



GENERAL FUNCTIONALITY **SUPPLIER GUIDE**

Honeywell

SAP

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INTRODUCTION

INTRODUCTION

- The General Functionality is a **generic guide** that provides information about Ariba (SAP Business Network) including how to navigate, setup, edit and access the information that you require
- All screenshots and **examples** contained within Ariba process guides are taken from various Buyers test Ariba Network accounts. All documents and the content within the documents are fabrications and in no way reflect any past, current or future documents and any similarities are pure coincidence.
- Your System Administrator can assist with permissions and login on details
- Permissions allow access to specific sections of the Ariba Network, if there is a section that you require, contact your system Administrator, refer to Identifying and Contacting your System Administrator
- The **Supplier Information Portal (SIP)** can be accessed via the Help Centre, a direct link or via Customer Relationships, refer to Accessing the Supplier Information Portal
- The transaction **workbench** lets you create pre-set views based on how you work, and the customers you manage.
- Get to the documents you need faster than by sorting through individual orders or invoices.

LOGGING INTO THE SAP BUSINESS NETWORK

After logging in, the blue ribbon at the top of the screen will display **SAP Business Network**

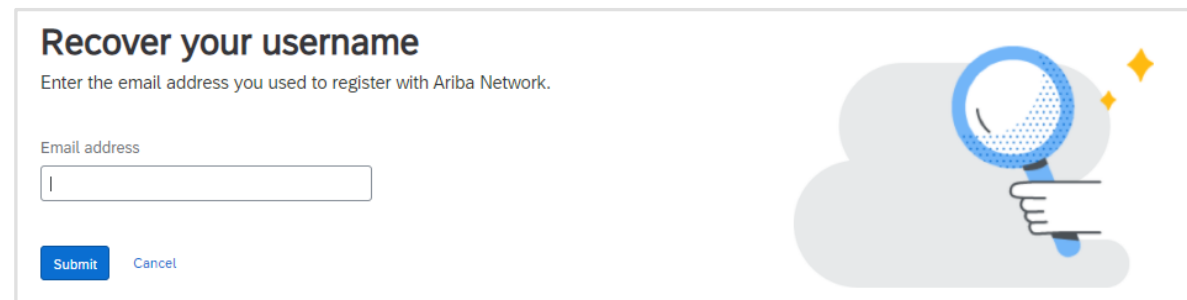
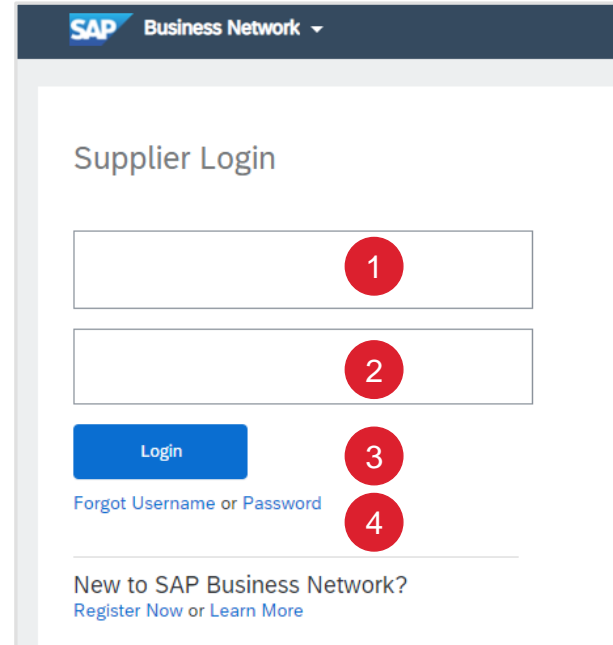
Go to <https://supplier.ariba.com>

To Login:

1. Enter **Username**
2. Enter your **Password**
3. Click on **Login**
4. If you have forgotten your User name or password, click on **Forgot Username or Password**

Forgot Username or Password

- a) Enter your **email OR username**
- b) Click **Submit**
- c) An email from Ariba Commerce Cloud will be sent to the registered email address



CONTACT THE SYSTEM ADMINISTRATOR

The System Administrator creates users, applies permissions and should be contacted when there is questions, updates or changes to your log in profile

Contact the Business System Administrator when:

- You need permissions to access a tab required for your role
- You need to have you password reset

How to contact the System Administrator?

1. Click on your user **Initials**
2. Select **Contact Administrator** from the drop down list (There are different options to contact the System Administrator, use the option wanted)
3. Click on **Done** to Return to the page you accessed the drop down list from

The image shows two parts of a user interface. On the left is a vertical user menu with a dark blue header containing a question mark icon and 'BS' initials. The menu is divided into sections: 'User's Name', 'Users Login' (with options 'My Account', 'Link User IDs', and 'Contact Administrator'), 'Back to Classic View', 'Business Name' (with 'ANID: Business ANID number Premium Package'), 'Company Profile', 'Settings' with a right arrow, and 'Logout'. A red circle with the number '1' points to the header, and a red circle with the number '2' points to the 'Contact Administrator' option. On the right is the 'Contact Your Account Administrator' page. It has a light gray header with the title. Below is a text area explaining the role of the account administrator. Under the heading 'Account Administrator Information', there are fields for 'Name:', 'Email Address:', 'Office Phone:', and 'Fax:'. A red circle with the number '3' points to a blue 'Done' button in the bottom right corner.

ACCESSING “MY ACCOUNT”

Accessing “My Account” allows users to make updates to their SAP Business Network Account, for example, users will be able to update the following:

- A name change
- Business Role Change
- Changing your Password

This is how you can edit the information:

1. Click on your user **Initials**
2. Click on **My Account**
3. The **My Account** screen is displayed (your System Administrator has entered information while creating your account)
4. Update the required fields
5. Click on **Save**, a green ribbon indicates the changes have been saved successfully a red ribbon indicates that information is missing or incorrect

Note: All changes will trigger an email to confirm that you have requested the changes

The screenshot shows the 'My Account' interface in SAP Business Network. It is divided into two main sections: 'Account Information' and 'Preferences'. The 'Account Information' section contains fields for Username, Email Address, First Name, Middle Name, Last Name, and Business Role. The 'Preferences' section contains fields for Preferred Language, Preferred Timezone, and Default Currency. A 'Save' button is located in the top right corner. Red callouts 1 through 5 highlight the following elements:

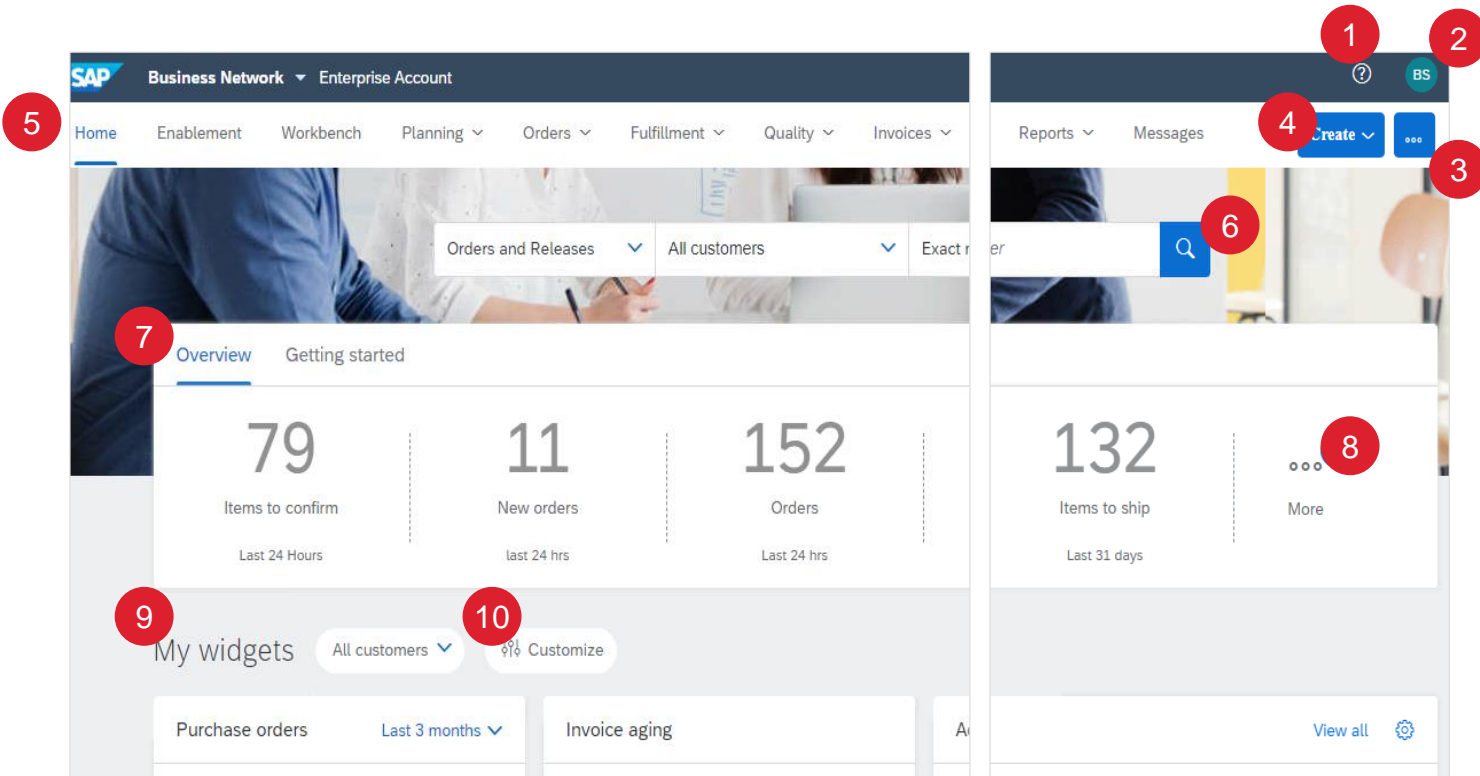
- 1. User's Initials (BS) in the top right corner.
- 2. 'My Account' link in the left sidebar menu.
- 3. 'My Account' title in the top header.
- 4. 'Account Information' section header.
- 5. 'Save' button in the top right corner.

