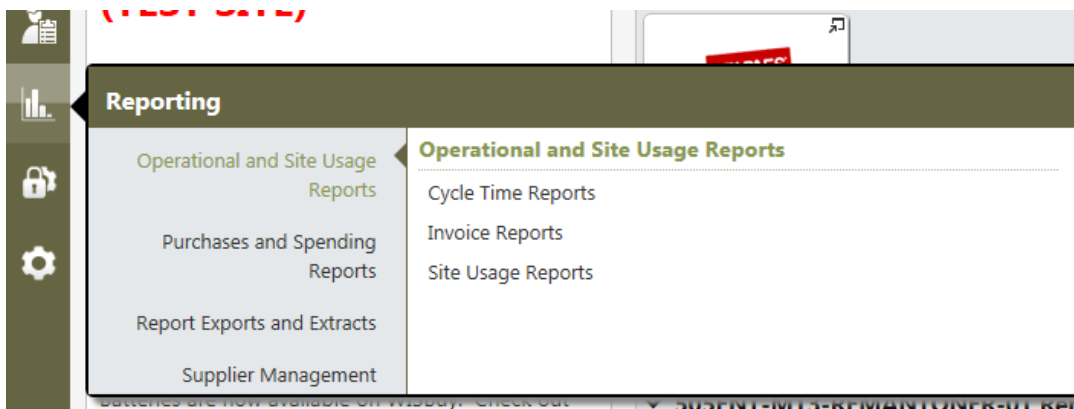


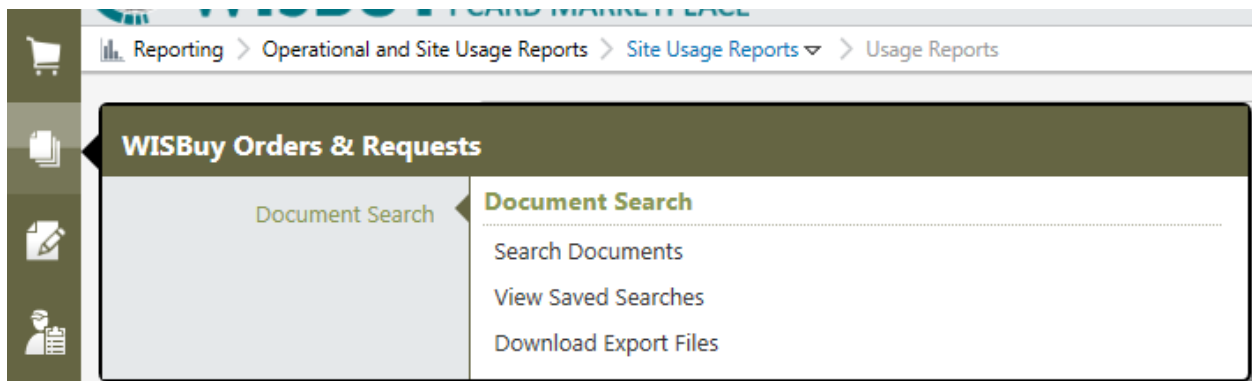
## Admin-Reporting Menu

WISBuy has tools to allow you to analyze and review your organization's data. Reporting data can be viewed via the application or exported for external usage. There are two primary places in the application that are used for reporting:

**Reporting:** This area of the application is used to view real-time reports based on criteria selected by the user. Reports on spend; site usage, contracts, and more are available. The information displayed provides detailed information about what suppliers are being used, what and items are being ordered.



**Document Search:** Users and administrators can access purchasing and requisition data using Document Search. In addition to viewing the information on the screen, the data can be exported as a \*.csv file. This file can be opened in Excel or Access to create reports.



## Reporting:

Below is an explanation of some of the system reports available. When running these reports some of the criteria the system uses to create the report may not be currently added in WISBuy. Some of these system reports may not be accurate. Any of these report results can be exported in a \*.csv format then opened in Excel.

