

## Procurement Dashboards <sup>[1]</sup>

### What are the Procurement Dashboards?

Knowing how your department spends money can help identify how you can save money. Procurement Dashboards give you an interactive summary of your department's spending - consolidating data from several sources, including CU Marketplace invoices, Concur expense transactions, and airfare - in an easy to use and customizable format.

### What Can You Learn From the Dashboards?

**Procurement Spend Summary:** Provides a high-level breakdown of your Marketplace invoices, Procurement Card, Travel Card, and Reimbursements, showing how you spent money.

**Concur Expense Detail:** Provides a breakdown of your department's Concur expense data, with the ability to drill down into the data by employee, expense type, or supplier.??

**Air Travel Summary:** Provides a breakdown of your department's air travel spend, with the ability to filter by various booking details.

**Taxonomy:** Gives you the ability to look at Marketplace and Procurement Card data, filtering through 6 levels of product categorization.

### Watch the Video

## IT Procurement Demo

## Key Notes

### Accessing the Dashboards

You need a license for the Tableau software in order to access the dashboards. To request a license/access, Email: [PSCBusinessIntelligence@cu.edu](mailto:PSCBusinessIntelligence@cu.edu) <sup>[2]</sup>

When you receive confirmation that you've been given a license for Tableau and access to the dashboards, then:

1. Open Tableau: <https://viz.cu.edu> <sup>[3]</sup>. (*You'll need to be connected to VPN.*)
2. Select your campus.
3. Enter your portal credentials (CU username and password) and click **Submit**.
4. In Tableau, use the menu on the left to click **Explore**.
5. Click **PSC > Procurement Spend Dashboards > Procurement Spend Dashboards**.

6. From the View tab of the Procurement Spend Dashboards folder, you'll see all the dashboards available for your use. **Note** - Click the star next to the Procurement Spend Dashboards folder, or next to any of the individual dashboards, to save it as a Favorite. Access saved dashboards using the Favorites icon on the left of the screen.
7. Click on a dashboard to open it. Depending on your user permissions, the dashboard will either show information for your department (Admin, Manager/Supervisor, & Director levels) or for all departments (Executive level).

## Using the Dashboards

Start by logging into Tableau using your CU email address. (See Accessing the Dashboards, above.) Click Explore and navigate to the dashboards.

### General Notes

It can sometimes take a few minutes for the dashboard data to load.

Each dashboard helps you tune into a different section of procurement spend info, but they're also connected. The Procurement Spend Summary, Expense Detail, and Taxonomy dashboards are all driven from the same data set. So, if you're filtering on one dashboard, the other dashboards are automatically being filtered with the same criteria.

There are two ways to filter through information on each dashboard: (1) Click on the visuals, and (2) Use the filters on the right. We recommend you click the visuals to filter down to where you want to be, then use the remaining filters on the right to further refine your information.

### Procurement Spend Summary

The Procurement Spend Summary provides a high-level breakdown of your Marketplace invoices, Procurement Card, Travel Card, and Reimbursements. This dashboard tells you how much you're spending, how you're spending, with whom you're spending, what funds you're spending, who is doing the most spending, and a comparison of what that spending looks like from quarter to quarter. To filter through information: (1) Click on the visuals, and (2) Use the filters on the right.

This dashboard can be used to monitor spend activities and drive decisions. Let's say you want to make sure your department purchasers are being compliant about the different purchasing methods, specifically you want to make sure they are using their Procurement Cards only for allowable purchases. You may be able to identify opportunities for procurement training and communication within your department.

### Concur Expense Detail

The Concur Expense Detail provides a breakdown of your department's Concur expense data, with the ability to drill down into the data by employee, expense type, or supplier. To filter through information: (1) Click on the visuals, and (2) Use the filters on the right.

This dashboard can help highlight opportunities to steer the department to the most appropriate purchasing options, potentially saving money by driving purchases to CU Marketplace. You can also use the Concur Expense Detail dashboard to analyze trends in

expense data and identify and address unallowable purchases.

## **Air Travel Summary**

The Air Travel Summary provides a breakdown of your department's air travel spend, with the ability to filter by various booking details. To filter through information: (1) Click on the visuals, and (2) Use the filters on the right. What you learn about how your department spends money on travel may help to identify areas of potential savings -- and ascertain peak travel periods for your department team members.

## **Taxonomy Dashboards**

There are several Taxonomy dashboards. They give you the ability to look at Marketplace and Procurement Card data, while filtering through several levels of product categorization. Use the visuals first, and then use the filters on the right to get even more detailed information. Some ways you might use the Taxonomy Dashboards include: to identify opportunities for supplier consolidation, and to determine the supplier pool for each commodity .

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**Source URL:**<https://www.cu.edu/psc/training/procurement-dashboards>

### **Links**

[1] <https://www.cu.edu/psc/training/procurement-dashboards> [2] <mailto:PSCBusinessIntelligence@cu.edu>

[3] <https://viz.cu.edu>