Using Spend Analytics for Benefit Bank Entries
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Click any topic on the left to advance to the scenario.

Each scenario contains step-by-step instructions for generating reports. To view live demos, visit the Spend Analytics 30/30 Training Page.

DENOTES A CHANGE MADE IN SPEND ANALYTICS SINCE THE SCENARIO WAS CREATED.
Using Spend Analytics for Benefit Bank Entries

Page 1 of 2

In this scenario we will use Spend Analytics to help populate a few of the required fields in the **UC Benefit Bank**.

**Supplier Normalized Name:** The drop-down list of Suppliers in the Benefit Bank application is pulled from the Spend Analytics tool. Spend Analytics can be used to identify the different variations of the supplier name used across the campuses, that have been rolled up into the single supplier normalized name in Benefit Bank.

**STEP 1** In the **Search Box** enter the **Supplier Name** (“Dell”). In the Supplier Name field, you can see the different variations of the supplier name used across the campuses.

**STEP 2** Make your selection from the **Supplier Normalized Name** field (“DELL INC”).

The **Spend by Top Suppliers** container will display the each variation of the supplier name. Position your cursor over the graph to see total spend for a specific supplier.

**Benefit Baseline:** Spend Analytics can also help determine spend for a specific product or item number to use as a baseline for calculating benefit. We will continue the above scenario by including a specific Dell item number in the search to determine pricing.

**STEP 3** Enter the item number into the **Search Box** (“225-2655”) and click **Expand** to expand the results in the **PO Line Description** field. The search results indicate 32 results of PO lines containing the item number.

**STEP 4** Select the **PO Line Description** header to include the entire batch of POs in your search.

**STEP 5** To identify the price paid for the items, navigate to the **Analysis > Custom Reports** tab and enter the desired **Dimensions** (Supplier Normalized Name, PO Date, PO Number, PO Line Description) and **Metrics** (PO Commitment). **Note:** Your report will begin populating once you select a **Metric**.

**UC Category Group:** To identify the appropriate UC Category Group for the item, include an additional **Dimension** in your report: **Tier 3 UC Category Group**.

Questions? For help with Spend Analytics, please contact your **Campus Primary Rep (CPR)**.
When the report renders, locate the most recent **PO Date** (“03/07/2014”) and document the **PO Number** (“90808067”). Using the **Invoice/PO Details** functionality, we can get more details about this PO.

**STEP 5** Select the **Invoice/PO Details** tab and enter the **PO Number** into the search field (“90808067”). Select the **PO Number** from the search results.

**STEP 6** Double-click the **PO Detail** icon. The PO details will contain the **Unit of Measure**, **Unit Price**, **Quantity** and **Total Spend** for the item.
In this scenario we will search for suppliers within a specific geographic region. We will also generate a report containing the suppliers’ contact information and details regarding the specific commodities purchased.

**STEP 1** To begin your local supplier analysis, navigate to the **Selections Tab** and select the **Supplier** category.

**STEP 2** In the **Supplier State** field, click the Search icon. This will open an input field where you can begin typing the desired **State** abbreviation. Make your selection from the list (“CA”).

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**Questions?** For help with Spend Analytics, please contact your [Campus Primary Rep (CPR)](mailto:).
**STEP 3** In the **Supplier City** field, click the **Search** icon. An input field will open where you can begin typing the desired **City** ("Riverside"). Make your selection from the list.

When the search results display multiple variations of the **City** name, hold down the Control key and left-click your mouse on each (**CTRL + CLICK**).

When all variations are selected, release the **CTRL** key. The selected values will be highlighted in green.
STEP 4  Click the Overall Procurement category and select the desired Tier 3 – UC Category Group ("MRO").

STEP 5  Navigate to the Analysis tab and select Custom Reports. Select the desired Dimensions (Campus, Supplier Normalized Name, Supplier Name, Supplier Address 1, Supplier Address 2, Supplier City, Supplier State, Supplier Zip) and Metric (Spend). Once you select a metric, the report will begin populating. (You may have to scroll to the right and click the Fast Change icon to view the full report.)

The report will display details, including spend, for each of the local suppliers.
To include information on what was purchased from these local suppliers, continue to add **Dimensions** to the report (**"Invoice Line Description"** and **"PO Line Description"**).

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<th>Supplier Name</th>
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**DIMENSIONS SELECTED:** Campus, Invoice Line Description, PO Line Description, Supplier Address 1, Supplier Address 2, Supplier City, Supplier State, Supplier Zip.
In this scenario we will perform payment analysis on campus-specific payment methods as well as “normalized” payment methods. We will also drill down and analyze payments related to a specific Invoice.

**Payment Method** is one of the enhancements to the Phase 2 user interface. Campus Accounts Payable determines the payment method with each Supplier. These campus-specific payment methods are normalized in the Spend Analytics tool (for example: “Travel Cards”) with the ability to drill down to the campus-specific method (TCard, Travel Event Card, Travel Reimbursement, etc.)

**STEP 1** To begin your payment method analysis, select one of the **Normalized Payment Methods** in the 4th Container (“Travel Card”).

The container will update to display the various campus-specific payment methods that have been normalized into the category (Travel Reimbursement, Travel Direct Bill, TCard, Travel Event Card).

**STEP 2** Navigate to the Analysis > Custom Reports tab.
STEP 3  On the Custom Reports tab select the checkbox next to the desired Dimensions (Campus, Normalized Payment Name, Payment Method) and Metrics (Spend). The report will begin to populate when at least one dimension and one metric are selected.

The report will display each campus payment method that is rolled up into the Normalized Payment Method. (You may need to scroll to the right and click the Fast Change icon to expand all sections of the report.)

STEP 4  Select a campus row in the report (UCR) and continue to select Dimensions (“Department”) until you get the desired information in your report.
In the next scenario we will use the **Payment Method** functionality to identify whether a specific purchase order/invoice has been paid.

