uctug

University of California Tableau User Group (TUG)

Hosted By:
UC Office of the President
Procurement Services / Analytics & Reporting
07-14-17

Agenda

- ☐ Welcome & Introductions
- ☐ Analytics & Reporting (Tim Loomas)
- ☐ Announcements:
  - ❖ Tableau Conference 2017
- ☐ Product Demonstrations:
  - ❖ Data Validation / Control Charts (Neil Kronenthal)
  - ❖ Supplier Reporting (Jacquelyn Johnson)
  - ❖ IT Peripherals Program (Neil Kronenthal)
- ☐ Questions
- ☐ Next Meeting

Analytics & Reporting

- UCOP Procurement Services Analytics Team
    - Who are we?
    - What do we do?
    - How do we use Tableau?

- Where are we going?
    - Data
    - Visualizations

TC 17 - Mandalay Bay Hotel / Las Vegas

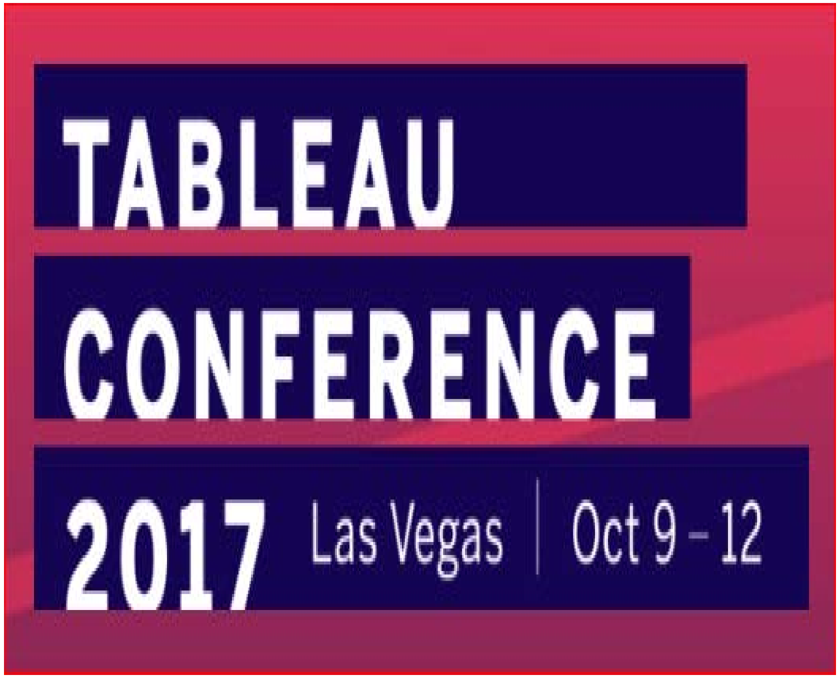
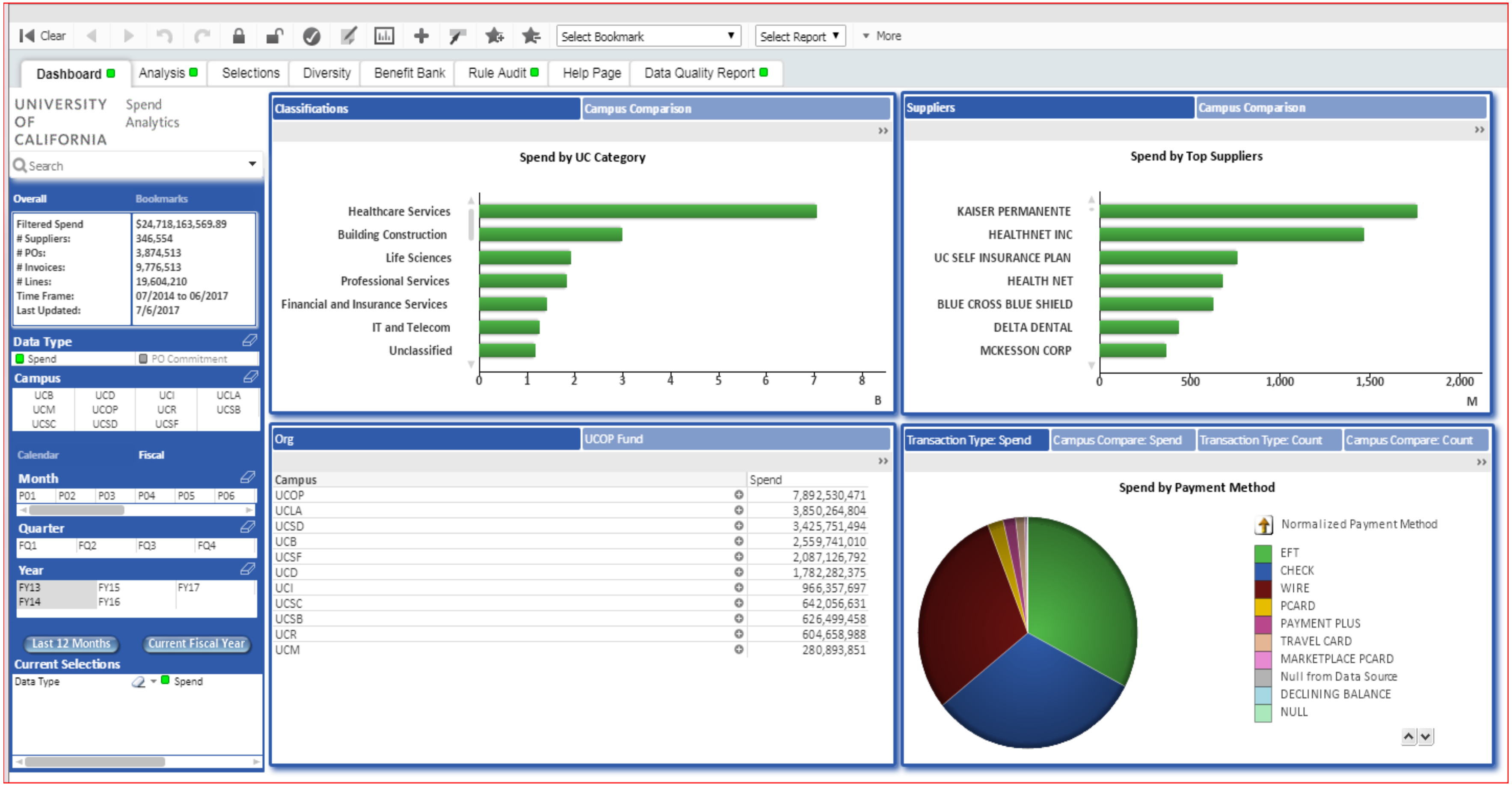