DASHBOARD AND HOME PAGE

DASHBOARD AND HOME PAGE

SCREEN OVERVIEW

1. Access to **Help**
2. **User Name Initials:**
a drop down provides applicable accesses
3. **... (More)** – a drop down provides access to track, CSV upload and CSV download options-can also be accessed from other screens
4. **Create** – a drop down that provides short cuts to processes, can be accessed from other screen
5. **Accessible Tabs** – the tabs that you have permissions to access
6. **Quick search options** – Allows searching for selected parameters from the Seller Dashboard /Home page
7. **Overview Bar** – helps to focus on important tasks related to orders and Invoices
8. **More** – indicates there are more tiles
9. **My Widgets** – Allows users to change the identify what widget they want to see on the Seller Dashboard /Home page
10. **Customize** – Shows the available options for My Widgets



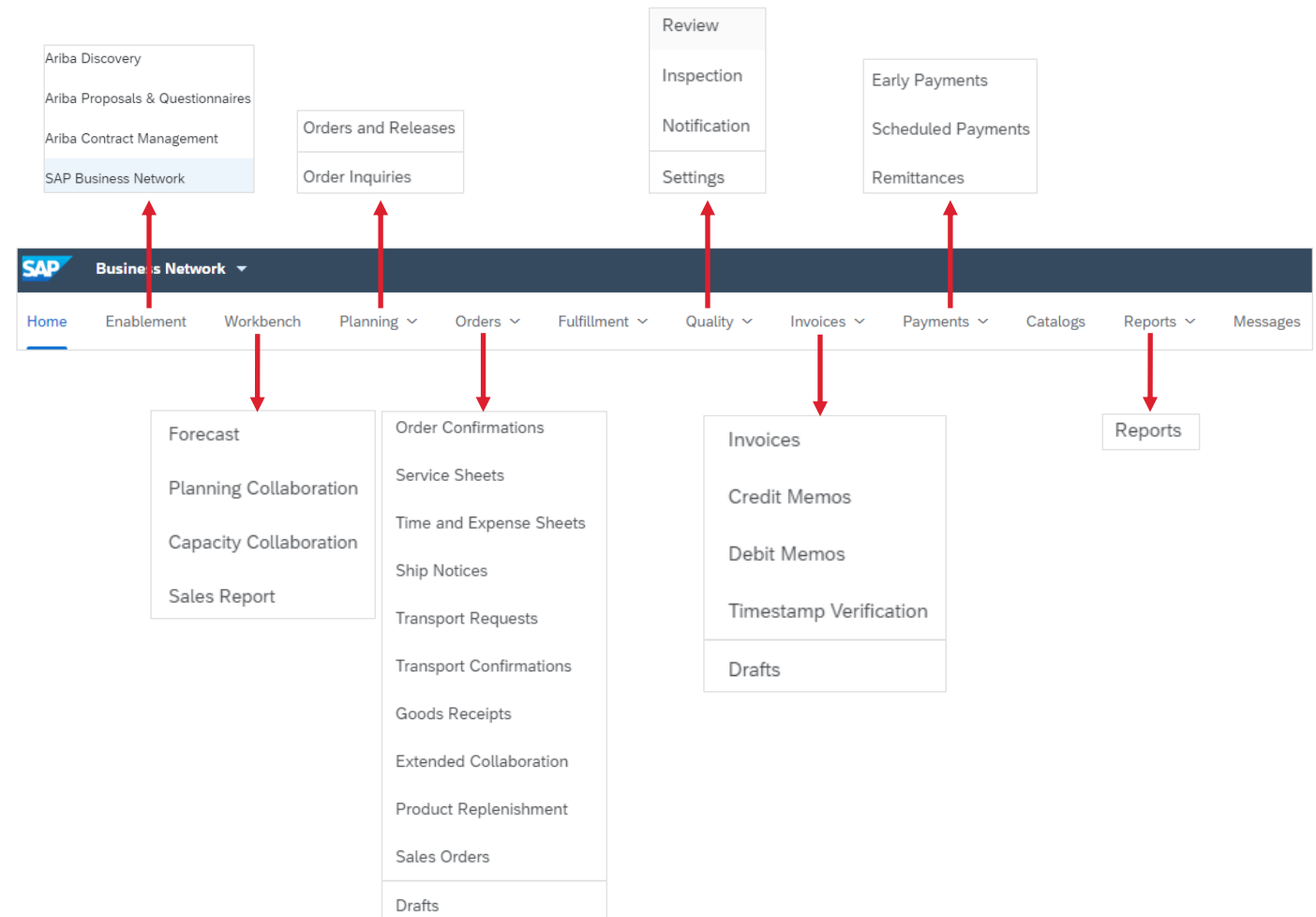
DASHBOARD AND HOME PAGE

SCREEN TABS

Only the tabs that your Businesses System Administrator has assigned to you will appear, contact your System Administrator if you require other tabs to access required processes

When working with tabs, remember:

- The Tabs that each User can see is based on the permissions assigned by your System Administrator and the required processes determined from Honeywell.
- Not all tabs have drop down lists
- Not all shown down list selections may be available
- Some functions can only be performed by the System Administrator
- The order of the tabs cannot be changed
- Refer to the Supplier Information Portal for your Buyer for more information about the processes required

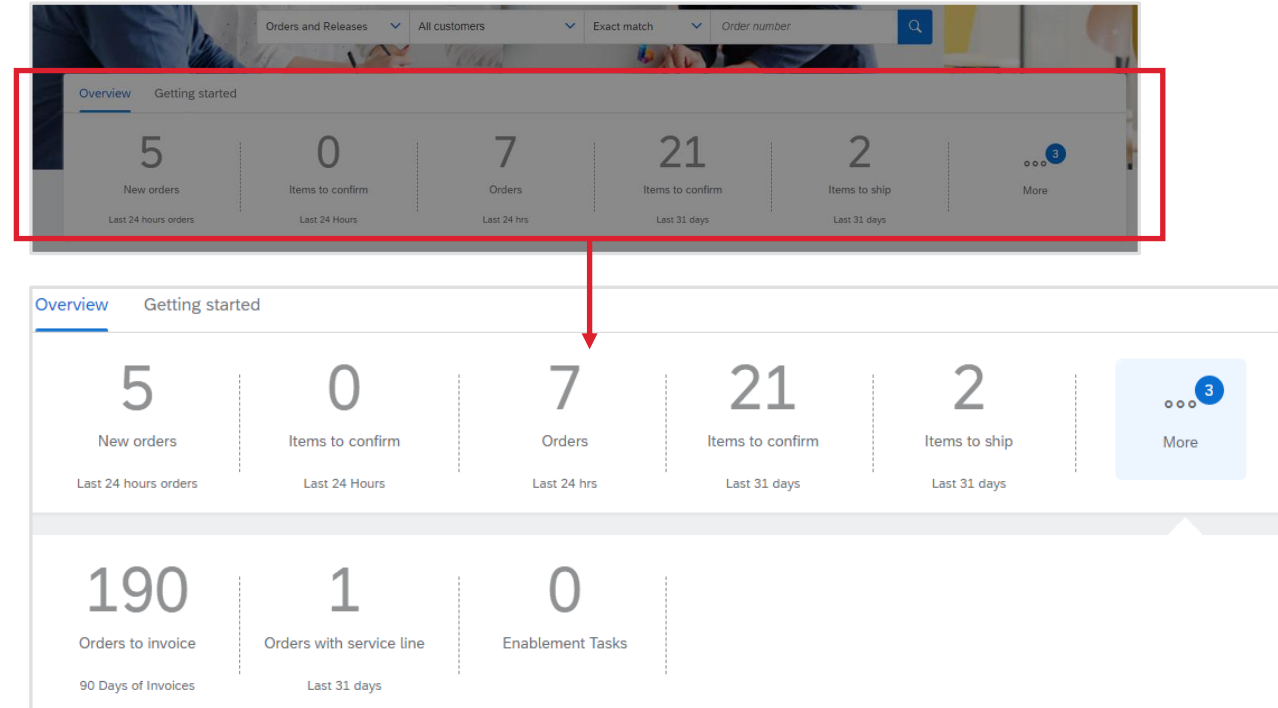


DASHBOARD AND HOME PAGE

TILE BAR OVERVIEW

The overview bar help suppliers focus on specific tasks related to orders and invoices, tiles can be customized, each tile takes the user to the Workbench

- The Overview tile bar can be personalized so that a user can keep track of order and/or invoices as part of their job
- Where there is a number in the “...” indicates that there are more tiles to display in Overview
- A number indicates that there are more tiles to view, click on More and the tiles will be displayed
- The time frames (hours & days) shown on the tiles can be changed based on the user's requirements
- You can access each tile by clicking on it
- The name of each tile can be adjusted to reflect the needs to the user
- Tiles can be added or removed
- Personalisation enables suppliers to prioritise and keep track or order and invoices



DASHBOARD AND HOME PAGE

MY WIDGETS

Widgets provides users the options to display information relevant to their function, it can show insights such as invoice aging, leads, purchase order volume and more can be selected. Use widgets to gain insights into Honeywell.

