

University of California Tableau User Group (TUG)

Hosted by:
UCOP Procurement, Analytics &
Reporting
2-9-18

Agenda

- ❑ Welcome & Introductions

- ❑ Procurement Data
 - Environment
 - Approach

- ❑ Product Demonstrations:
 - Spend Dashboard
 - Sourcing Pipeline + Benefit Bank

- ❑ Questions

- ❑ Next Meeting

Procurement Source Data

❑ MS SQL Server

- Extract from Spend Analysis platform
 - Spend Radar retired 2/4/18
 - CalUSource Spend live on 2/5/18
- Price Files
 - Extracted from UBuy eCommerce system
 - Analyzed on SQL Server; presented in Tableau
- Extract from Benefit Bank
 - Re-shaped to ease querying and improve performance

❑ SharePoint

- Strategic Sourcing Pipeline
 - Includes forecast of Benefit for in-progress sourcing events
- Price File acceptance criteria

Approach to the Data

- ❑ Build with expanded scale in mind
- ❑ Assume the data will be reused
- ❑ Allow the “job to be done” to drive the selection of the tool(s)
 - SharePoint enables collaboration regardless of location
 - The SharePoint data entry form is simple which drove adoption
 - For the Sourcing Pipeline the job was collaboration
- ❑ Continue searching for ways to connect the data
 - Connecting SharePoint to SQL using Access
 - Access enables querying of a SharePoint list
 - Once in Access SharePoint and SQL data can be blended
 - Still hoping for a better solution

Campus-Level Spend

How much did we spend?
What did we buy?
Where are our suppliers?

Combining Procurement Data

Prototype visualization blending data from multiple sources





Next Meeting

March 9, 2018 at 3:00 PM (PST)