

How to Navigate the Procurement Data Dashboard Video

Transcript

At the very top there are three tabs:

- Dashboard
- Top 30 certified vendors
- Top 30 commodities.

Just below that there are blue dashboard filter tabs:

- Select Fiscal Year
 - Select Acquisition Type
 - Select Acquisition Method
 - Select Department
 - Select Certification Type
 - Select Vendor
 - Select Commodity
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- **For Fiscal year** – Use the drop down list and select one of the fiscal years, which is July 1st through June 30th.
- **For Acquisition type** – Use the drop down list where you can select one or more for:
 - IT goods,
 - IT service,
 - non-IT goods,
 - non-IT services
 - telecom

If you right click your mouse, you can select all items or clear selection if anything is selected.

If no acquisition type is selected, then all acquisition types are pulled in as an automatic default.

- **For Acquisition method** – You can use two types of methods to search for the acquisition method.
 - You can type “Option” and press “Enter”. It will auto-populate a list of names that is the closest to the characters you entered.
 - You can also use the scrolling method by using the side bar to scroll through the different methods names.

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If you right click your mouse, you can select all items.

If you right click your mouse again, you can clear selection.

- If no acquisition method is selected, then all acquisition types are pulled in as an automatic default.
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- **For Department** - You can use the two types of methods to search for the department name just like you did for acquisition method.
 - You can type in the name or you can use the scrolling bar on the side.
- **For Certification type** - You can select one or more types from:
 - DVBE only
 - SB only.
 - dual certified (DVBE & SB)
 - non-certified
 - recognized non-profit

As a default dual certified, DVBE only and SB only is selected. If you would like to deselect these, you can click onto them or right click your mouse and select “clear selection”.

- **For Vendor** - You can use the two types of methods to search for the vendor name just like you did for acquisition method.
 - You can type in the name or you can use the scrolling bar on the side.
 - If no vendor is selected, then all vendors are pulled in as an automatic default.
- **For Commodity** - You can use the two types of methods to search for the commodity name just like you did for acquisition method.
 - You can type in the name or you can use the scrolling bar on the side.
 - If no commodity is selected, then all commodity types are pulled in as an automatic default.

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If you look to the right of the dashboard you can see there is a container that states "Data Filters Applied for the Current View". The filters that you selected from the blue tabs will appear below in this box. This is a helpful tool when you are not sure what you had selected for the filters.

Just below that is an it explanation of terminology that you might receive during your search. If you receive a notice that states "Missing" or "0" value, then it indicates that there is no spend reported. Also, if you receive the message "No Item Selected" then it means that all items have been selected as a default.

Below that there is a link to the data dictionary.

Here you can find the definitions of the data by field name, field descriptions, data type, example, notes, field detail and data source.

The charts on the dashboard are divided into 4 quadrants. If you need to enlarge any of the graphs on the page you can select the "<<" and then "⌕" will appear. To reduce the graph select the "<<" and then "⌕".

1. The top left chart shows us the dollars awarded to certified firms.
2. To the right of it, this bar chart shows us the number of transactions with certified firms.
3. The bottom left quadrant shows us the number of departments awarded to certified firms. You can double click this graph to get additional department information.
4. The bottom right quadrant shows us the number of vendors by certification type. You can double click this graph to get additional department information.

As mentioned previously, the bottom 2 quadrants will give you additional information if you click into the graph. You can also enlarge the screen.

If you right click your mouse over the column you would like to sort by either ascending or descending order.

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At the very top of the dashboard there are two tabs:

- **“Top 30 Certified Vendors”** which is a list of the top 30 vendor names by total dollars that are grouped by SB only, DVBE only and Dual Certification (DVBE+SB).
- The other tab is for the **“Top 30 Commodities”**. There the commodity is broken down by SB only, DVBE only and Dual Certification (DVBE + SB) by total dollars. If you click in the data and right click you can sort the data by ascending or descending order.