**Cycle Time Reports:** Cycle Time Reports analyze the time it takes for a purchase to go through WR, WO or Invoice workflow. These reports are useful in helping you to determine areas for process improvements.

**Spend Summary Reports:** Spend Summary Reports provide an high-level and detailed information related to organization spend and spend by supplier. These reports will help you gather spend information such as top and bottom suppliers, catalog vs. non-catalog ordering, total spend within a specified timeframe, spend by Business Unit and spend by supplier item.

**Purchasing Reports:** These easy-to-use reports provide high-level statistics and purchasing information. Select the report type and date range to query and the system will return the statistics for the given timeframe.

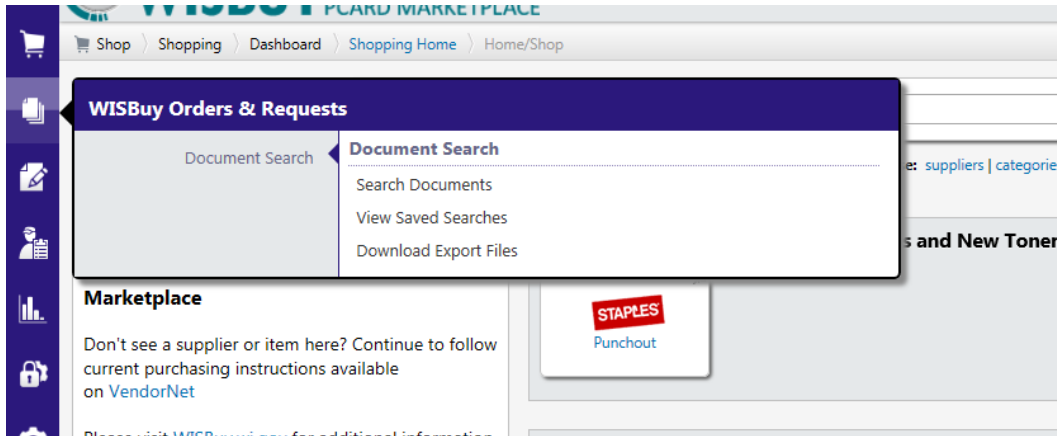
**Spend Analysis Reports:** These reports compare an organization's spending habits across two periods in time with regards to preferred/non-preferred vendors, spend by category, and savings estimates by category ("savings" = difference between list price and private pricing). There are reports for both purchase requisitions and purchase orders.

**Site Usage Reports:** Usage Reports provide real-time site usage information, including number of unique users, number of searches performed, and more. These reports are helpful for tracking metrics such as user adoption, trends in user activity, and specific functions users perform. After selecting the report and date range, the report displays on the screen.

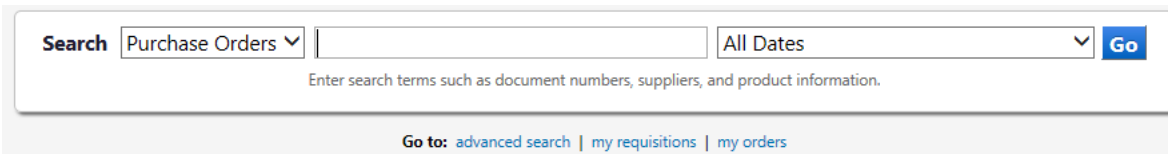
## Document Search and Export

The document search allows BU Admins to review user orders and requisitions. These searches can be exported in a \*.csv format and opened in Excel. The exports can be a simple listing of user orders to a full spreadsheet including the items on the order.

1. In the left navigation pane click on the WISBuy Orders & Requests icon.
  - a. Choose Search Documents



2. Search criteria can be;
  - a. Purchase order(WISBuy order number), Requisitions, or Both
  - b. Select the date range.
  - c. Further refine your search by entering a user name, supplier or an item.
  - d. Click Go



3. The search returns any matches for any of the criteria entered

**Note:** In a search for Staples WISBuy also included Grainger. Grainger sells staples for various repair projects, the search pulled orders that had staples. Review the filters for the information in the search and add any additional filters if necessary.

