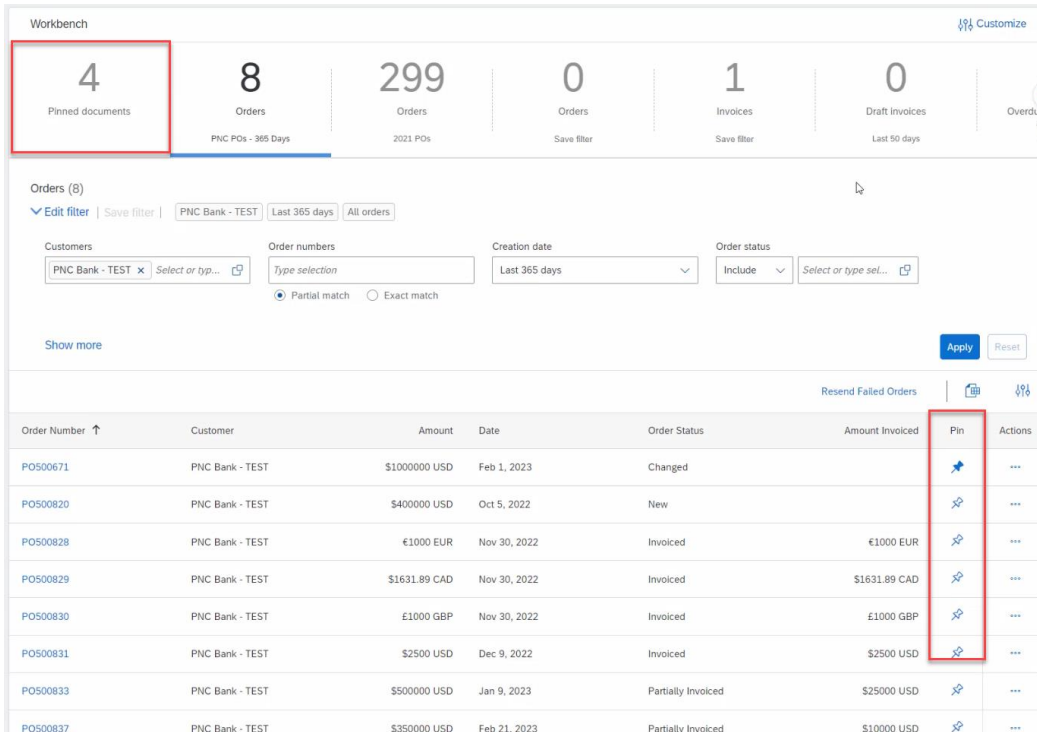


Create a name for the tile and click apply.



PINNING DOCUMENTS FOR QUICK ACCESS

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.



The screenshot shows the Workbench interface. At the top, there are several summary tiles: 'Pinned documents' (4), 'Orders' (8), 'Orders' (299), 'Orders' (0), 'Invoices' (1), and 'Draft Invoices' (0). Below these is a section for 'Orders (8)' with various filters and search options. At the bottom, there is a table of search results with columns: Order Number, Customer, Amount, Date, Order Status, Amount Invoiced, Pin, and Actions. The 'Pin' column is highlighted with a red box, and a red box also highlights the 'Pinned documents' tile at the top left.

Order Number ↑	Customer	Amount	Date	Order Status	Amount Invoiced	Pin	Actions
PO500671	PNC Bank - TEST	\$1000000 USD	Feb 1, 2023	Changed		★	...
PO500820	PNC Bank - TEST	\$400000 USD	Oct 5, 2022	New		★	...
PO500828	PNC Bank - TEST	€1000 EUR	Nov 30, 2022	Invoiced	€1000 EUR	★	...
PO500829	PNC Bank - TEST	\$1631.89 CAD	Nov 30, 2022	Invoiced	\$1631.89 CAD	★	...
PO500830	PNC Bank - TEST	£1000 GBP	Nov 30, 2022	Invoiced	£1000 GBP	★	...
PO500831	PNC Bank - TEST	\$2500 USD	Dec 9, 2022	Invoiced	\$2500 USD	★	...
PO500833	PNC Bank - TEST	\$500000 USD	Jan 9, 2023	Partially Invoiced	\$25000 USD	★	...
PO500837	PNC Bank - TEST	\$350000 USD	Feb 21, 2023	Partially Invoiced	\$10000 USD	★	...

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.