The **My Widgets** section can be customized by:

- Buyer
- Tile Type

All Items in Blue can be clicked on:

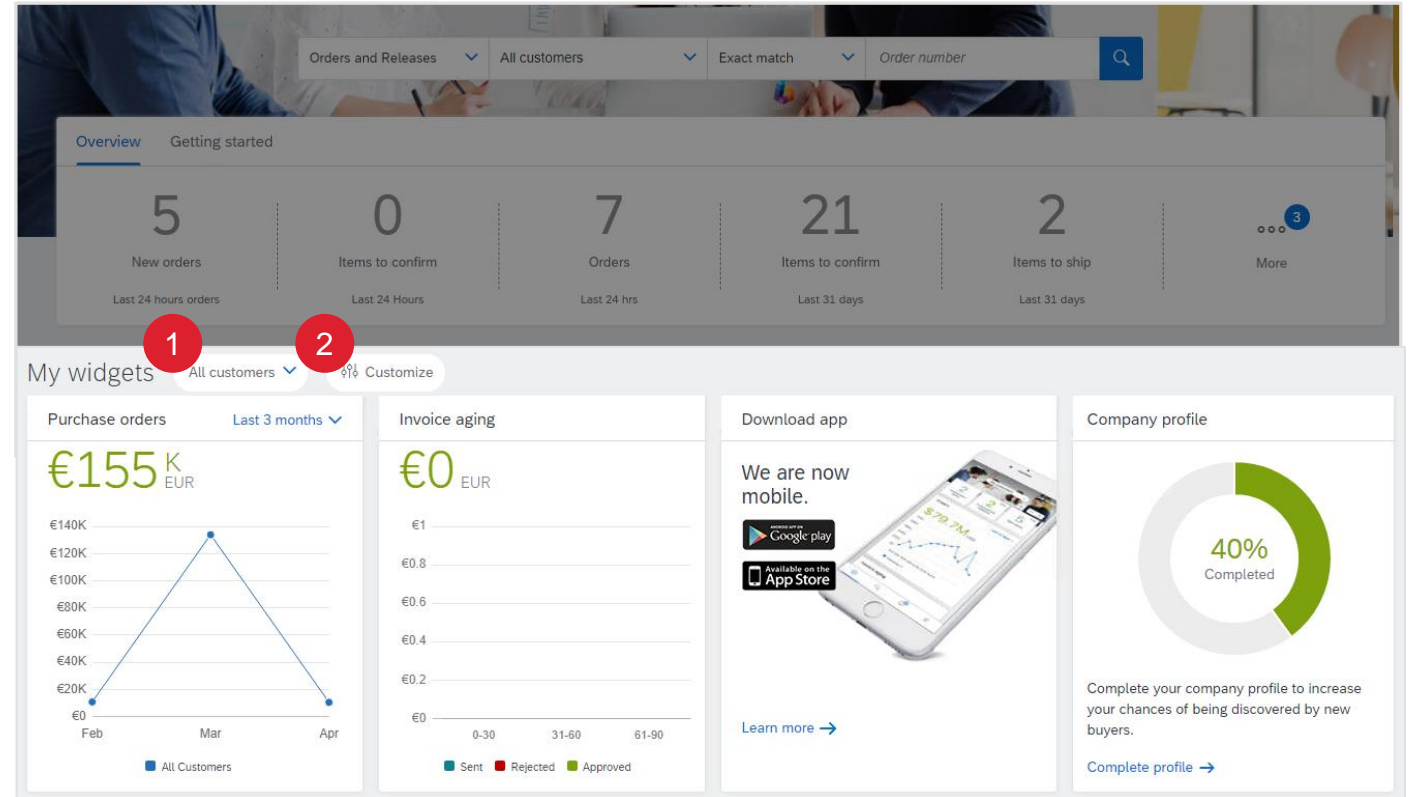
- Provide more information
- Change time frame of the information
- Update parts of the Ariba Network

To Display Customers that you work with:

1. Click on **All Customers** drop down and make your selection
2. Click on **Customize** and make your selection, refer to [Customize My Widgets](#)

Note:

- Not all widgets are the same size, some are larger.
- Some widgets provide bar graphs, pie graphs, line graphs or information only



DASHBOARD AND HOME PAGE

CUSTOMIZE MY WIDGETS – HOW TO ADD OR REMOVE TILES

Widgets can be customized to provide information on the Seller Dashboard/Home page

1. Click On **Customize**.
2. Select the widget(s) required from **Available widgets**
3. Click on **Save**. The widget is now added to the Seller Dashboard/ Home Page

The screenshot illustrates the 'Customize my widgets' interface. At the top, a 'My widgets' section shows currently active widgets: 'Purchase orders' (with a 'Last 3 months' filter) and 'Invoice aging'. A red circle with the number '1' highlights the 'Customize' button. Below this, the 'Customize my widgets' panel is shown, featuring a 'Save' button (highlighted with a red circle and number '3') and a 'Cancel' button. The panel displays a preview of the selected widgets: 'Purchase orders' (a line chart for Feb, Mar, Apr), 'Invoice aging' (a bar chart for 0-30, 31-60, 61-90 days), and 'Download app'. Below the preview, the 'Available widgets' section (highlighted with a red circle and number '2') lists various widgets that can be added, each with a plus icon: 'On-time payment rate', 'Feeds', 'Application gateway', 'Paid invoices', 'My leads', and 'Benchmarking: On-time Payment Rate'.

Note:

- Hover over the **Available widgets** name to display a Preview of the widget and what data it shows
- Clicking on **All Customers** and selecting a customer from the drop down list the information on the widget is displayed.
- Widgets cannot be customized by customer