**STEP 1** On the **Dashboard Tab**, type the **Supplier Name** into the **Search Box** (Verizon) and make your selection from the **Supplier Normalized Name** field (Verizon Communications Inc).

**STEP 2** Select the desired **Campus** (UCLA) and **Date Range** (March, 2014).

**STEP 3** Enter the **PO Number** into the **Search Box** (**3200XRB03600**) and make your selection from the **PO Number** field.

The **Dashboard** will render to display all available details for the selection criteria entered. The **Spend by Payment Method Container** will display the payment method for the Purchase Order (EFT).

**STEP 4** Navigate to the **Analysis > Custom Reports** tab to get more details about the payment.

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**Questions?** For help with Spend Analytics, please contact your [Campus Primary Rep (CPR)](mailto:campusprimaryrep@ucla.edu).
**STEP 5**  On the **Custom Reports** tab select the checkbox next to the desired **Dimensions** (*Campus, Invoice Payment Date*) and **Metrics** (*Spend*). The report will begin to populate when at least one dimension *and* one metric are selected.

The report will display the payment date and amount for the selected purchase order.
This document contains four scenarios with tips and shortcuts for **Advanced Search Capabilities**.

The **Search Box** enables you to perform a keyword-based search across all data elements in the system. Entering a word or phrase into the **Search Box** generates all search results containing that word or phrase.

**SCENARIO #1:** In this example we will search all PO line descriptions for a specific keyword (“**recycle**”).

**STEP 1** On the **Dashboard**, type the keyword into the **Search Box** and select the ![expand](to expand the results in the **PO Line Description** field.

**STEP 2** After you expand the results, click the **PO Line Description** heading to select all data lines.

Review the **Current Selections** box which will reflect the number of **PO line descriptions** containing the keyword (2866).

**STEP 3** To generate a report of the items, select the **Custom Reports** tab.

(Note: In Spend Analytics Phase 2, access **Custom Reports** from the **Analysis** tab. All other functionality is the same.)
STEP 4  On the **Custom Reports** tab select the checkbox next to the desired **Dimensions** (Campus, PO Line Description) and **Metrics** (Spend). The report will begin to populate when at least one dimension and one metric are selected.

![Select Dimension(s) and Select Metric(s) options](image)

STEP 5  The report will default in a collapsed view. Scroll to the right and click the **Fast Change icon** to expand the report to view all **Campus PO Line Descriptions** containing the keyword (“recycle”).

![Expanded report view](image)
SCENARIO #2: In the next example the Search Box will be used to target spend for a multiple word item. We will search Invoice Line Descriptions for two keywords: “electrical” and “gloves”.

STEP 1 On the Dashboard tab, type the first keyword into the Search Box and select the + to expand the results in the Invoice Line Description field.

STEP 2 After you expand the section, click the Invoice Line Description heading to select all data lines.

STEP 3 Type the second keyword into the Search Box and select the + to expand the results in the Invoice Line Description field.

STEP 4 After you expand the section, click the Invoice Line Description heading.
Review the Current Selections box which now reflects the number of data line descriptions containing both of the keywords (11).

**STEP 5**  Select the Custom Reports tab to generate a report of the items.

(Note: In Spend Analytics Phase 2, access Custom Reports from the Analysis tab. All other functionality is the same.)

**STEP 6**  On the Custom Reports tab select the checkbox next to the desired Dimensions (Campus, Invoice Line Description) and Metrics (Spend, Invoice Quantity). The report will begin to populate when at least one dimension and one metric are selected.

**STEP 7**  The report will default in a collapsed view (default). Click the Fast Change icon to expand the report to view all of the selected Dimensions and Metrics.
SCENARIO #3: Finally, here are some tips and features that will enhance your searching and reporting capabilities.

1) **Wild Card: Asterisk**
If you enter an asterisk (*) immediately after your keyword (Construction*), the result will be all of the values with the key word as the first word.

2) **Wild Card: Quotation Marks**
Entering double quotes around a phrase (“Construction Paper”) will perform an exact search for the word combo.

3) **Dashboard Visualizations**
Use the Fast Change icon to change the visualization in any container on the Dashboard. Toggle between 1) Bar Chart, 2) Pie Chart or 3) Straight Table view.

4) **Copy/Paste Visualizations**
To copy a graphic to paste into another application (PowerPoint, Word, etc.), right-click the container and select “Print.” The image will open in a separate window where you can select all (CTRL + A), copy (CTRL + C) and paste (CTRL + V).

Questions? For help with Spend Analytics, please contact your Campus Primary Rep (CPR).
In this scenario, we will develop three Custom Reports to analyze Spend by Supplier, including 1) supplier spend for a specific campus as well as systemwide; 2) supplier spend for specific campus departments; and 3) supplier spend broken down by the commodities the supplier provides.

**STEP 1:** Enter the Supplier Name into the Search box (OfficeMax) and make your selection from the Supplier Name field.

**STEP 2:** Make additional Campus (UCSC) and Date (FY13) selections as needed.

**STEP 3:** On the Custom Reports tab, select the desired Dimensions (Campus, Supplier Name) and Metric (Spend). Once you select a metric, the report will begin populating. (You may have to scroll to the right and click the Fast Change icon to view the full report.)

The custom report will display a total Supplier (OfficeMax) spend for the Campus (UCSC) within the Date range (FY13).

**Step 4:** To generate a report of systemwide spend, first remove the existing selections and again enter the Supplier Name into the Search box (OfficeMax). This time, make your selection from the Supplier Normalized Name field (OFFICE MAX).

**STEP 5:** Make the appropriate Date selection (FY13).

**STEP 6:** On the Custom Reports tab, select the desired Dimensions (Campus, Supplier Normalized Name, Supplier Name) and Metric (Spend). Once you select a metric, the report will begin populating. (You may have to scroll to the right and click the Fast Change icon to view the full report.)

**Questions?** For help with Spend Analytics, please contact your Campus Primary Representative.
Because we selected the **Supplier Normalized Name**, the report will now show all spend across the UC for the **Supplier (OfficeMax)** regardless of the variation of the **Supplier** name used by a campus.