TABLEAU
CONFERENCE
2017
Las Vegas
Oct 9 - 12

- Higher Education Discount = $500 for a best rate of $1,095
- Enter code “**EDUVEGASTC17”** to receive best rate
- Register @ http://tc17.tableau.com/

Spend Analytics Data Quality / Control Charts

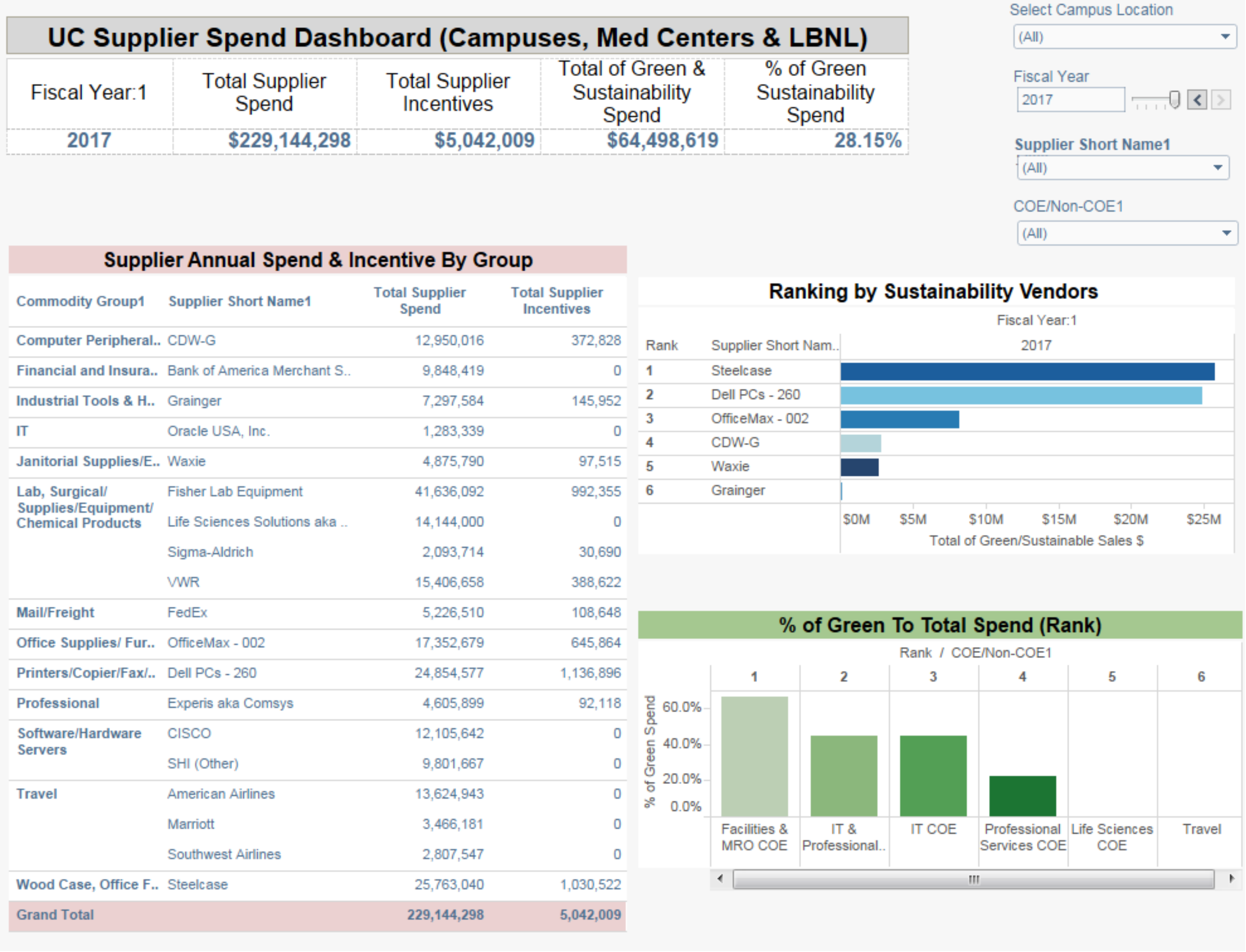

Clear
Select Bookmark
Select Report
More
Dashboard
Analysis
Selections
Diversity
Benefit Bank
Rule Audit
Help Page
Data Quality Report
UNIVERSITY OF CALIFORNIA
Spend Analytics
Search
Overall
Bookmarks
Data Type
Spend
PO Commitment
Campus
UCB
UCD
UCI
UCLA
UCM
UCOP
UCR
UCSB
UCSC
UCSD
UCSF
Calendar
Fiscal
Month
P01
P02
P03
P04
P05
P06
Quarter
FQ1
FQ2
FQ3
FQ4
Year
FY13
FY14
FY15
FY16
FY17
Last 12 Months
Current Fiscal Year
Current Selections
Classifications
Campus Comparison
Spend by UC Category
Healthcare Services
Building Construction
Life Sciences
Professional Services
Financial and Insurance Services
IT and Telecom
Unclassified
0
1
2
3
4
5
6
7
8
B
Suppliers
Campus Comparison
Spend by Top Suppliers
KAISER PERMANENTE
HEALTHNET INC
UC SELF INSURANCE PLAN
HEALTH NET
BLUE CROSS BLUE SHIELD
DELTA DENTAL
MCKESSON CORP
0
500
1,000
1,500
2,000
M
Org
UCOP Fund
Transaction Type: Spend
Campus Compare: Spend
Transaction Type: Count
Campus Compare: Count
Spend by Payment Method
Normalized Payment Method
EFT
CHECK
WIRE
PCARD
PAYMENT PLUS
TRAVEL CARD
MARKETPLACE PCARD
Null from Data Source
DECLINING BALANCE
NULL