DASHBOARD AND HOME PAGE

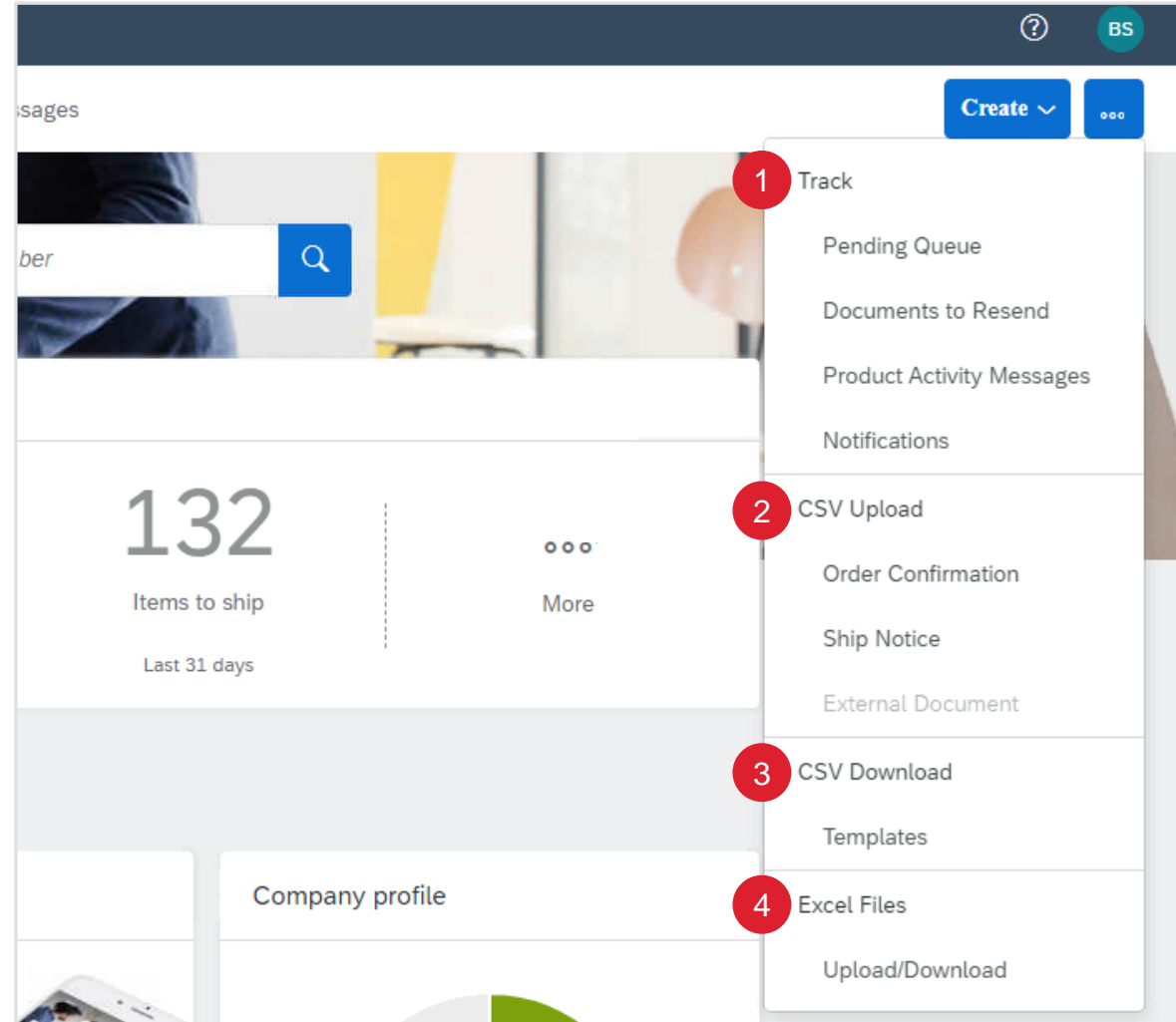
... (MORE) SELECTION OVERVIEW

The ... (**More**) selection provides a list of actions, be aware that not all actions are accepted Honeywell.

There are 4 separate options, they are:

1. **Track** – allows users to view documents that are in different statuses and opportunities to create, open and review documents displayed
2. **CSV Upload** – users upload CSV files they have created using the templates that the Buyer has uploaded for specific documents
3. **CSV Download** – provides the available templates for specific documents and the format they must be in
4. **Excel Files** – the upload download can be used to transact with Buyers using excel file format

Note: Any items that are greyed out are not available for selection and not all Buyers accept CSV files, confirm with your Buyer prior to using this process

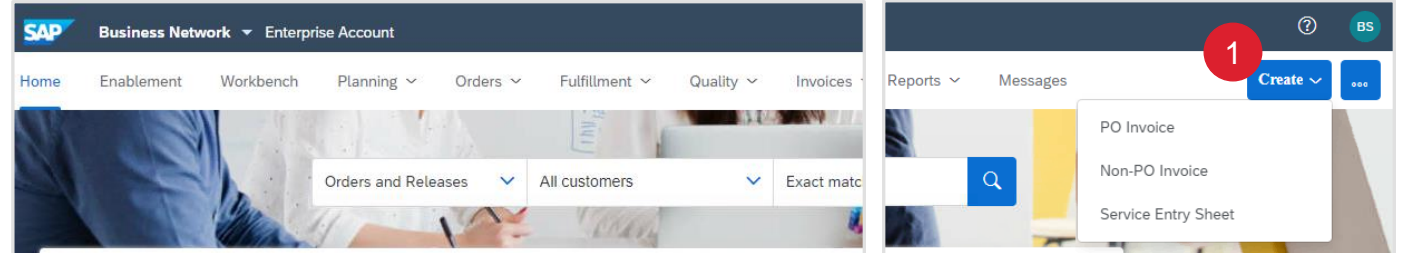


DASHBOARD AND HOME PAGE

CREATE SELECTION - OVERVIEW

The **Create** enables suppliers to create the available options from the Dashboard/Home page

1. Click on **Create** to display the drop down list



Note:

- The options available are based on the documents that are transacted with Honeywell, however, using this selection is general rather than specific to a document
- To create documents such as Order Confirmations, Ship Notices and Invoices refer to the applicable training documents on the Supplier Information Portal (SIP)

DASHBOARD AND HOME PAGE

SWITCHING FROM TRANSACTION ACCOUNTS TO SOURCING ACCOUNTS

Users can switch between the SAP Business Network transaction account and sourcing accounts such as Ariba Discovery and Ariba Contract Management

1. Click on the down arrow next to the name of the account you are in
2. Select the required account

Some selections have a pop-up message, select the appropriate response

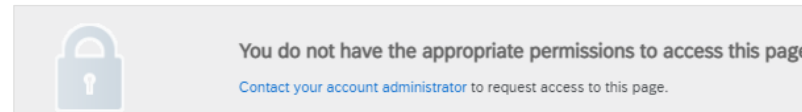
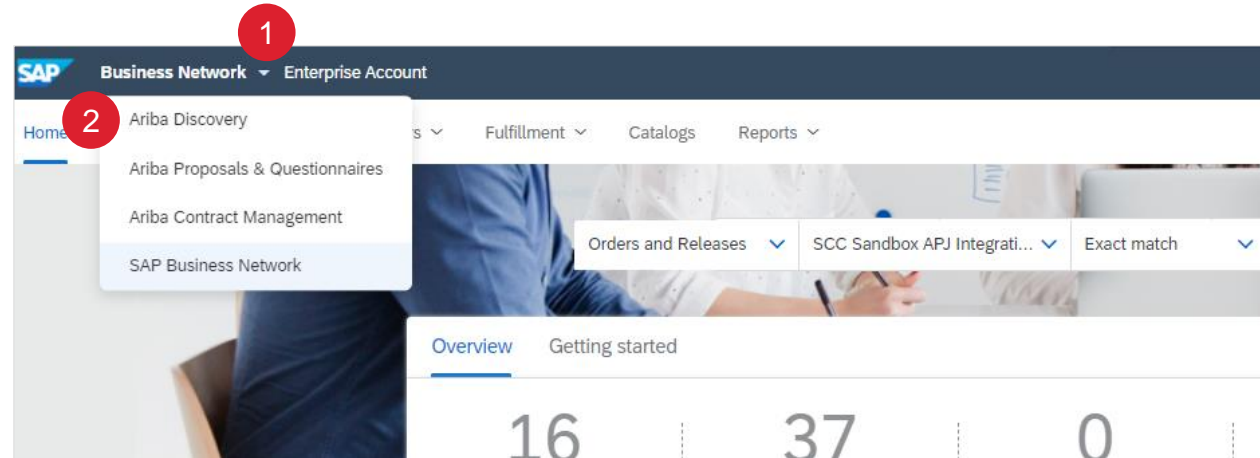
Ariba Discovery – Used for Request for Quote (RFQ) processes, access to global purchase ready buyers

Ariba Proposals & Questionnaires – Used for Sourcing, including responding to prospects

Ariba Contract Management

SAP Business Network

Note: An error message appears when users do not have the required permissions. If you require access, contact you Business Ariba Network System Administrator. Refer to [Contact the System Administrator](#)



HELP OPTIONS

HELP OPTIONS

There are a number of help options available to Suppliers, there are two types of help:

- **Generic Help** – that is general in nature about SAP Ariba
- **Buyer Specific** – that provides information specific to transacting with the Buyer

The options are:

- **Active Onscreen Help** – provides users with information on the screen, only available on the Seller Dashboard/Home page and Workbench
- **Help Topics Pane** – provides users with access to different types of help, the help provided in the pane is general in nature and can be a document, and FAQ or a video clip
- **Help Centre Home Page** – provides users with a query entry field to provide self help options and is the first tab
- **Guided Help** – takes users through possible options relating to their query
- **Documentation & Learning** – options and access to documentation and video clips
- **Contact Us** – users completing the Contact Us form will be directed to the help that best suits their query and the type of account they have
- **Supplier Information Portal (SIP)** – provides users with information that is specific for transacting with a Buyer using the Ariba Network