In the next scenario, we will generate a report of supplier spend for a specific campus showing individual **Department** spend.

**STEP 1:** Enter the **Supplier Name** into the **Search box (VWR)** and make your selection from the **Supplier Normalized Name** field (**VWR INTERNATIONAL INC**)

**STEP 2:** Make additional **Campus (UCSF)** and **Date** (FY13) selections as needed.

**STEP 3:** On the **Custom Reports** tab, select the desired **Dimensions** (**Campus, Supplier Normalized Name, Department Name, Department Number**) and **Metric** (**Spend**). Once you select a metric, the report will begin populating. (You may have to scroll to the right and click the **Fast Change** icon to view the full report.)

The custom report will display all **Supplier (VWR)** spend by **Campus (UCSF)** departments within the **Date** range (FY13).
In the final scenario, we will generate a report showing spend broken down by the different commodities provided by a supplier.

**STEP 1:** Enter the **Supplier Name** into the **Search box** (Dell) and make your selection from the **Supplier Normalized Name** field (DELL INC).

**STEP 2:** Make the appropriate **Date** selection (FY13).

**STEP 3:** On the **Custom Reports** tab, select the desired **Dimensions** (Campus, UNSPSC Level 1, 2, 3 and 4) and **Metric** (Spend). Once you select a metric, the report will begin populating. (You may have to scroll to the right and click the **Fast Change** icon to view the full report.)

The custom report will display a breakdown of all **Supplier** (Dell) spend by within the **Date** range (FY13), broken down by commodity.

If desired, select an additional **Dimension** (Tier 3 - UC Category Group) to identify which group the commodity belongs to.

**Questions?** For help with Spend Analytics, please contact your **Campus Primary Representative**.
In this scenario, we will develop three **Custom Reports** to analyze Spend by UC Category Groups: for a supplier, a specific commodity and for an item already purchased.

**STEP 1** Make the desired Campus selection in the **Selections Overview** section (UCSD).

**STEP 2** Click the **Custom Reports** tab to begin selecting filters for your report.

**STEP 3** Select the desired **Dimensions** (Tier 1 – UC Spend Type, Tier 2 – UC Procurement Scope and Tier 3 – UC Category Group) and **Metric** (Spend). Once you select a metric, the report will begin populating. (You may have to scroll to the right and click the **Fast Change** icon to view the full report.)

The report will display the different buckets of addressable and non-addressable spend related to your selection (UCSD).

**STEP 4** To limit the report to addressable spend only, click the **Selections** tab.

**STEP 5** On the **Selections** tab, select the drop-down arrow next to **Tier 1 – UC Spend Type** and select “Addressable”.

**STEP 6** Return to the **Custom Reports** tab. The non-addressable spend will be removed from the report. The report will display a breakdown of addressable spend for the campus selected (UCSD).

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**Questions?** For help with Spend Analytics, please contact your [Campus Primary Rep (CPR)](mailto:). MAR 2014
In the next example, we will determine the Supplier Spend within each UC Category Group.

**STEP 1**  On the Dashboard tab, in the **Search Box** enter the **Supplier Name** (Apple). Make your selection from the **Supplier Normalized Name** field (APPLE INC).

**STEP 2**  Click the **Custom Reports** tab to begin selecting filters for your report.

**STEP 3**  Select the desired **Dimensions** (Tier 1 – UC Spend Type, Tier 2 – UC Procurement Scope and Tier 3 – UC Category Group, and Supplier Normalized Name) and **Metric** (Spend). Once you select a metric, the report will begin populating. (You may have to scroll to the right and click the **Fast Change** icon to view the full report.)

The report will display the different buckets of addressable spend for the selected Supplier (Apple).
In the final scenario we will determine which UC category group a purchased item belongs in.

**STEP 1** On the Dashboard tab, in the Search Box enter all or part of the item name (Computers). Make your selection from the UNSPSC Level 3 field (15 - Computers).

**STEP 2** Click the Custom Reports tab to begin selecting filters for your report.

**STEP 3** Select the desired Dimensions (UNSPSC Level 1, UNSPSC Level 2, UNSPSC Level 3, Supplier Normalized Name, Tier 1 – UC Spend Type, Tier 2 – UC Procurement Scope and Tier 3 – UC Category Group) and Metric (Spend). Once you select a metric, the report will begin populating.

The report will display the category group the purchased item (Computers) belongs in (IT and Telecom).
Home Page

1. **Tabs**: Phase 2 user interface has four tabs: **Dashboard**, **Analysis**, **Selections** and **Help Page**. Within these four tabs you will have access to all of the old Spend Analytics functionality and few new features.

2. **Data Type**: In the new system you can select from two new Data Types: **Spend** (which includes AP and PCard data) or **PO Commitment** (funds committed but not spent).

3. **Campus**: The Campus selection will contain only **Phase 2 Campuses**. Data for other campuses will continue to be available in the Phase 1 system and can be accessed via your Campus Primary Rep (CPR).

4. **Spend by Classification**: This container now uses **UC Category Groups** (Building Construction, Life Sciences, MRO, etc.) as the first tier selection criteria. Within each UC Category Group you can drill down to the various product classification (UNSPSC) codes.

5. **Spend by Payment Method**: This container now reflects how funds were paid (ACH, Check, Travel Reimbursement, etc.). Choose between two views: **Spend by Payment Method** or **Transaction Count by Payment Method**.

**Questions?**  For help with Spend Analytics, please contact your [Campus Primary Representative](mailto:campusprimaryrepresentative@uc.edu).
Analysis Tab

The Analysis Tab in the Phase 2 user interface contains 5 of the original Phase 1 data views, plus one additional view for Invoice/PO Details.