Filtered Spend	$24,718,163,569.89
# Suppliers:	346,554
# POs:	3,874,513
# Invoices:	9,776,513
# Lines:	19,604,210
Time Frame:	07/2014 to 06/2017
Last Updated:	7/6/2017

Data Type: Spend

Campus	Spend
UCOP	7,892,530,471
UCLA	3,850,264,804
UCSD	3,425,751,494
UCB	2,559,741,010
UCSF	2,087,126,792
UCD	1,782,282,375
UCI	966,357,697
UCSC	642,056,631
UCSB	626,499,458
UCR	604,658,988
UCM	280,893,851

Supplier Reporting



UC Supplier Spend Dashboard (Campuses, Med Centers & LBNL)

Fiscal Year:1	Total Supplier Spend	Total Supplier Incentives	Total of Green & Sustainability Spend	% of Green Sustainability Spend
2017	$229,144,298	$5,042,009	$64,498,619	28.15%

Select Campus Location: (All)

Fiscal Year: 2017

Supplier Short Name1: (All)

COE/Non-COE1: (All)

Supplier Annual Spend & Incentive By Group

Commodity Group1	Supplier Short Name1	Total Supplier Spend	Total Supplier Incentives
Computer Peripheral..	CDW-G	12,950,016	372,828
Financial and Insura..	Bank of America Merchant S..	9,848,419	0
Industrial Tools & H..	Grainger	7,297,584	145,952
IT	Oracle USA, Inc.	1,283,339	0
Janitorial Supplies/E..	Waxie	4,875,790	97,515
Lab, Surgical/ Supplies/Equipment/ Chemical Products	Fisher Lab Equipment	41,636,092	992,355
	Life Sciences Solutions aka ..	14,144,000	0
	Sigma-Aldrich	2,093,714	30,690
	VWR	15,406,658	388,622
Mail/Freight	FedEx	5,226,510	108,648
Office Supplies/ Fur..	OfficeMax - 002	17,352,679	645,864
Printers/Copier/Fax/..	Dell PCs - 260	24,854,577	1,136,896
Professional	Experis aka Comsys	4,605,899	92,118
Software/Hardware Servers	CISCO	12,105,642	0
	SHI (Other)	9,801,667	0
Travel	American Airlines	13,624,943	0
	Marriott	3,466,181	0
	Southwest Airlines	2,807,547	0
Wood Case, Office F..	Steelcase	25,763,040	1,030,522
Grand Total		**229,144,298**	**5,042,009**