HELP OPTIONS

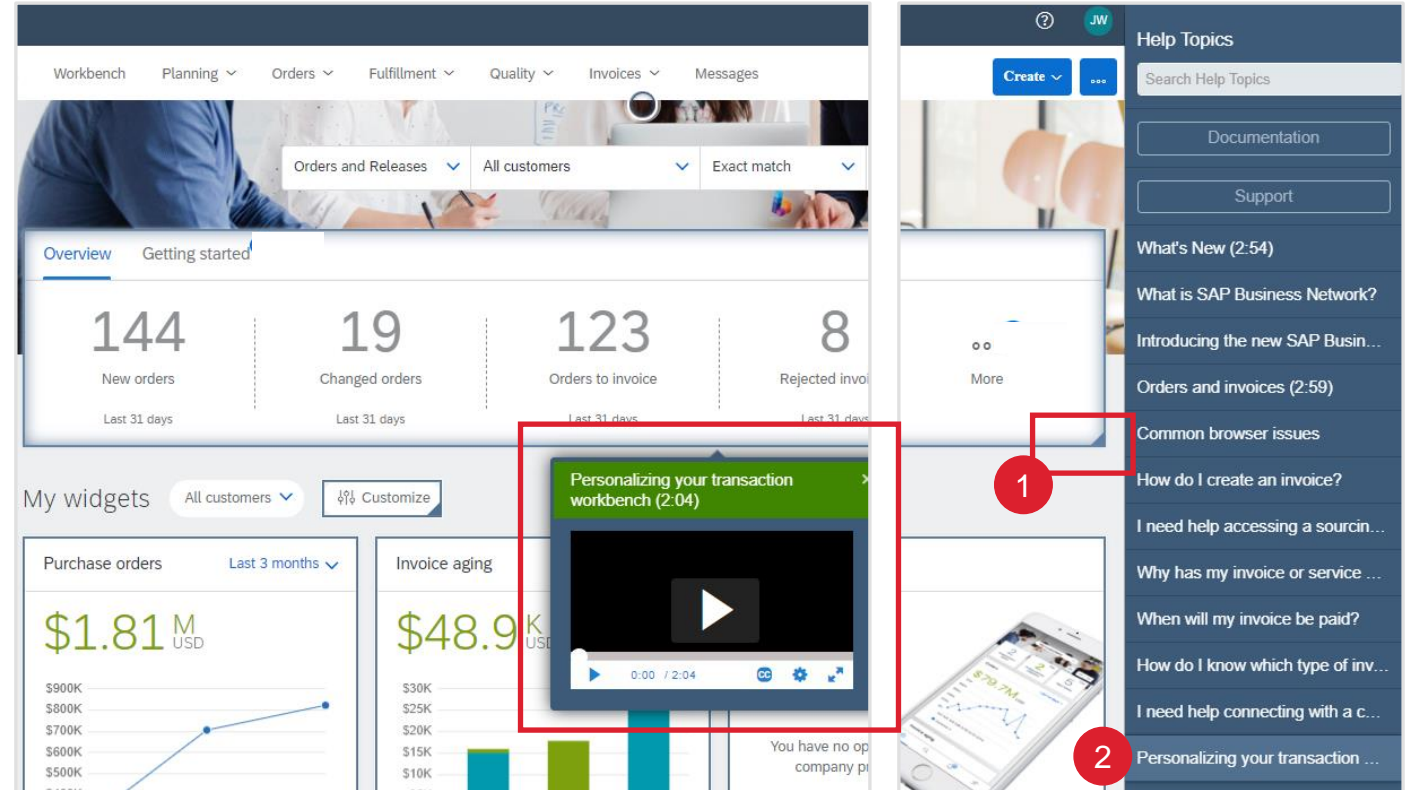
ACTIVE ONSCREEN HELP

Active Onscreen Help allows users to identify the areas they require help with while not leaving the Seller Dashboard/Home page

To activate onscreen help:

1. Click on the blue corner of the fields where help is required. Only the sections with the highlighted corner provides further information.
2. A video will show and the Help Panel will open showing the options for help available in the screen. The example shows a training clip that a user can watch.

Note: the available help is displayed in the Help Topics Pane



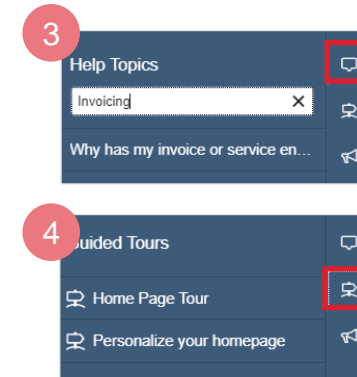
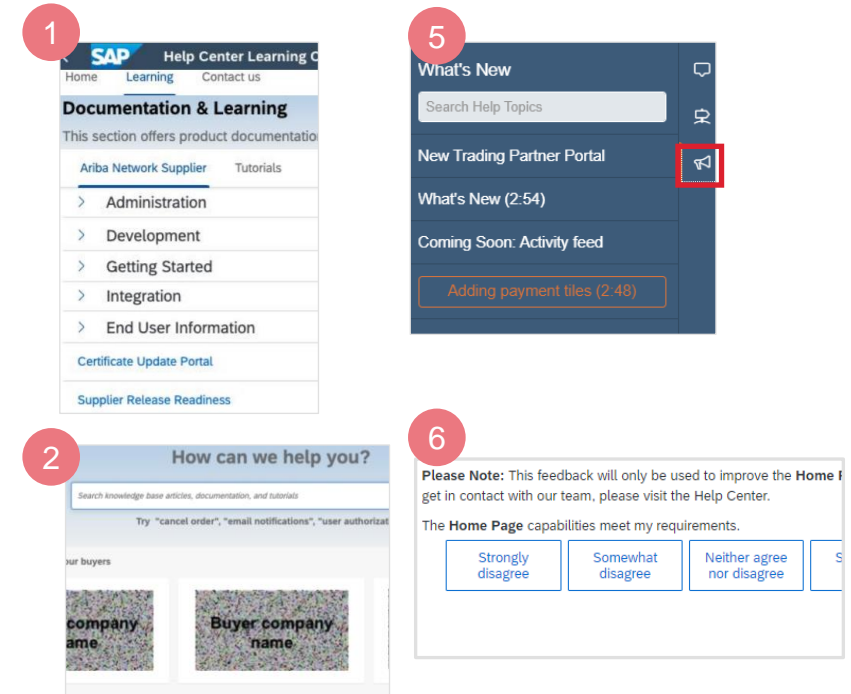
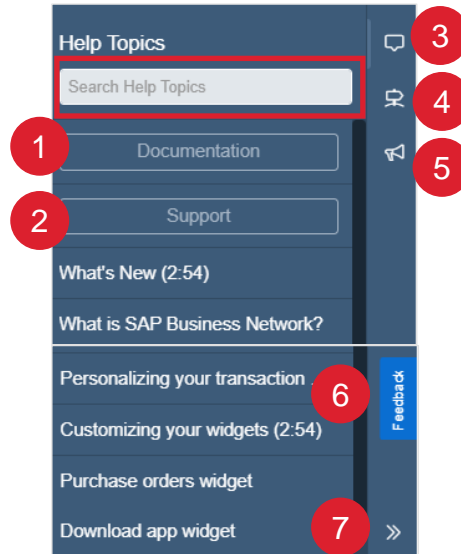
HELP OPTIONS

HELP TOPIC PANE

The options available on the Seller Dashboard/home page:

1. Click on **Documentation** to locate generic documents to complete items in the Ariba Network
2. Click on **Support** to receive Hep Centre assistance
3. Enter a search topic into the **Search Help Topics** field
4. Access **Guided Tours** on the Seller Dashboard/Home page
5. See **What's New**
6. Feedback can be provided on the Homepage
7. ">>" Closes the Help Topics pane

Note: All information contained within the Help Topics Pane is generic, to access Honeywell specific requirements for transacting using the Ariba Network, refer to Accessing the **Supplier Information Portal**



HELP OPTIONS

HELP CENTER – HOME PAGE

The **Help Centre Home** page gives suppliers access to further information, documentation and options for help.

To access to this page, go to (?) > **Support**

From this view, there are 3 tabs available:

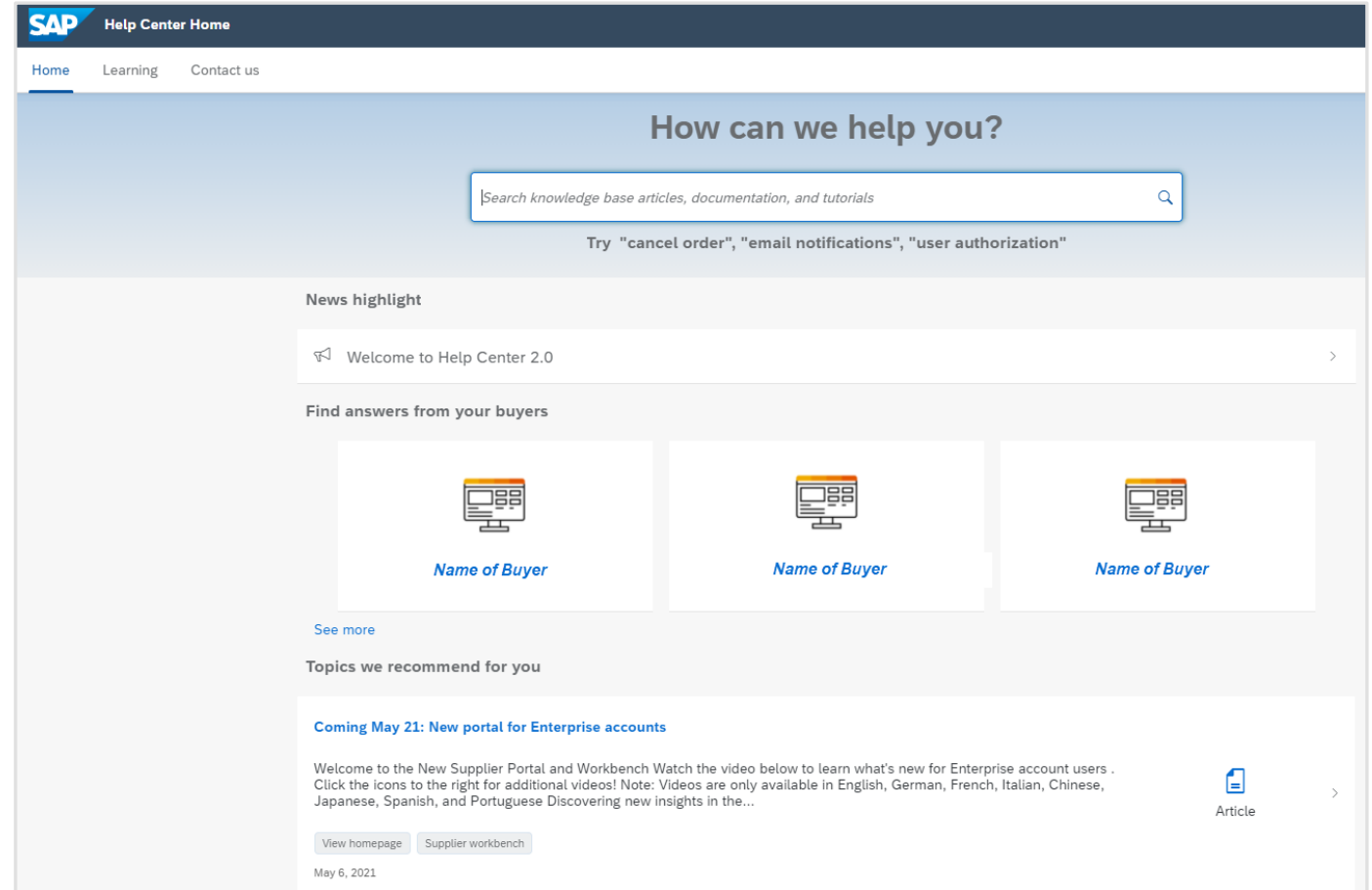
Home – Provides access to Buyer Supplier Information Portals

