Personal Labels Process Guide

Each user within NC E-Procurement has access to Labels. These Labels can be used to organize eRequisitions, purchase orders, and other approvables. Each user has a default label of ‘Archive Items,’ and has the ability to create more labels to identify and sort their approvables.

‘Labels,’ in the new version of Ariba Buyer for NC E-Procurement, are similar to ‘Folders’ in the previous version. Unlike Folders, there are no ‘Sub-Labels’ in the new version of Ariba Buyer, as there were for folders in the past version. However, multiple Labels can be added to a single approvable for further identification.

It is important to keep in mind that while Labels can be a very useful tool for organizing and locating items within NC E-Procurement, most times a system search will be more effective and efficient at pulling back information. Labels should be used sparingly, if possible, and only in situations where a system search will not do the job.

When Should I Use System Searches?
A user should use system searches instead of labels in scenarios where there is a shared characteristic across all of the approvables in the group. For example, if the user would like to quickly locate all of the requisitions for one supplier, they should use System Searches instead of labels. System Searches are a more reliable tool because it is not dependent on an action by the user (e.g., assigning a label to a requisition). System Searches pull back data with less initial work from the user, and with better performance. Another example in which a system search is more logical would be for transactions in a given time frame, such as the past quarter. The items all share a common characteristic, the time frame, and it is more efficient and requires less upfront work to perform a system search. Searches can be saved for specific suppliers or time frames, and are a quick and easy way to pull back items with a common data point. For more information about creating, saving, and executing system searches, please refer to the ‘System Searches’ process guide.

When Should I Use Labels?
A user should apply a label to an item when it is something that they need to be able to access quickly but that may not share a common search field with the other items that are in the same label. If any common searchable characteristic, such as supplier or time frame, is shared, System Searches should be utilized. One example would be requisitions or purchase orders that are recurring monthly, for which one requisition may serve as a template. The template requisitions should have a label applied to them so that they can be located quickly. Labels can also be used for groups such as ‘High Priority Items,’ that may not have a common characteristic other than being high priority. Once the item has been completed and is no longer high priority, the label should be removed. Lastly, labels are a good way to group together approvables that are all related to the same event, such as requisitions relating to a declared emergency. In this situation, the items do not have a common characteristic other than the fact that they all are related to the same event. It is very important to keep in mind that users should not use Labels when a system search will suffice, as system searches are more reliable, as they are not dependent on the action by the user (e.g., assigning a label to a requisition) and have better performance.
I. Adding Items to Labels from Search Results

1. From the Ariba Dashboard, perform a system search that will return the items to which you would like to assign a Label. To do this, populate the criteria fields and click ‘Search.’ For more information on System Searches, please see the ‘System Searches’ process guide.

Note: The searches that will return items that can be labeled are: eRequisition, Purchase Order, Receipt, User Profile, User Maintenance, and Address Maintenance.
2. Once the search is returned, check the box next to the item to which you would like to apply a Label, and click ‘Label.’

3. The ‘Apply Label’ options will appear. If you have not previously created any Labels, only ‘Archive Items’ and ‘New Label’ will appear as options.

4. To assign the item to the ‘Archive Items’ Label, click the ‘Archive Items’ option.

5. To create a new Label and assign the item to that Label, click ‘New Label.’
6. Once ‘New Label’ is clicked, an ‘Add Label’ pop-up window will appear.

7. Enter the Label name in the ‘Enter New Label’ field and click ‘OK’.

8. Once the new Label is named and you click ‘OK,’ you will be returned to the ‘Search’ page.

9. The new Label will appear on the left hand side of the page under ‘My Labels.’
II. Adding Labels from Approvables

1. From the Ariba Dashboard, perform a system search that will return the items to which you would like to assign Labels. To do this, populate the criteria fields and click ‘Search.’

**Note:** The searches that will produce items that can be labeled are: eRequisition, Purchase Order, Receipt, User Profile, User Maintenance, and Address Maintenance.
2. Once the search is returned, click on either the approvable ID or the approvable Title.
3. Click ‘Apply Label.’

4. The ‘Apply Label’ options will appear. If you have not previously created any Labels, only ‘Archive Items’ and ‘New Label’ will appear as options.

5. To assign the item to the ‘Archive Items’ Label, click the ‘Archive Items’ option.

6. To create a new Label and assign the item to that Label, click ‘New Label.’
7. Once ‘New Label’ is clicked, an ‘Add Label’ pop-up window will appear.

8. Enter the Label name in the ‘Enter New Label’ field.

9. Click ‘OK.’
10. Once the new Label is named and you click ‘OK,’ you will be returned to the approvable.

11. The new Label will appear at the header level of the approvable.

**Note:** Multiple Labels can be added to the same approvable by following the same process described above.

**Note:** The same Label can be added to ANY approvable type. For example, an eRequisition and a purchase order can have the same Label.
III. Using Labels to Locate Approvables

Starting from the Ariba Dashboard, Labels that have been assigned to approvables can be used to locate all items with that Label assigned to them.

1. For a search for approvables to which a Label has been applied, the Label will appear in the ‘Search’ Portlet on the Ariba Dashboard.
2. Select the approvable type that you would like to locate by its Label.
3. If a Label is available, it will appear once that search is selected.
4. Click on the Label name to access items in that approvable type that have been assigned that specific Label.

**Note:** If you have assigned a Label to more than one approvable type (e.g., eRequisitions and Purchase Orders) you will have to go to both the ‘eRequisition’ and ‘Purchase Order’ searches and click on the respective Label name in order to view the items. If you are on the ‘Purchase Order’ search and click on the desired Label, any eRequisitions that have also been assigned this Label will **NOT** appear.

![Diagram showing how to use Labels to locate approvables](NC E-Procurement@YourService.png)
IV. Deleting a Label from an Approvable

Labels can be removed from an approvable at any time by accessing the approvable via the ‘Search’ or by clicking on the Title of the approvable. For more information regarding the System Search functionality, please refer to the ‘System Searches’ process guide.

1. From the ‘Search’ page, pull up the approvable from which you would like to remove the assigned Label.

2. Check the box next to the approvable and click ‘Label.’

3. Labels that are available to be removed are displayed under the ‘Remove Label’ header.

4. Click the name of the Label that you want to remove from the approvable.

**Note:** To remove multiple Labels from the same approvable, repeat the same process for each Label.

**Note:** If you remove a Label from the only item that it was assigned to, it will also delete the Label itself. You will have to recreate the Label in order to assign it to future approvables.

**Note:** Any time you see the ‘Label’ drop-down menu you will be able to perform the Add, Delete, and Assign Label functions. This includes, but is not limited to, System Searches, initial approvable creation, and approving items.

Selecting this Label will remove the Label from the approvable.