University of California Tableau User Group (TUG)

Hosted by:
Tim Loomas, UC Procurement Services
Agenda

- Welcome / Introductions
- UC Procurement Services
  - Using data to drive process improvements
- Tableau
  - What’s new?
- Resources
- Q&A
UC Procurement Services

Measuring for Change
Change is inevitable, change will always happen, but you have to apply direction to change, and that's when it's progress.

Doug Baldwin
Using data to drive process improvements

❖ December 2016
  ❖ SharePoint hosts five separate Excel files
  ❖ 15+ Commodity Managers individually update their projects (alternating weeks)
  ❖ Analytics consolidates the separate sheets into one
    ❖ All but impossible to extract data from the final sheet

❖ Today
  ❖ Commodity Managers each maintain their own projects on a SharePoint list (continuously)
  ❖ Information captured as data which facilitates reporting
    ❖ Automatically updates daily
## Variability ➔ Difficulties

<table>
<thead>
<tr>
<th>Sourcing Project</th>
<th>Project Lead</th>
<th>Status</th>
<th>Project Initiated</th>
<th>Core Team Identified</th>
<th>Preliminary Business Case Approved</th>
<th>Final Business Case Approved</th>
<th>Signed New Agreement</th>
<th>Contract Term</th>
<th>Total Annual Spend ($ Millions)</th>
<th>Total Annual Benefit ($ Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Automation Systems</td>
<td>FERREIRA</td>
<td>On Track</td>
<td>2/4/16</td>
<td>6/23/16</td>
<td>12/6/16</td>
<td>5/2/17</td>
<td>6/1/17</td>
<td>5</td>
<td>$3.00</td>
<td>$0.30</td>
</tr>
<tr>
<td>Elevator Maintenance</td>
<td>FERREIRA</td>
<td>On Track</td>
<td>3/7/16</td>
<td>9/3/16</td>
<td>3/13/17</td>
<td>6/12/17</td>
<td>7/3/17</td>
<td>5</td>
<td>$8.00</td>
<td>$1.00</td>
</tr>
<tr>
<td>CareShare</td>
<td>MEADOWS</td>
<td>On Track</td>
<td>4/1/16</td>
<td>4/29/16</td>
<td>10/4/16</td>
<td>2/14/17</td>
<td>3/31/17</td>
<td>3</td>
<td>$2.80</td>
<td>$0.70</td>
</tr>
</tbody>
</table>

### Highlights

- **Building Automation Systems**
  - Meet with the 2 primary vendors that have 90% of UC Spend. (Siemens and JCI)
  - Meet with Aircurity. Currently used at UCI. Add on to BMS system. Air Quality Device. Kick off meeting conducted on 6/23
  - Group primary focus currently stated is mostly on the service and transparency.
  - Data Request sent out 7/22/16 and due on 08/08/16

- **Elevator Maintenance**
  - Actively researching category
  - Obtained appropriate point of contact for vendors in system.
  - No current issues

- **CareShare**
  - 9/16 Team meeting to discuss RFP Questions and evaluation matrix
  - 9/27 - presented business case to PLC
  - 10/17 - Preliminary conference call
  - 10/20 - Team meeting to answer all Q&A
  - No current issues
  - 30k savings for CSU
  - 1/26 - Negotiation in person meeting at UCLA

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6/14/2019
Data transformed into change…
Welcome Dave Taylor

Tableau
What’s New in Tableau 2019.2

*Vector Maps
*Parameter Actions
*New Home Page on Tableau Server

Dave Taylor, Tableau
Tableau Resources

- Tableau Blogs
  - InterWorks Blog
    - https://www.interworks.com/blog
  - Evolytics Blog
    - https://www.evolytics.com/blog

- Data Set Resources
  - Data.World
    - https://data.world
  - Kaggle
    - https://www.kaggle.com

- Tableau Communities
  - Makeover Monday
    - http://www.makeovermonday.co.uk/data/
  - Workout Wednesday
  - Sports Viz Sundays
    - https://data.world/sportsvizsunday
  - Data For A Cause
    - https://twitter.com/dataforacause
  - Viz For Social Good
    - https://twitter.com/hashtag/VizForSocialGood?src=hash