Ranking by Sustainability Vendors

Fiscal Year:1 2017

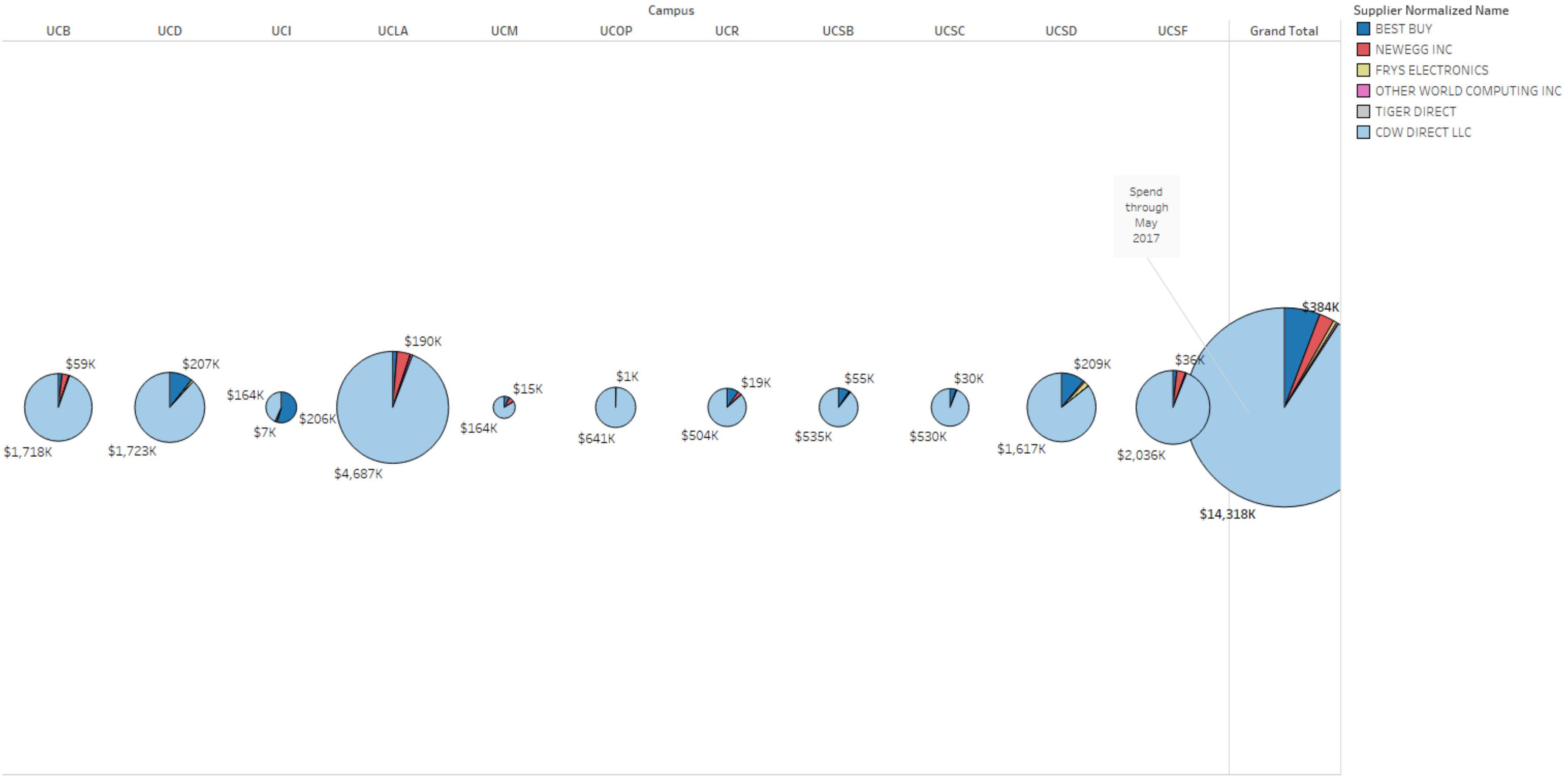
Rank	Supplier Short Nam..
1	Steelcase
2	Dell PCs - 260
3	OfficeMax - 002
4	CDW-G
5	Waxie
6	Grainger

$0M
$5M
$10M
$15M
$20M
$25M
Total of Green/Sustainable Sales $

% of Green To Total Spend (Rank)

Rank / COE/Non-COE1
1
2
3
4
5
6
% of Green Spend
60.0%
40.0%
20.0%
0.0%
Facilities & MRO COE
IT & Professional..
IT COE
Professional Services COE
Life Sciences COE
Travel

IT Peripherals Program



Campus Pie Chart / FY 2017

Spend through May 2017

Q
A