Learning – provides access to generic Ariba Network documentation and videos

Contact Us – complete the form to gain access to other options for assistance such as:

- Email
- Return Phone call
- Chat

“**How can we help you?**” is displayed, enter your query into the field, to activate the search click on the magnifying glass or press Enter on your keyboard

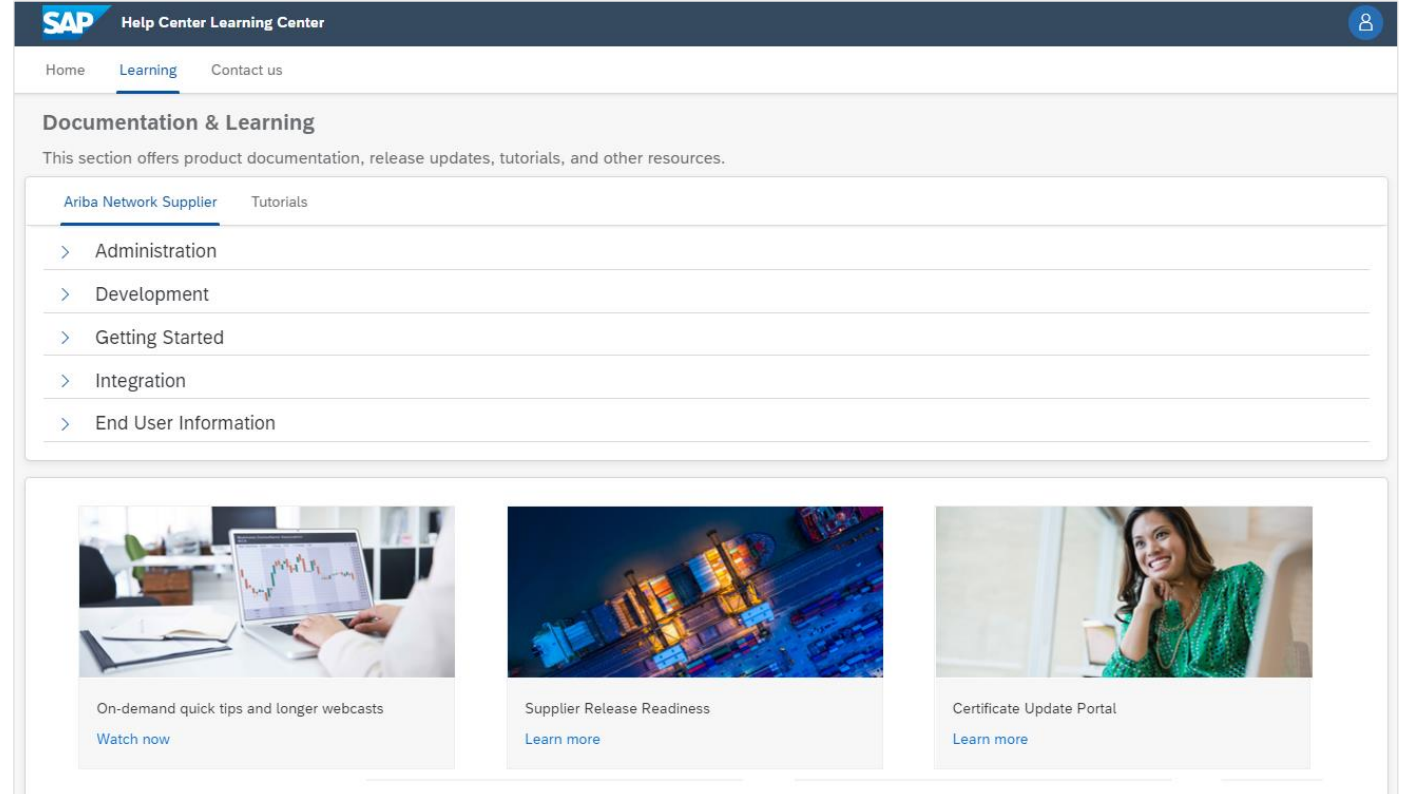


HELP OPTIONS

HELP CENTER – DOCUMENTATION & LEARNING

On the **Documentation & Learning** tab is browsable Product documentation from help.sap.com

- Provides quick access to certificate updates and information about past changes
- Access to updates for “Release Readiness” which contains content for Suppliers on a quarterly basis, providing information about changes, enhancements and functionality
- Suppliers can also access On-Demand success sessions that provide further information on features and functionality of the network
- Click on the required folder where any subcategories will be displayed, select the required information
- Success Sessions are on-demand sessions that suppliers can watch at a time that suits



The screenshot displays the SAP Help Center Learning Center interface. At the top, the SAP logo is followed by the text "Help Center Learning Center" and a user profile icon. Below this is a navigation bar with links for "Home", "Learning" (which is highlighted), and "Contact us". The main heading is "Documentation & Learning", with a subtext stating: "This section offers product documentation, release updates, tutorials, and other resources." Underneath, there are two tabs: "Ariba Network Supplier" (selected) and "Tutorials". A list of categories is shown with expandable arrows: "Administration", "Development", "Getting Started", "Integration", and "End User Information". The bottom section features three promotional cards. The first card, titled "On-demand quick tips and longer webcasts", includes a "Watch now" link and an image of a person at a laptop. The second card, titled "Supplier Release Readiness", includes a "Learn more" link and an image of a cargo ship. The third card, titled "Certificate Update Portal", includes a "Learn more" link and an image of a smiling woman.

HELP OPTIONS

HELP CENTER – CONTACT US

The **Contact Us** tab provides access to Guided Help (Assistance) which provides Suppliers with options to their query based on the information entered into the “How can we help” field

It also starts the Service Request (help) process that identifies the recommended help options based on algorithms, account type and best help option

- The recommendation are matched to the words entered in your search based on previous Frequently Asked Questions (FAQ's)
- The blue bubbles provide access to further information on how to correct or perform processes associated with the query you have entered
- Anything in blue can be selected to provide further information
- Continue to next step opens a form with a series of questions to identify the support that is required

The screenshot displays the SAP Help Center 'Contact us' interface. At the top, there's a navigation bar with 'Home', 'Learning', and 'Contact us' (the active tab). Below this, a search bar contains the text 'Invoicing'. A section titled 'Browse below for our AI-based recommendations*' lists two FAQ items: 'How do I enable the PDF Invoicing feature?' and 'What are the available Close Order options and how can we change them?'. Each item has a blue question mark icon and a date. Below the recommendations, a section titled 'Choose from the options below to continue.' asks 'What do you need to do?' and provides several buttons: 'Create new invoice', 'Create credit memo', 'Raise another invoice against PO', 'Invoice was reject', 'Edit and resubmit invoice', 'Receive payment', and 'Something else' (highlighted in yellow). At the bottom, a link 'Can't find what you're looking for?' is followed by a 'Contact us' button.

HELP OPTIONS

HELP CENTER – CONTACT US – ACCESSING FURTHER HELP

After clicking on the **Contact, us** you can access other help options

1. Click on the **Contact us** button on the bottom of the Contact Us tab screen.
 - A form will open on the screen (many fields will be pre-populated based on the information previously captured, however review the information on the form)
 - All fields with an asterisks must be completed
 - A Recommendations Pane is displayed, this provides information based on the query entered
2. Click on **One last step**

Note: For Supply Chain Collaboration Suppliers (Direct Suppliers) ensure you select SCC from the drop-down menu

Can't find what you're looking for? **Contact us**

Home Learning **Contact us**

Requested language of support: English [Change?](#)
Note: If agents are unavailable to support in the language you've chosen, support will be provided with the assistance of a translation service.