Classification and Supplier Breakouts (BY CAMPUS, DATA SOURCE OR PAYMENT METHOD)

Custom Reports (SELECT DIMENSION AND METRIC TO BEGIN POPULATING YOUR REPORT)

Price Analysis

Questions? For help with Spend Analytics, please contact your Campus Primary Representative.
Analysis Tab (continued)

Opportunity Assessment (SELECT FROM UC CATEGORY GROUPS)

Invoice / PO Details (CLICK ∑ TO RENDER REPORT; ADD DIMENSIONS, IF DESIRED)
The Selections Tab in the Phase 2 user interface contains 4 options with search capabilities:

**Selections**  
(USE THE SEARCH ICON OR CLICK ANY HEADER AND BEGIN TYPING SEARCH CRITERIA)

**Time Selections**

**Advance Filter**

**User Metrics**

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**Questions?**  
For help with Spend Analytics, please contact your Campus Primary Representative.
In this scenario, we will answer the questions:

- What is the addressable spend breakdown for my Campus?
- What is a supplier’s addressable spend for a specific UC category group?
- How do I determine which UC category a purchased item belongs to?

**STEP 1** Make the desired Campus selection in the Selections Overview section (UCM).

**STEP 2** Click the Custom Reports tab to begin selecting filters for your report.

**STEP 3** Select the desired Dimensions (Tier 1 – UC Spend Type, Tier 2 – UC Procurement Scope and Tier 3 – UC Category Group) and Metric (Spend). Once you select a metric, the report will begin populating. (You may have to scroll to the right and click the Fast Change icon to view the full report.)

The report will display the different buckets of addressable and non-addressable spend related to your selection (UCM).

**STEP 4** To limit the report to addressable spend only, click the Selections tab.

**STEP 5** On the Selections tab, select the drop-down arrow next to Tier 1 – UC Spend Type and select “Addressable”.

**STEP 6** Return to the Custom Reports tab. The non-addressable spend will be removed from the report. The report will display a breakdown of addressable spend for the campus selected (UCM).
In the next example, we will determine the Supplier Spend within each UC Category Group.

**STEP 1**  On the Dashboard tab, in the Search Box enter the Supplier Name (Grainger). Make your selection from the Supplier Normalized Name field (GRAINGER INC).

**STEP 2**  Click the Custom Reports tab to begin selecting filters for your report.

**STEP 3**  Select the desired Dimensions (Supplier Normalized Name, Tier 1 – UC Spend Type, Tier 2 – UC Procurement Scope and Tier 3 – UC Category Group, and Supplier Normalized Name) and Metric (Spend). Once you select a metric, the report will begin populating. (You may have to scroll to the right and click the Fast Change icon to view the full report.)

The report will display the different buckets of addressable spend for the selected Supplier (Grainger).

In the final scenario we will determine which UC category group a purchased item belongs in.

**STEP 1**  On the Dashboard tab, in the Search Box enter all or part of the item name (desking). Make your selection from the UNSPSC Level 3 field (22 – Desking systems).

**STEP 2**  Click the Custom Reports tab to begin selecting filters for your report.
STEP 3   Select the desired **Dimensions** (UNSPSC Level 1, UNSPSC Level 2, UNSPSC Level 3, Supplier Normalized Name, Tier 1 – UC Spend Type, Tier 2 – UC Procurement Scope and Tier 3 – UC Category Group) and **Metric** (Spend). Once you select a metric, the report will begin populating.

The report will display the category group the purchased item (**desking systems**) belongs in (**MRO**).
In this scenario, we will answer the question: **How can I generate a report of Purchase Orders, Invoices or Supplier spend that falls within specific dollar amounts?**

**STEP 1** Make the desired data selections in the Selections Overview section (FY 2013).

**STEP 2** Click the Advanced Filter tab. This tab is used to view supplier, invoice and PO data that falls within certain customizable limits.

**STEP 3** In this example, we are going to view POs that fall within certain dollar ranges. Change the values in the PO Limits container to reflect the desired limits ($1,000 to $5,000, $5,000 to $100,000 and $100,000 to $1,000,000). To change the values, highlight the existing dollar limit, type the new limit and hit “Enter.”

**STEP 4** Double-click the Fact Sheets icon. (*Note: To ensure the process completes as quickly as possible, it is important to have your location and time selections made before rendering the Fact Sheets. The application calculates the request dynamically, so larger data sets will take longer to process.)

**Step 5** In the expanded Fact Sheets section, click the PO Fact Sheet column heading to review the total spend data within each of the PO Limits (PO Count, % of POs, etc.).
**Scenario: Advanced Filter**

**Step 6** Generate a report of Suppliers whose spend falls within given dollar thresholds by changing the values within the **Supplier Limits** container to reflect the desired limits ($1,000 to $5,000, $5,000 to $100,000 and $100,000 to $1,000,000).

**Step 7** Click the **Supplier Fact Sheet** column heading to review the total spend within each of the Supplier Limits (Supplier Count, % of Suppliers, etc.).

**Step 8** For a detailed report of the suppliers that fall within a specific threshold, click the desired **Criteria** (dollar limit).

**Step 8** Click the **Custom Reports** tab.

**Step 9** Select the desired **Dimension** (Supplier Normalized Name) and **Metric** (Spend).

Once you select a metric, the report will begin populating (you may need to select the **Fast Change** icon to view the full report).

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Questions? For help with Spend Analytics, please contact your **Campus Primary Rep (CPR)**.
In this scenario, we will answer the question: **How can I quickly view multiple Purchase Order or Invoice details in a single place?**

**STEP 1**  Click the **Selections** tab.

In addition to the traditional **Search Box** in the **Selections Overview** section, the **Selections Tab** gives you access to two additional search fields:

**Advanced Search**: Looks through every single data attribute in the system (57 total) ranging from **Account Name** through **UNSPSC Level 4**.

**Organizational Search**: Looks through organizational data such as **Fund**, **Account** and **Department**.

**Month – Year**: Additional date search functionality provides the flexibility to select multiple date-ranges for your search (Double click to expand and **Ctrl + Click** to make multiple selections).
STEP 2: To search for specific Purchase Order details, type the PO number into the traditional Search Box in the Selections Overview section (10487497) and make your selection from the PO Number field. Alternatively, you can click on the down arrow or in the box directly to the right of the PO Number field and then type your selection.

