



# Procurement Dashboard Automation

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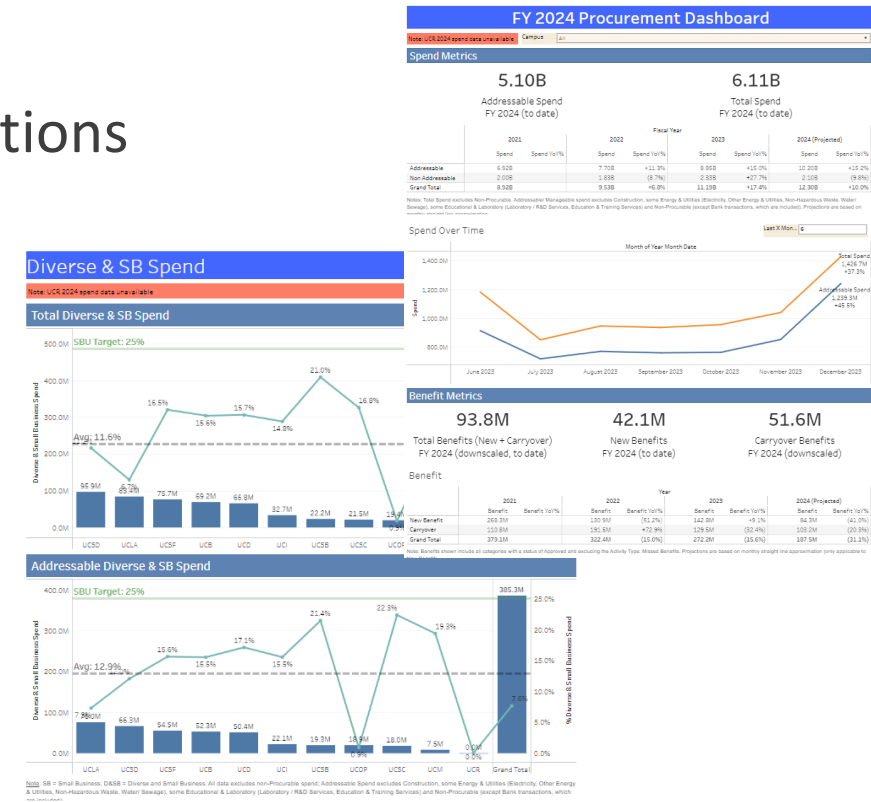
April 17, 2024

# Agenda

- Objectives of the Project (Phase 1)
- Technical Summary
- Procurement Dashboard Training April 17 @ 10:30 am

# Objectives of the Project (Phase 1)

- **An interactive online dashboard** replicating exiting set of KPIs
  - Automate current manual process
  - Provide multiple filtering and drilldown options
  - Ability to subscribe and receive a PDF copy in email
  - Provide executive level summary of UC Procurement KPIs



# Technical Summary

## Source of Data

- CalUsource, Benefit Bank

A screenshot of the University of California Procurement Services Benefit Bank interface. It shows a table with columns for item name, quantity, and price. The table lists various items such as "Office Supplies", "Travel", and "Telecommunications". The interface includes a search bar and a "Filter" button.

## Technology

- SQL Service Database - Back End
- Tableau Dashboard - Front End
- Tableau Server – Deployment



## Refresh Frequency

- Monthly – in-sync with Spend and Benefit Bank monthly update to CalUsource

# Previous Demo and Feedback Received

- 2 Demos to Full Project Team – 2/15 and 3/15/2024
- Integrated Procurement Project Management (IPM) Cohort – 3/13/2024
- Systemwide Procurement Leadership (SWPLT) – 3/16/2024
- Procurement Leadership Council (PLC) – 3/19 and 4/2/2024

# Procurement Dashboard Training

- Wednesday, April 17 @ 10:30 am
- Registration Link:
- [https://ucop.zoom.us/meeting/register/tJApc-6uqz0qHNM1Qc\\_LkkmA7FYVHUvCTf1F#/registration](https://ucop.zoom.us/meeting/register/tJApc-6uqz0qHNM1Qc_LkkmA7FYVHUvCTf1F#/registration)



4/3/2024

In This Issue:

- [Pipeline Report](#)
- [Latest Agreements](#)
- [Upcoming Events & Training](#)
- [Benefit Updates and YTD](#)
- [Systemwide Team Updates](#)

### Training for New Target Reporting Dashboard



**Procurement Dashboard Drive Through - April 17 @ 10:30 am**

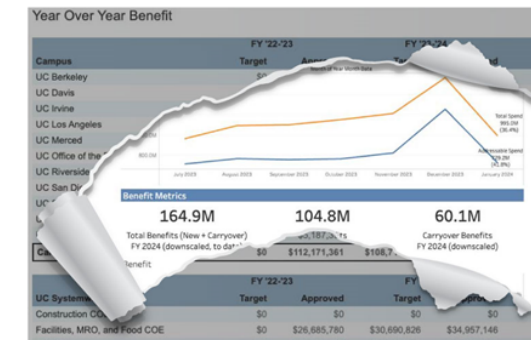
Register today to learn more about the metrics and visualizations your leaders use to measure campus and systemwide benefits and spend. We will walk through definitions and current values of key metrics through a short demonstration of a new Tableau dashboard.

[Register for Dashboard Training](#)

4/3/2024

UC Procurement Connections

Register for the Procurement Dashboard Drive Through - April 17 @ 10:30am



We developed a comprehensive visualization tool that allows you to dive deeper in our spend and benefit data.

Learn more about the metrics and visualizations used to measure campus and systemwide benefits and spend. We will walk through definitions and current values of key metrics through a short demonstration of a new Tableau dashboard.

This session requires registration to attend. This hour-long training will start at 10:30 AM on Wednesday, April 17th.

[Register for the Dashboard Training](#)

4/8/2024  
Email Invite

# Thank You!