The Quick Access Toolbar
Provides easy access to the commands you use most frequently.

- **Clear**: Clears all selections (CTRL+SHIFT+D)
- **Back Arrow**: Reverts to the preceding logical (selection) state
- **Forward Arrow**: Returns to the most recent data selection cleared
- **Lock**: Locks all current selections
- **Unlock**: Removes the lock applied to any selections
- **Selections**: A pop-up window will show current data selections
- **Bookmarks**: Save and name multiple complex data selections

**Tabs**
There are four primary tabs: Dashboard, Analysis, Selections and Help.

1) **Dashboard**: Upon login, the page will open on the Dashboard tab displaying systemwide spend data. You can filter the spend by campus, time period, etc. There is a single Dashboard for all users.

2) **Analysis**: The Analysis tab contains the following six sub-tabs:

- Classification and Supplier Grouping
- Data Breakouts
- Custom Reports
- Price Analysis
- Opportunity Assessment
- Invoice/PO Details

3) **Selections**: The Selections tab contains the following four sub-tabs:

- Selections
- Time Selections
- Advanced Filter
- User Metrics

4) **Help Page**: Links to additional reference documents, step-by-step analytics scenarios and technical support.

**Objects**

**Search Box**: Use the Search box to look for Invoice, PO, UC Category Groups or Supplier information. More advanced search options are available on the Selections Tab.

**Charts**: Spend Analytics allows you to view your data in an assortment of charts and graphs. The **fast change icon** allows you to toggle between different chart types: Pie Chart, Bar Chart or raw data.

**Date Range**: You can view calendar or fiscal data for a specified date range by highlighting the desired Month, Quarter or Year. Select multiple ranges using the CTRL key. The time range you have selected will be highlighted green, those available for further selection will be white, those shaded gray are non-applicable.

Questions? For help with Spend Analytics, please contact your Campus Primary Representative.
Current Selection: Details what data selections have been made. Clicking the Eraser icon will remove those criteria only, leaving the other selections. Clicking on the down arrow will allow you include additional values in your current selections. Right click any data element in the Current Selections box for additional options.

Making Selections

In most cases you will find it possible to make selections directly in the chart plot area by clicking individual values (bars, etc.) or by “painting” over a larger selection (see below).

- When painting, left-click and drag the mouse. The green raster indicates the selection until the mouse button is released.
- In a Pivot table, you can select a value by double-clicking it.

- Click the + icon to expand that group. The – icon will collapse it. A right click on most data elements in a list box will provide additional options.

Bookmarks & Sharing

Use Bookmarks to preserve input field values and/or layout states for future reference. Click Bookmark from the Quick Access Toolbar and select Add Bookmark. Note: Do not click the checkbox, ‘Share Bookmark with Other Users’ as this is an administrative function only.

Exporting Data

Please only export the data required for your immediate analysis. Exporting can be a lengthy process due to internet connectivity speeds; please be patient. If large data exports are necessary, please contact your CPR. Note: If using Excel 2003, please be mindful of the 65K row limit when exporting.

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