

Configuring the Spend Dashboard

Access the Dashboard by clicking on the Spend Dashboard card in the **Analyze** module main menu. The dashboard gives you a snapshot of spend across the system by displaying six high-level graphical views (only 4 shown in the graphic below) of key spending data by campus, categories, top suppliers, trends and other data categories you want to track. This guide introduces you to how Dashboard data is displayed and shows you how to change the view and filter.

Changing the Dashboard Anchor Filter

1. The upper left displays how the Dashboard's spend data is filtered. This drives the information that displays in the other panes. The dashboard's default filter view is your campus.
2. The time period on which the Dashboard's Spend data is based displays here.
3. The information that displays in the upper left pane of the dashboard (the **Anchor** view) can be changed by clicking on the tabs in the pane bar.
4. Click the **Filter** icon to add an additional (secondary) filter for displaying dashboard information.
5. In the **Advance Filter window** that displays select a second level filter category on the left side.
6. Click specific filter data on the right side of the **Advance Filter window**.
7. Click **Apply Filter** to add the secondary filter.


The screenshot shows the Spend Dashboard interface. Callout 1 points to the 'Campus' filter set to 'UCLA'. Callout 2 points to the 'Global Spend' time period 'MAY-2017 to APR-2018'. Callout 3 points to the 'Top 50 Supplier' tab in the 'Supplier' pane. Callout 4 points to the 'Filter' icon in the top right. Callout 5 points to the 'Advance Filter' window, which is open and shows a list of filter categories on the left and a list of specific filter items on the right. Callout 6 points to the 'Apply Filter' button at the bottom of the 'Advance Filter' window. Callout 7 points to the 'Apply Filter' button. The dashboard also displays a 'Top 10 Category' bar chart and a 'Campus' table.

Tips

Repositioning Panels

- Drag and drop any panel (except the Anchor pane) to reposition it on the dashboard.

Drilling Down on Dashboard Data

- The Anchor view can be clicked on or hovered over to provide additional levels of detail. Depending on the view and the data available, you can drill down to four levels of detail.
- Click an Anchor view component to 'drill down' to the next level of detail. The other panels will change related to your selection. For example, if your Anchor view is **Category**, and you click **Education and Laboratory**, the other panels (Supplier, Trend, etc.) will display that category-related data.
- Click the **Refresh** icon  in the upper right part of the screen to redisplay the original view after drilling down or repositioning panels.

Hovering

- Hover over a graph component (bar charts and/or diagrams) to view the complete name and dollar amount associated with it.

Displaying the Supplier Parent

- Clicking on a parent supplier listing in the dashboard will display its child companies.

Save Dashboard

If you want the dashboard view you created with your filter to become your default dashboard, save it with these three easy steps:

1. Click **Save Dashboard**
2. Name the dashboard
3. Click **Save**.