1. Tell us what you need help with.

Subject:* Invoicing

Full description:* Affected items, expected results, etc.

Attachment:

Issue type:*

Issue area:* **Administration**
API
AribaPay
Catalogs
Integration
Invoice or Service Sheet
Purchase Orders or Change Orders
Subscription fees
Supply Chain Collaboration
Trading or customer relationships

Affected buyers:

PO/Invoice Number:

2. How does this impact your normal business processes?

Business Impact:*

3. Please review your contact information for correctness:

First name:*

Last name:*

Username:

Company:*

Email:*

Phone:*

Extension:

Confirm phone:*

☐ My phone number is correct.

Ariba Network ID:*

To see how your data is used by SAP Ariba, you can visit the [SAP Ariba Privacy Statement](#).

One last step

HELP OPTIONS

HELP CENTER – CONTACT US – RECOMMENDED HELP

Based on the information provided, Suppliers will be shown a list of customized options indicating the channel that can provide assistance

The Recommendations are based on the issues type, Supplier type (direct supply source suppliers) and Support Availability

1. Select the method you wish to use by clicking on the radio button
2. Click on **Submit**
3. Once you have clicked on Submit, information to access the Help is provided

Note:

- Ensure any attachments required have been provided, use back to add an attachment to the Contact Us form
- If the issue has been resolved or the information has been found to assist click on Cancel

SAP Help Center Contact us

Home Learning **Contact us**

1 Choose this contact method for the fastest resolution of your issue:

☐ **Recommended**

Phone

A support engineer will respond to your Service Request by phone.

Estimated wait time in minutes: 2

☐ Do not record my phone call.

Other methods you may choose:

☐ **Live chat: open**

You will chat with the same product expert that would normally work your Service Request, soon after you click Submit.

Note: Pop-ups need to be enabled in your browser.

2 **Back** **Submit** Cancel

HELP OPTIONS

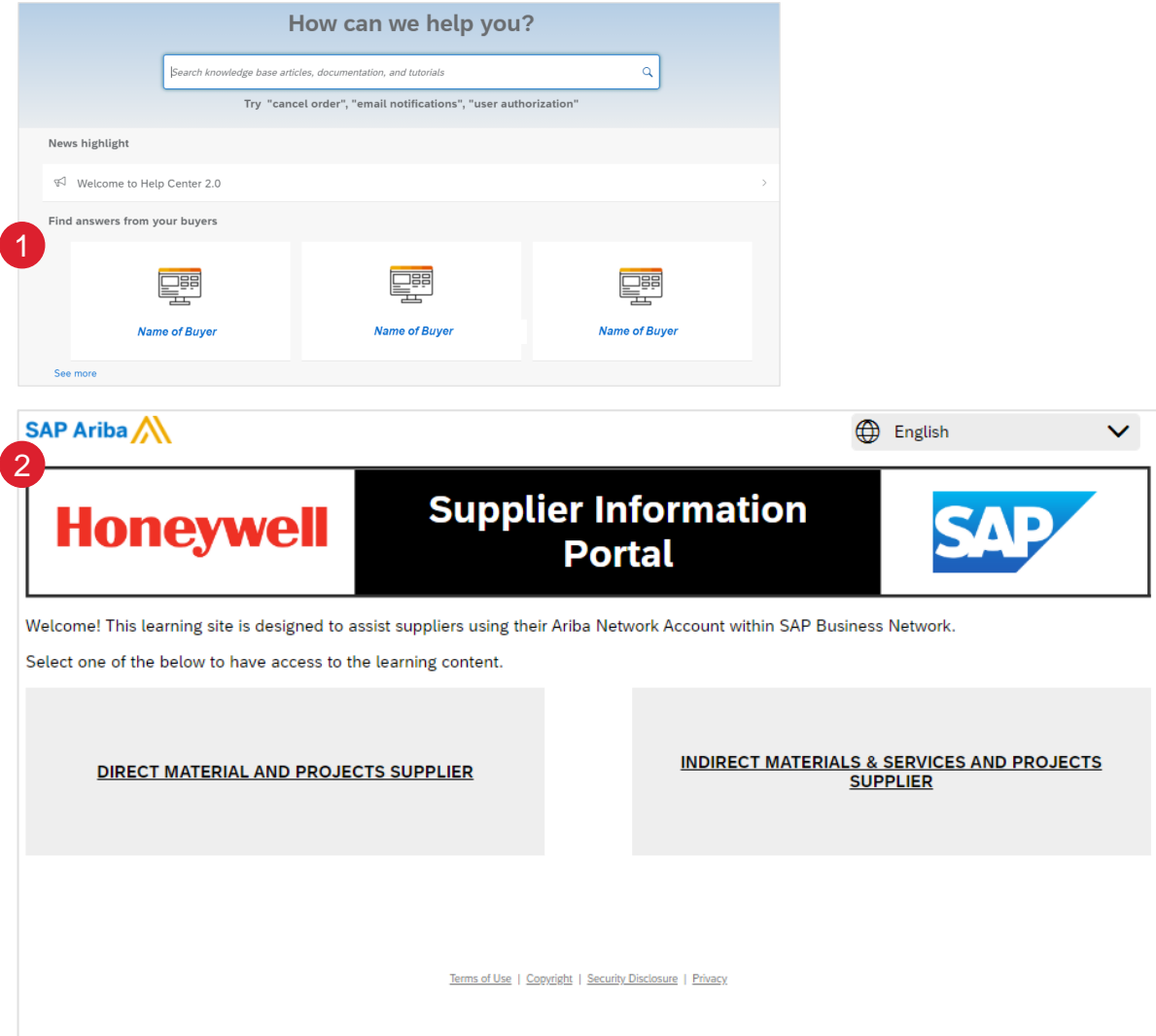
SUPPLIER INFORMATION PORTAL

Each Buyer that a Supplier transacts with will have the **Supplier Information Portal (SIP)** displayed. It contains information that is specific to transacting with a Buyer.

1. Select the SIP required
2. Locate and select the information required

Note:

- The SIP provides information that is both generic and specific for transacting with each Buyer
- Each Buyer may have different process requirements
- Links are blue
- Summit and Training Sessions can be accessed from the SIP, suppliers can watch sessions using an On-Demand process by registering.



WORKBENCH TAB

TRANSACTIONAL WORKBENCH

WORKBENCH INFORMATION

The Tab **Workbench** provides one location for users to find documents that relate to their role.

To access the Workbench, click on the **Workbench tab**

1. **Customize** – allows users display the tiles based on their requirements
2. **Export** – allows users to export a specific tiles information to an Excel spreadsheet
3. **Settings** – users can change the settings based on their requirements
4. **Actions** – allows users to perform actions without opening the document first
5. **Active Filters** – indicate the active filters for the tile displayed and the filters attached
6. **Tiles** – allows users to display the information required. They can provide filtered views of information and are customizable, tiles can be created and saved with the ability to name the tile and determine the numbers of days of information to be displayed

The screenshot displays the Transactional Workbench interface, which is divided into two main panels. The left panel, titled 'Workbench', features a navigation bar with tabs: Home, Enablement, Workbench (selected), Planning, and Orders. It contains two large tiles: 'New orders' with a count of 110 and a 'Save filter' button, and 'Items to confirm' with a count of 21 and a 'Last 31 days' filter. Below these is a table titled 'New orders (110)' with columns 'Order Number' and 'Customer'. The right panel shows a 'Customize' button and two large tiles: 'Orders to invoice' with a count of 197 and a '90 Days of Invoices' filter, and 'Orders with service line' with a count of 1 and a 'Last 31 days' filter. Below these is a table with columns 'Amount', 'Date', 'Order Status', and 'Actions'. Red numbered circles (1-6) highlight specific UI elements: 1. Customize icon, 2. Export icon, 3. Settings icon, 4. Actions icon, 5. Active Filters icon, 6. Workbench tab.

Order Number	Customer
4500003641	SCC Deliver
4500003640	SCC Deliver

Amount	Date ↓	Order Status	Actions
€100.00 EUR	Apr 23, 2021	New	...
€100.00 EUR	Apr 23, 2021	New	...

TRANSACTIONAL WORKBENCH

TILES - CUSTOMIZE WORKBENCH TILES

The transaction Workbench allows users to display the information they require for faster access, and it can be customized by:

- Customer
- Type of Document or process
- Time frame

Tiles provide a filtered view, from the Workbench Screen:

1. Click on **Customize**.
2. To add a Tile, click on “+”.
3. A list of all the available tiles appear. Click on the “+” at the end of the tile you wish to add.
4. The Tile will be added.

The screenshot illustrates the Transactional Workbench interface and the steps to customize it. The top navigation bar includes tabs for Home, Enablement, Workbench, Planning, Orders, Fulfillment, Quality, Invoices, Payments, Catalogs, Reports, and Messages. A 'Customize' button is located in the top right corner, marked with a red circle and the number 1. Below the navigation bar is the 'Edit Workbench' section, which displays a grid of tiles showing various metrics and counts. A red circle and the number 2 highlight the '+' button at the end of the tile grid. To the left of the 'Edit Workbench' section is the 'Add tile' section, which lists various available tiles. A red circle and the number 3 highlight the '+' button next to a tile. To the right of the 'Add tile' section is a zoomed-in view of a tile, with a red circle and the number 4 highlighting a tooltip that says 'You'll see the actual count on the Workbench page.'

