

CALUSOURCE

— Collaborative Procurement

Insights Reporting

January 2020

Today's Objective

- Understand what's changed with contracts reporting
- Learn how to leverage contracts reports
- Customize pre-built reports
- Subscribe to reports

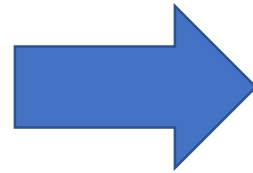
A blurred background image showing a person walking on a grassy field with trees. The person is wearing a light-colored shirt and blue pants, and is carrying a dark bag. The scene is outdoors with bright lighting, creating a soft, out-of-focus effect.

CalUsource Contracts Insights Reporting

New Reporting: "Insights"



Out with the old...



...and in with the new!

New Reporting: “Insights”

Insights = Reporting

Vision = Make a Visualization from Reports



New Reporting: “Insights”

What’s changed?

- Look and feel
- (3) new contracts reports

What’s stayed the same?

- Existing contracts standard reports

Who can access?

- Procurement professionals (same as before)

The screenshot shows a dashboard titled "ANALYZE - INSIGHTS" with a navigation bar containing a back arrow, a document icon, and the title. Below the navigation bar are three tabs: "STANDARD REPORTS (10)", "SHARED REPORTS (0)", and "MY REPORTS (3)". The "STANDARD REPORTS" tab is active. A list of reports is displayed, each with an icon, a title, and metadata. The reports are:

Category	Count	Report Title	Data Source	Owner	Created On
All	52	CSU Systemwide Agreements (incl. Department)	Contract	Christina Jones	12/10/2019, 11:50:4
Bar Chart	6				
Line Chart	10	UC Systemwide Agreements (incl. Method)	Contract	Christina Jones	12/10/2019, 11:36:4
Table	1	CSU Systemwide Agreements (incl. Method)	Contract	Christina Jones	12/10/2019, 10:51:3
Network	2				
Wallet	31	Contracts with Incentives	Contract	Christina Jones	12/10/2019, 12:24:1
Group	2				
		Contracts Expiring in 30 days	Contract	Christina Jones	12/10/2019, 1:02:58
		Contracts Expiring in 60 days	Contract	Christina Jones	12/10/2019, 1:02:02

New Reporting: “Insights”



How to leverage reports:

- Overall pipeline management
- Access systemwide contracts/MEAs
- Research competitively bid agreements
- “Build your own”

New Reporting: “Insights”

Site Demonstration

Available Resources

Today's Webinar: Recording & Slide Deck

CALUSOURCE
Collaborative Procurement

FOR STAFF ▾ FOR SUPPLIERS ▾ PUBLIC BID SITE SUPPORT ▾ **PLATFORM LOGIN**

CONTRACT WEBINARS

As “show and tell” instruction, our webinars coach you into greater proficiency and confidence using CalUsource. Brief in length (20-30 minutes), they focus on one or two critical processes or actions within the Contract module. These webinars include a slide deck PDF so you can follow the process at your own speed.

All links open in a new window.

DATE	RECORDED WEBINAR	SLIDE DECK
6.17.19	CalUsource Contracts Upgrades	
1.28.19	Contracts Lifecycle Management	PDF
11.19.18	Searching for Contracts & Performing Advanced Reporting	PDF
7.2.18	Using Electronic Signatures	PDF
6.4.18	Uploading Campus-Specific Templates into CalUsource	PDF
5.16.18	Contract Search Training for OGC	PDF
3.1.18	Uploading and Amending Contracts in CalUsource	PDF

Available Resources

New! Knowledge Based Articles (KBAs)

INSIGHTS & VISION / SPEND ANALYTICS QRGs

Insights & Vision Knowledge Base Articles (KBAs). The Knowledge Base Articles are fully searchable, available on all devices, do not require downloading a PDF, and can be printed for easy reference. You can also access the full [Insights & Vision Knowledge Base here](#).

All links open in a new window.

CATEGORY	KNOWLEDGE BASE ARTICLES
Creating Reports	Accessing the Insights Module
	Creating a Report with Insights
	Modifying a Report with Insights
	Filtering Reports with Insights
	Types of Filters in Insights
	Data Source Objects in Insights & Vision
Formatting and Calculations	Formatting Numerical Values in Insights
	Custom Calculations with Insights – Derived Measures
	Charts and Visualizations – Flip a Grid to a Chart
	Sharing Reports with Insights



Questions?