Dashboard (Home Page)

1. **Tabs**: The user interface has six tabs: *Dashboard, Analysis, Selections, Diversity, Benefit Bank* and *Help Page*. Within these tabs you will have access to all Spend Analytics features and functionality.

2. **Data Type**: You can select from two Data Types: *Spend* (which includes AP and PCard data) or *PO Commitment* (funds committed but not spent). **Note**: The Data Type filter is only applicable on the Dashboard Tab view.

3. **Campus**: All campuses are included.

4. **Spend by UC Category**: This container 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 Normalized Payment Method**: This container reflects how funds were paid (ACH, Check, Travel Reimbursement, etc.) with the ability to drill down to specific campus payment methods. Choose between two views: *Spend by Normalized Payment Method* or *Transaction Count by Normalized Payment Method*.

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

The Analysis Tab user interface contains six data views: Classification and Supplier Grouping, Data Breakouts, Custom Reports, Price Analysis, Opportunity Assessment and Invoice/PO Details.

### Classification and Supplier Grouping

<table>
<thead>
<tr>
<th>Classification and Supplier Grouping</th>
<th>Data Breakouts</th>
<th>Custom Reports</th>
<th>Price Analysis</th>
<th>Opportunity Assessment</th>
<th>Invoice/PO Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Orders</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Unique</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Paid</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Data Breakouts (by Campus, Data Source or Payment Method)

#### Data Breakouts

- **Campus**
- **Data Source**
- **Payment Method**

### Custom Reports (Select Dimension and Metric to begin populating your report)

- **Select Dimension(s)**
  - Campus
  - Data Source
  - UNSPSC Level 1
  - UNSPSC Level 2
  - UNSPSC Level 3
  - UNSPSC Level 4
  - Tier 1 - UC Spend Tape
  - Tier 2 - UC Procurement
  - Tier 3 - Category Group
  - Supplier Normalized Id

- **Select Metric(s)**
  - Spend
  - PO Count
  - PO Commitment
  - Total
  - It Suppliers
  - UPI

### Price Analysis

- **Select Dimension(s)**
  - UNSPSC Level 1
  - UNSPSC Level 2
  - UNSPSC Level 3
  - UNSPSC Level 4
  - Supplier Normalized Id
  - Part Number
  - Item Description
  - UNSPSC
  - UNSPSC Level 1

- **Select Metric(s)**
  - Spend
  - PO Count
  - PO Commitment
  - Total
  - It Suppliers
  - UPI

Questions? For help with Spend Analytics, please contact your Campus Primary Representative.

JAN 2015
Analysis Tab (continued)

**Opportunity Assessment** (select from UC CATEGORY GROUPS)

**Invoice / PO Details** (enter invoice or PO number and click ∑ to render report; add dimensions, if desired)
# Selections Tab

The Selections Tab contains four options with search capabilities.

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

---

### Selections

<table>
<thead>
<tr>
<th>Categories</th>
<th>UNSPSC Level 1</th>
<th>UNSPSC Level 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Procurement</td>
<td>18. Food control products</td>
<td>41. Marketing and distribution</td>
</tr>
<tr>
<td>Organization</td>
<td>19. Marketing and distribution</td>
<td>42. Non-renewable Energy</td>
</tr>
<tr>
<td>Supplier</td>
<td>20. Non-renewable Energy</td>
<td>43. Professional engineering services</td>
</tr>
<tr>
<td>Invoice</td>
<td>44. Professional engineering services</td>
<td>45. Consumer and personal assistance</td>
</tr>
<tr>
<td>PO</td>
<td>46. Consumer and personal assistance</td>
<td>47. Management activities services</td>
</tr>
</tbody>
</table>

---

### Time Selections

<table>
<thead>
<tr>
<th>Month-Year</th>
<th>201311</th>
<th>201312</th>
<th>201401</th>
<th>201402</th>
<th>201403</th>
<th>201404</th>
<th>201405</th>
<th>201406</th>
<th>201407</th>
<th>201408</th>
<th>201409</th>
<th>201410</th>
<th>201411</th>
<th>201412</th>
</tr>
</thead>
</table>

---

### Advance Filter

- Supplier Limits
- Invoice Limits
- PO Limits

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### User Metrics

- Advanced Search
- Organizational Search

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**Questions?** For help with Spend Analytics, please contact your Campus Primary Representative.
Diversity Tab

The Diversity Tab contains four options:

- **Diverse Single Count Spend**
- **Diverse Data Breakouts**
- **Diverse Graphical Breakout**
- **Diverse Custom Reports**

**Diverse Single Count Spend**

**Diverse Data Breakouts**

**Diverse Graphical Breakout**

**Diverse Custom Reports** - A range of dimensions and metrics may be selected to create custom reports, as needed
Benefit Bank Tab

The Benefit Bank Tab contains four options:

**Benefit Analysis**

**Fiscal Year Benefit Breakouts**

**Benefit Graphical Breakout**

**Benefit Custom Reports** - A range of dimensions and metrics may be selected to create custom reports as needed.