TRANSACTIONAL WORKBENCH

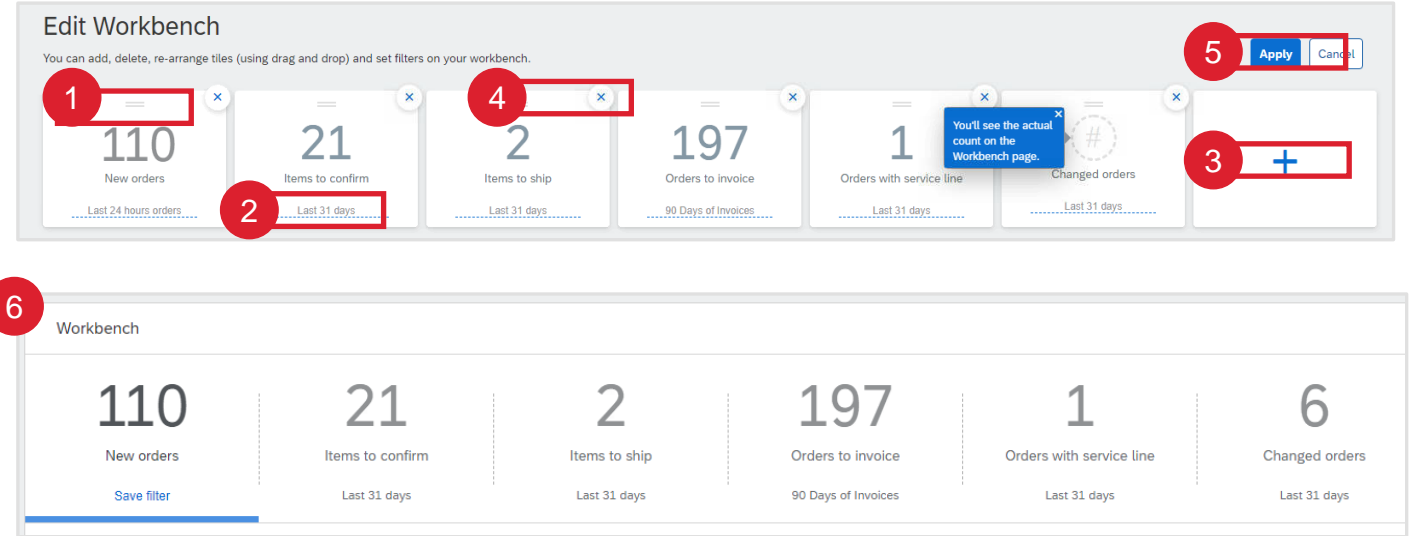
TILES - EDIT WORKBENCH TILES

When a Tile is added to the Workbench it appears at the end of the list.

This is what you can do to edit the Tiles:

1. Tiles can be moved, hover over the tiles, when a hand appears hold down the mouse button and move to the desired tile position
2. The information above the dotted line within the tiles can be changed from the default to reflect something else, for example “Jane’s View”
3. Further Tiles can be added by clicking on the “+”
4. To remove tiles, Click on the “(X)” at the top-right corner of the tile.
5. Once you have added and removed the required Tiles, click on Apply
6. Drag and drop any of the workbench tiles to re-arrange the order in which they appear, and the tile order will appear in the overview bar of the homepage

Note: The pop-up box indicates that the number of Changed Orders does not appear in the Customize view



TRANSACTIONAL WORKBENCH

EXPORT DATA FROM THE WORKBENCH

The information contained within each tile can be exported into an excel format document

1. Click on the Tile to display the information
2. Click on the paper icon
3. The Spreadsheet will show at the bottom of the screen.
4. Click to open, the spreadsheet will display. Spreadsheets can be used to perform matching to your ordering system or ERP (for non-integrated suppliers)

Workbench

110

New orders

Save filter

21

Items to confirm

Last 31 days

2

Items to ship

Last 31 days

197

Orders to invoice

90 Days of Invoices

1

Orders with service line

Last 31 days

6

Changed orders

Last 31 days

Items to confirm (21)

> Edit filter

Save filter

Next 90 days

Last 31 days

Exclude confirmation not all... +1

Exclude fully shipped

Exclude fully received

Exclude fully invoiced

Confirm

Reject

Item No. ↑

Supplier Part No.

Description

Need By

Ship By

Requested Quantity

Confirmed Quantity

Requested Unit Price

Estimated Shipping

Est

Actions

Customize

2

3

1619397429392.xlsx

1619397407198.xlsx

1619397399732.xlsx

4

SAP Ariba

Results

Order Number	Customer	Amount	Date	Order Status	Amount Invoiced
4500003641	SCC Delivery Team - Global H19 Client 400 - TEST	100.00 EUR	24 Apr 2021 05:51:30 AM	New	
4500003640	SCC Delivery Team - Global H19 Client 400 - TEST	100.00 EUR	24 Apr 2021 05:44:20 AM	New	
4500003631	SCC Delivery Team - Global H19 Client 400 - TEST	140.00 EUR	23 Apr 2021 01:06:14 AM	Partially Received	
4500003620	SCC Delivery Team - Global H19 Client 400 - TEST	33.00 EUR	22 Apr 2021 10:51:41 PM	Partially Shipped	
4500003619	SCC Delivery Team - Global H19 Client 400 - TEST	10.00 EUR	22 Apr 2021 08:06:16 PM	Partially Shipped	
4500003618	SCC Delivery Team - Global	10.00 EUR	22 Apr 2021 07:51:22 PM	Partially Shipped	

Note: Only one tile at a time can be exported

TRANSACTIONAL WORKBENCH

WORKBENCH TABLE SETTINGS

The Workbench table Settings allow suppliers to identify the table headings displayed

The headings provide information without opening the document. Some table headings can be sorted by clicking on the heading in the heading ribbon.

To change the **Table column** headings:

1. Click on the settings icon. A screen called “Table settings” will open.
2. Hover over the tables until the cursor turns into a hand, then drag and drop from one column to the other
3. Click on **Date and Time** in the side menu to change the table settings for Date and Time information
4. Once all updates have been made. Click on **Apply**

The screenshots illustrate the process of configuring table settings:

- Step 1:** The main Workbench dashboard is shown. The settings icon (a gear) is circled in red and labeled with a red circle containing the number 1.
- Step 2:** The 'Table setting' dialog is open. A red arrow indicates a drag-and-drop action from the 'Available columns' list to the 'Displayed columns' list. The 'Available columns' list includes: Type, Version, Inquiries, Ship To Address, Ordering Address, Routing Status, External Document Type, Settlement, Revision, Company Code, and Purchasing Organization. The 'Displayed columns' list includes: Order Number, Customer, Amount, Date, Order Status, and Amount Invoiced.
- Step 3:** The 'Table setting' dialog is shown with the 'Date and time' tab selected in the side menu. A toggle for 'Timestamp' is visible, with the text 'To display timestamps in a date column, turn on the respective Timestamp (Example: Aug 2)'.
- Step 4:** The 'Table setting' dialog is shown with the 'Apply' button highlighted in blue.

TRANSACTIONAL WORKBENCH

EDIT FILTER

The Edit Filter allows users to filter tiles by parameters such as:

- Customer
- Date
- Status
- Customer Locations
- Order Type
- Routing

Each Tile has its own set of filters, review the filters and select the ones that are required based on the Tile and the parameters associated with it.

The process remains the same irrespective of the tile used:

1. Click on the **Tile** you want to customize
2. Click on **Edit filter**
3. Choose the options from the available filters, once all parameters have been selected
4. Click on **Apply**, the filters appear next the Edit Filter selection

Note: The available parameters are displayed, some selections will have a Checkbox while others a drop down list

The screenshot displays the 'Workbench' interface with five tiles: 'New orders' (110), 'Items to confirm' (21), 'Items to ship' (2), 'Orders to invoice' (197), and 'Orders with service line' (1). The 'Orders to invoice' tile is selected, and the 'Edit filter' option is highlighted. The filter configuration panel for 'Orders to invoice (197)' is shown, featuring several filter categories: 'Customers', 'Order numbers', 'Creation date', and 'Company codes'. The 'Creation date' filter is expanded, showing a list of time ranges: 'Last 24 hours', 'Last 7 days', 'Last 14 days', 'Last 31 days', 'Last 90 days' (selected), 'Last 365 days', and 'Custom date range'. The 'Apply' button is highlighted with a red circle and the number 4.

TRANSACTIONAL WORKBENCH

SAVE FILTER

Save Filter allows users to save the parameters for a tile, **Edit filter** only edits the view at the moment a user makes filter changes, but is not saved until **Save Filter** is performed

Once all parameters have been set

1. Click on **Save Filter**
2. Confirm the description, this can be changed to reflect a specific customer or other description
3. Click on **Save**