Any available unique attributes for the PO will be displayed.

STEP 3: Use the drop-down arrow (▼) in any of the attribute fields to change your selection. After you click the drop-down arrow (▼), right-click your mouse for additional menu options.

STEP 4: Click “Search” and an empty search field will appear where you can begin typing your next selection. Upon making your selection, all associated attributes will update based on what was chosen.
In this scenario, we will answer the question: How can I analyze a supplier’s spend for each campus, taking into account that each campus uses a different variation of the supplier name?

**STEP 1** In the **Search Box** enter the **Supplier Name** (VWR). In the Supplier Name field, you can see the different variations of the supplier name used across the campuses.

**STEP 2** Make your selection from the **Supplier Normalized Name** field (VWR INTERNATIONAL, INC.)

The total spend for the supplier normalized name displays in the **Overview** section, and spend details for the different variations of the name are displayed in the **Spend by Supplier** container.

**STEP 3** To generate a report that shows spend for each of the different supplier names by campus, select the **Custom Reports** tab.
STEP 4 Enter your selections into the Selections Overview (FY2013, FQ4).

STEP 5 Enter the desired Dimensions (Campus, Supplier Normalized Name and Supplier Name) and Metric (Spend). Once you select a metric, the report will begin populating.

STEP 6 To see data for each Campus displayed in separate columns, place your cursor over the Campus column header, hold down the left-click on your mouse and drag the Campus column header into the gray area above the Spend column. A green bar will indicate the insertion point for the new columns. Release the left-click on your mouse.

Additional columns are added to reflect the total spend for the supplier, broken down by all of the different Supplier Names used by the campuses.
In this scenario, we will answer the question: **How can I determine what percentage of a supplier’s total spend is allocated to a specific commodity?**

**STEP 1** Click the Category Analysis tab.

Before any selections are made, the **Classification** section will display the **Spend** and **Percentage Total** of systemwide spend for each commodity (UNSPSC Level 1); the **Supplier Grouping** section will display the **Spend** and **Percentage Total** for each supplier.

**STEP 2** To narrow the results, make your selections using the Search box in the **Selections Overview**. Type the desired supplier name into the **Search** box, click the + to expand the results in the **Supplier Normalized Name** field and make your selection (Dell, Inc.). Also select the desired **Campus** (UCLA) and **Date range** (Calendar Year 2013).
The results in the Classification section will be filtered to display the different UNSPSC Level 1 commodities provided by the selected supplier, with the Spend and Percentage Total within each commodity.

STEP 3 Click the + to expand the results to display UNSPSC Level 2, Level 3 and/or Level 4 classification spend.

In the next example, we will start our search by narrowing our query to a specific commodity, Notebook Computers, using the UNSPSC classification and then analyze our supplier landscape for this type of product.
**Scenario: Category Analysis**

**Page 3**

**STEP 1** Enter **Notebook Computers** in the Search box in the Selections Overview. Make your selection from the UNSPSC Level 4 field (03 – Notebook computers).

The **Classification** section will display the total spend for the commodity.

**Step 2** Click the **to expand** Level 1 (43), Level 2 (21) and Level 3 (15). The individual commodity Level 4 (03 Notebook Computers) will be displayed.

The **Supplier Grouping** section will display a list of **Suppliers** providing this commodity, the total **Spend** with each supplier, and each supplier’s **Percentage** of total spend for this commodity.

**Questions?** For help with Spend Analytics, please contact your Campus Primary Rep (CPR).
In this scenario, we will answer the question: **How can I measure individual and campus adoption of the Spend Analytics tool?**

A **User Metrics** tab has been added to the tool to provide visibility into usage. This tab is available to all users and can help gauge adoption and support decision making over user license allocation.

**STEP 1** Click the **User Metrics** tab. The page will default to the **Overview** which contains **Total Users** (number of unique users that logged into system), **Total Monthly Logins** (cumulative number of logins to the system) and **Number of Login Days** (cumulative number of days with at least one login to the system).

Specific location and date range selections can be made using the **Selections Overview** on the left hand side.

**STEP 2** Click **Campus Comparison**. This page contains a Pie Chart displaying the total monthly logins by campus. **Note:** The color coding relates to the usage numbers; the highest usage number will always display green.
Scenario: User Metrics

**STEP 3** Click **Monthly Usage**. This page contains a Line Chart that plots out the total number of logins for a specific time period and campus.

**STEP 4** Click **User Details**. The page shows overall logins by user for a specific time period and campus. Use the + in the reporting month field to drill down to individual user login details.

Questions? For help with Spend Analytics, please contact your Campus Primary Rep (CPR).
In this scenario, we will answer the question: **How do I create a custom report showing spend for the top 100 UC suppliers, by Campus?**

To create a custom report, you can navigate directly to the Custom Reports tab where you can make your selections, including Dimensions and Metrics all in the same place.

**STEP 1**  Click Custom Reports tab to begin selecting the filters for your report.

**STEP 2**  Select the desired Year (FY12), Dimension (Supplier Normalized Name) and Metric (Spend). Once you select a metric, the report will begin populating.

The report will display the total spend by supplier in descending order for FY12.
STEP 3  
To see a breakdown of the spend by quarter, select the **Quarterly** trend in the **Select Time** field. Additional columns will be added to the report to reflect the total spend by supplier for each quarter in the fiscal year.

The **Custom Reports** functionality allows you to add and remove selections until you get the desired data set for your report.

STEP 4  
Click **No Trending** trend in the **Select Time** field. This will remove the quarterly trend columns and the report will return to total spend by supplier for the fiscal year.

The display of the **Custom Report** defaults into what is known as a “**straight table**” view. In this initial view you can click any of the data elements and drill down for more information, but you cannot highlight /select multiple items in the straight table.

In order to highlight / select multiple items, click the **Fast-Change Icon** to change the display type to a “**pivot table**” view. (Depending on the number of selections you have made, clicking the Fast Change may not change look of table; only the functionality.)

STEP 5  
Click the fast change icon in the upper right corner of your report to switch to a “**pivot table**” view (you may have to scroll to the right to see the fast-change icon).
In the “pivot table” view, you can use your mouse to highlight an entire section of data to include in your report. If you want to limit your report to just the top 100 suppliers, use your mouse to highlight 100 rows of data.

Note: Your mouse must have a scroll wheel or track ball in order to use this functionality.

STEP 6   Position your cursor in the first cell in the Supplier Normalized Name column, left-click and drag your mouse to highlight the selection. At the end of the screen, do not release the left-click on your mouse. Instead, while holding down the left-click, use another finger to roll the scroll wheel and continue the selection.

Note: Scroll slowly and observe the rows turning green as they are included in your selection. If your scrolling highlights only a single row of data at a time, click the Fast Change icon again to toggle back to “pivot table” view and repeat Step 6.

Your selection will be complete when all desired rows are highlighted. Lift your finger to release the left-click on your mouse.
Scenario: Creating a Custom Report

The **Selections Overview** on the left will display the total spend for the suppliers contained in your selection and the report will display the suppliers in order of descending total spend.

**STEP 7** Click the **Fast Change** icon to return to the “straight-table” view.

Now you can begin adding additional **Dimension(s)** and/or **Metric(s)** to your report for the selected suppliers.

**STEP 8** Select the **“Campus” Dimension** for a breakdown of the total spend by campus for the selected suppliers. **Note** the additional “Campus” column added to your report.

**STEP 9** To see data for each **Campus** displayed in separate columns, place your cursor over the **Campus** column header, hold down the left-click on your mouse and drag the **Campus** column header into the gray area above the **Spend** column. A green bar will indicate the insertion point for the new columns. Release the left-click on your mouse.

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**Questions?** For help with Spend Analytics, please contact your [Campus Primary Rep (CPR)](mailto:).
Additional columns are added to reflect the total spend by the selected 100 suppliers for each campus.

**STEP 10** To send your report to Excel, position your cursor away from any data, right-click your mouse and select Send to Excel.
Scenario: Search Functionality

In this scenario, we will answer the question: **What are the advanced ways I can use the Search Box in the Selections Overview to find products?**

The Search Box can be used to identify and select all lines items containing a specific term. In this example we will search PO line descriptions for the keyword “recycle.”

**STEP 1** On the **Dashboard** tab, type the keyword into the **Search Box** and select the **+** to expand the results in the **PO Line Description** field.

**STEP 2** After you expand the section, click the **PO Line Description** heading.

Review the **Current Selections** box which now reflects the number of PO line descriptions containing the keyword (1735).

**STEP 3** Select the **Custom Reports** tab to generate a report of the items.

Questions? For help with Spend Analytics, please contact your **Campus Primary Rep (CPR)**.
**Scenario: Search Functionality**

**STEP 4** On the **Custom Reports** tab select the checkbox next to the desired **Dimensions** (Campus, PO Line Description) and **Metrics** (Spend). The report will begin to populate when at least one dimension *and* one metric are selected.

![Select Dimension(s)](image)

![Select Metric(s)](image)

**STEP 5** The report will default in a collapsed view (default). Click the **Fast Change icon** to expand the report to view all of the selected fields.

![Invoice Line Descriptions](image)

In the next example, the Search Box will be used to target spend for a multiple word item. We will search Invoice Line Descriptions for “electrical gloves” spend.

**STEP 1** On the **Dashboard** tab, type the first keyword into the **Search Box** and select the ✪ to expand the results in the **Invoice Line Description** field.

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**Questions?** For help with Spend Analytics, please contact your [Campus Primary Rep (CPR)](mailto:campusprimaryrep@uc.edu).
Scenario: Search Functionality

**STEP 2** After you expand the section, click the desired field name to select all data lines.

Review the **Current Selections** box which will reflect the number of line descriptions containing the first keyword (1655).

**STEP 3** Type the second keyword into the **Search Box** and select the **Invoice Line Description** heading. This will show the items that contain both words.

**STEP 4** After you expand the section, click the **Invoice Line Description** heading.

Questions? For help with Spend Analytics, please contact your [Campus Primary Rep (CPR)](mailto:campusprimaryrep@california.edu).
Review the Current Selections box which now reflects the number of data line descriptions containing both of the keywords (11).

**STEP 5** Select the Custom Reports tab to generate a report of the items.

**STEP 6** On the Custom Reports tab select the checkbox next to the desired Dimensions (Campus, Invoice Line Description) and Metrics (Spend, Invoice Quantity). The report will begin to populate when at least one dimension and one metric are selected.

**STEP 7** The report will default in a collapsed view (default). Click the Fast Change icon to expand the report to view all of the selected metrics.

<table>
<thead>
<tr>
<th>Campus</th>
<th>Invoice Line Description</th>
<th>Spend</th>
<th>Invoice Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCLA</td>
<td>24 ELECTRICAL PROTECTION RUBBER GLOVES SIZE 8</td>
<td>44.40</td>
<td>1.00</td>
</tr>
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<td>UCLA</td>
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<td>132.78</td>
<td>2.00</td>
</tr>
<tr>
<td>UCLA</td>
<td>INSULATED ELECTRICAL GLOVES SALISBURY SIZE 9 BLACK</td>
<td>1,688.42</td>
<td>20.00</td>
</tr>
<tr>
<td>UCLA</td>
<td>INSULATED ELECTRICAL GLOVES SALISBURY SIZE 10 BLACK</td>
<td>1,688.42</td>
<td>20.00</td>
</tr>
<tr>
<td>UCLA</td>
<td>INSULATED ELECTRICAL GLOVES SALISBURY SIZE 11 BLACK</td>
<td>844.20</td>
<td>10.00</td>
</tr>
<tr>
<td>UCM</td>
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<td>205.35</td>
<td>0.00</td>
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<tr>
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<td>245.77</td>
<td>4.00</td>
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</tr>
<tr>
<td>UCSD</td>
<td>Electrical Protection Gloves and Le</td>
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<td>5.00</td>
</tr>
</tbody>
</table>

Questions? For help with Spend Analytics, please contact your Campus Primary Rep (CPR).
Scenario: Who is Buying (Department)?

In this scenario, we will answer the question: Who is Buying (Department)?

**STEP 1** On the Dashboard tab, select the desired campus, and date range.

**STEP 2** Click the Selections tab.

**STEP 3** Use the Organizational Search field to search a particular department if the Organizational Level is unknown. Enter the first few characters of the Organizational Unit and select the appropriate name and hierarchy level from the list. The Org Level fields will auto populate to show the entire hierarchy.

Questions? For help with Spend Analytics, please contact your Campus Primary Representative.
Scenario: Who is Buying (Department)?

If the Organizational level is known, you may select the appropriate Org Level field (Org Level 1-7), enter the first few characters and select the appropriate name rather than using the Organizational Search field. After a selection is chosen, the Org Level fields will auto populate to show the entire hierarchy.

**STEP 4** Return to the Dashboard where you will be able to see details about the total spend for the selected Organizational Unit, supplier names and classification of items purchased. Use the 🔍 to drill down the Organizational Level hierarchy to see a breakdown of the total spend at each level.

Questions? For help with Spend Analytics, please contact your Campus Primary Representative.
Scenario: How Are We Buying?

In this scenario, we will answer the question: **How Are We Buying?**

**STEP 1** On the **Dashboard** tab, select the desired campus, and date range.

![Dashboard screenshot]

A breakdown of total spend by **Transaction Type** will be displayed in the 4th Container.

**STEP 2** Place your cursor in a colored section in the Pie Chart to see the **dollar amount** for that **Transaction Type**.

![Pie Chart screenshot]

**STEP 3** Click the **Transaction Type** tab.

Place your cursor in a colored section of the Pie Chart to see the **total count** for that **Transaction type**.

![Pie Chart screenshot]

Questions? For help with Spend Analytics, please contact your [Campus Primary Representative](mailto:campusprimaryrepresentative@university.edu).
Scenario: How Are We Buying?

This functionality can be used to see what transaction types are used within a specific commodity (shown) or with a specific supplier.
Scenario: Total Spend by Fund

In this scenario, we will answer the question: **What was our total spend for a particular fund?**

**STEP 1** On the **Dashboard** tab, select the desired campus, and date range.

**STEP 2** Click the **Selections** tab.

The current selection(s) will be highlighted in green.

**STEP 3** In the **Fund Name** field insert a keyword for the desired Fund. In this scenario, we will enter the keyword, “Cancer” and select the **Fund Name**: Breast Cancer Research.

Questions? For help with Spend Analytics, please contact your [Campus Primary Representative](#).
The Total Spend will display for the selected fund, as well as the Fund Number.

**Scenario: Total Spend by Fund**

**STEP 4** Click the **Dashboard** tab.

Details about the spend will be displayed, including spend by classification, Supplier names, and organizational unit details.

**Questions?** For help with Spend Analytics, please contact your [Campus Primary Representative](mailto:).
Scenario: Total Spend by Supplier

In this scenario, we will answer the question: **What was our total spend for a particular supplier?**

**STEP 1** On the **Dashboard** tab, select the desired campus and date range.

**STEP 2** In the **Search Box** enter the Supplier Name and make your selection from the **Supplier Normalized Name** field. 

**Note:** If **Supplier Name** field is used, the data returned is only applicable to that selected supplier only and will not include any spend data for that same supplier if there are variations on name spelling (e.g., IGM vs I.B.M.).

The total **Filtered Spend** for the selected Supplier will be displayed.

**STEP 3** Use the **Campus Comparison** feature to see how much other campuses have spent with this supplier. Use the horizontal scroll bar to view different campus data.

Questions? For help with Spend Analytics, please contact your **Campus Primary Representative**.
Scenario: What is Our Spend by Commodity?

In this scenario, we will answer the question: **What was our total spend for a specific commodity?**

**STEP 1** On the **Dashboard** tab, enter the product description or UNSPSC Code into the **Search Box** and make your selection from the list. Use lower level UNSPSC selections for more granular data.

The total spend for the selected commodity will be displayed. Additionally, the transaction details applicable to your query, such as supplier, organizational unit and transaction type data will be displayed.

**STEP 2** To determine the commodity spend for a specific campus, select the desired **Campus** and **Date Range**.

**STEP 3** Click the **Price Analysis** tab.

Questions? For help with Spend Analytics, please contact your [Campus Primary Representative](mailto:campusprimaryrepresentative@uc.edu).

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**Scenario: What is Our Spend by Commodity?**

**STEP 4** On the **Price Analysis** tab, select the checkbox next to the criteria you would like to see reported: **Dimensions** (UNSPSC Level, Supplier Normalized Name, Part Number) and **Metrics** (Quantity Ordered, Total Spend).

**STEP 5** Your data selections will be reported in columns on the right. The order of the columns can be changed by dragging and dropping the columns using the field headers, or expanded by dragging the column borders to the desired width.
Scenario: Selecting Multiple Suppliers or Commodities

In this scenario, we will answer the question: **How do I add multiple Suppliers or Commodities to my query?**

**STEP 1** On the **Dashboard** tab, select the desired campus, and date range.

**STEP 2** In the **Search Box** enter the first Supplier Name and Make your selection under **Supplier Normalized Name**.

The **Current Selections** box displays all of the selections in the current data set. In this example, the current selections include: **UCLA, FY2012, AIRGAS, INC**.

The black **Arrows** next to each selection can be used to add additional selections to the existing query (eg: Supplier, Classification, Organizational Unit, Fund, etc)

**STEP 3** To add an additional supplier, click the **Arrow** next to the existing normalized name. A list of additional suppliers will appear.

Questions? For help with Spend Analytics, please contact your **Campus Primary Rep (CPR)**.
**Scenario: Selecting Multiple Vendors or Commodities**

**STEP 4** To search the list for a specific supplier, begin typing the supplier name. **Note:** You will not see an input field for the supplier name until you begin typing.

**STEP 5** When you see the desired supplier name in the list, **hold down the Ctrl key and click the supplier name.** Using the Ctrl key will add the new supplier to the **Current Selections.** **Note:** If you click a supplier name without holding down the Ctrl key, you will delete the existing supplier selection and replace it with the new supplier.

**STEP 6** View your **Current Selections.** The dataset now includes both the original supplier and the new supplier.

**Reminder:** For an expanded view of your current selections, click the **Selections** icon on the **Toolbar** and a pop-up box will appear summarizing your selections.
Scenario: Spend by Purchasing Authority Limits

In this scenario, we will answer the question: What is our total spend within each purchasing authority limit?

**STEP 1** On the Dashboard tab, select the desired campus, and date range.

**STEP 2** Select the Advanced Filter tab. This tab is used to view supplier, invoice and PO data sorted into pre-established thresholds.

**STEP 3** To view total spend within each purchasing authority limit, change the values in the PO Limits container to the desired limits. To change the values, highlight the existing dollar limit, type the new limit and hit “Enter.”

**STEP 4** Double-click the Fact Sheets icon. (*Note: To ensure the process completes as quickly as possible, it is important to have your data selections made (Campus, Date Range, etc.) before rendering the Fact Sheets.*

Questions? For help with Spend Analytics, please contact your Campus Primary Rep (CPR).
Scenario: Spend by Purchasing Authority Limits

**STEP 5** In the expanded Fact Sheets section, you have the option to review Supplier Fact Sheet (default), Invoice Fact Sheet or PO Fact Sheet. Click the PO Fact Sheet column heading.

<table>
<thead>
<tr>
<th>Supplier Limits</th>
<th>Invoice Limits</th>
<th>PO Limits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lower Limit  =  $1,000</td>
<td>Lower Limit  =  $100</td>
<td>Lower Limit  =  $100</td>
</tr>
<tr>
<td>Limit 2  =  $10,000</td>
<td>Limit 2  =  $500</td>
<td>Limit 2  =  $500</td>
</tr>
<tr>
<td>Limit 3  =  $100,000</td>
<td>Limit 3  =  $1,000</td>
<td>Limit 3  =  $1,000</td>
</tr>
<tr>
<td>Upper Limit  =  $1,000,000</td>
<td>Upper Limit  =  $5,000</td>
<td>Upper Limit  =  $5,000</td>
</tr>
</tbody>
</table>

Due to the Fact Sheet Reports being run dynamically in the Spend Analytics tool, you may experience a slight delay as the report opens. We recommend that you make all your selections prior to running this report.

<table>
<thead>
<tr>
<th>Supplier Fact Sheet</th>
<th>Invoice Fact Sheet</th>
<th>PO Fact Sheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria</td>
<td>Supplier Count</td>
<td>% of Suppliers</td>
</tr>
<tr>
<td>1. &lt; $1,000</td>
<td>21,228</td>
<td>57.16%</td>
</tr>
<tr>
<td>2. &lt; $10,000</td>
<td>12,155</td>
<td>32.68%</td>
</tr>
<tr>
<td>3. &lt; $100,000</td>
<td>2,899</td>
<td>7.81%</td>
</tr>
<tr>
<td>4. &lt; $1,000,000</td>
<td>745</td>
<td>2.01%</td>
</tr>
<tr>
<td>5. &gt; $1,000,000</td>
<td>180</td>
<td>0.45%</td>
</tr>
</tbody>
</table>

**STEP 6** Review the total spend data for each purchasing authority limit: PO Count, Cumulative PO Count, % of Cumulative Pos and total Spend.

<table>
<thead>
<tr>
<th>PO Fact Sheet</th>
<th>Supplier Fact Sheet</th>
<th>Invoice Fact Sheet</th>
<th>PO Fact Sheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria</td>
<td>PO Count</td>
<td>% of POs</td>
<td>Cumulative PO Count</td>
</tr>
<tr>
<td>1. &lt; $4,999</td>
<td>85,553</td>
<td>97.42%</td>
<td>85,553</td>
</tr>
<tr>
<td>2. &lt; $9,999</td>
<td>774</td>
<td>0.88%</td>
<td>93,307</td>
</tr>
<tr>
<td>3. &lt; $49,999</td>
<td>947</td>
<td>1.08%</td>
<td>97,254</td>
</tr>
<tr>
<td>4. &lt; $50,000</td>
<td>1</td>
<td>0.00%</td>
<td>97,255</td>
</tr>
<tr>
<td>5. &gt; $50,000</td>
<td>345</td>
<td>0.62%</td>
<td>97,600</td>
</tr>
</tbody>
</table>

Questions? For help with Spend Analytics, please contact your [Campus Primary Rep (CPR)](mailto:).
In this scenario, we will answer the question: What is my spend profile for a specific UNSPSC category?

**STEP 1** On the Dashboard tab, select the desired campus, and date range.

**STEP 2** Select the Category Analysis tab. This tab is used to analyze spend by category.

**STEP 3** The page will default to display the Classification / Supplier Grouping. In the Classification section, locate the desired UNSPSC Level 1 (it may be necessary to use the vertical scroll bar on the right). Once you have located the desired Level 1, use the to drill down the UNSPSC levels until you get to the desired commodity where you can view the total spend.
Scenario: Spend for Specific UNSPSC Category

STEP 4   Click on Data Breakouts to view a breakdown of your selection by Transaction Type, Fund, Account, Department, Monthly (shown), Quarterly or Yearly. (Note: The breakout metric will default to Spend unless another metric is selected.)