WISBuy Orders & Requests > Document Search > Search Documents > Document Search

< Back to Edit Search Start New Search

Showing 1 - 100 of 10000+ Results Total result count is: 26496

All Dates

Results Per Page: 100 Sort by: Best match Page 1 of 100

WISBuy Order No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	WISBuy Order Total
✓ W0036753	Staples Advantage	10/21/2016 8:21 AM	80500241	Angela M Singh	Sent	19.50 USD
✓ W0036752	Staples Advantage	10/21/2016 8:11 AM	80499801	Elizabeth Barnum	Sent	7.30 USD
✓ W0036750	Staples Advantage	10/21/2016 8:07 AM	80499577	Charlie Shimeall	Sent	75.78 USD
✓ W0036748	Staples Advantage	10/21/2016 7:26 AM	80497955	Elizabeth Bloedow	Sent/Confirmed	25.19 USD
✓ W0036747	Staples Advantage	10/20/2016 4:34 PM	80490333	JonAnne Walters	Sent/Confirmed	42.05 USD
✓ W0036746	Staples Advantage	10/20/2016 4:06 PM	80488789	Maria Volkmann	Sent/Confirmed	102.23 USD
✓ W0036745	Staples Advantage	10/20/2016 4:02 PM	80488597	LaVon Buehl	Sent/Confirmed	39.58 USD
✓ W0036744	Staples Advantage	10/20/2016 4:00 PM	80488513	Cody Castillo	Sent/Confirmed With Cancelled Items With Supplier Modifications	35.94 USD
✓ W0036743	Staples Advantage	10/20/2016 3:54 PM	80488117	Estella Walczyk	Sent/Confirmed	71.83 USD
✓ W0036742	Staples Advantage	10/20/2016 3:50 PM	80487712	Kathy Mahrke	Sent/Confirmed	620.47 USD
✓ W0036741	Staples Advantage	10/20/2016 3:47 PM	80487513	Sandra Sromek	Sent/Confirmed	482.74 USD
✓ W0036740	Staples Advantage	10/20/2016 3:41 PM	80196797	John Koons	Sent/Confirmed	207.23 USD

Search Details

Search Terms

**Keyword**  
STAPLES

Filtered by

Type: Purchase Orders  
Date Range: All Dates  
[Save New Search] [Export Search]

Refine Search Results

Document counts are unavailable for total results over 10000

Type  
Purchase Orders

Date Range  
All Dates

Supplier  
Staples Advantage  
WW Grainger, Inc.

- Once you have the orders to review, click the Export Search button in the Search Detail box on the left of the screen.

Search Details

Search Terms

**Keyword**  
STAPLES

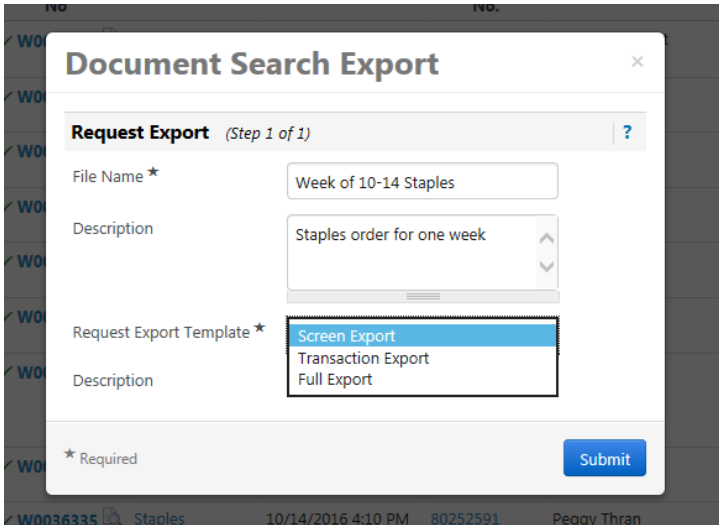
Filtered by

Type: Purchase Orders  
Date Range: All Dates  
[remove all]

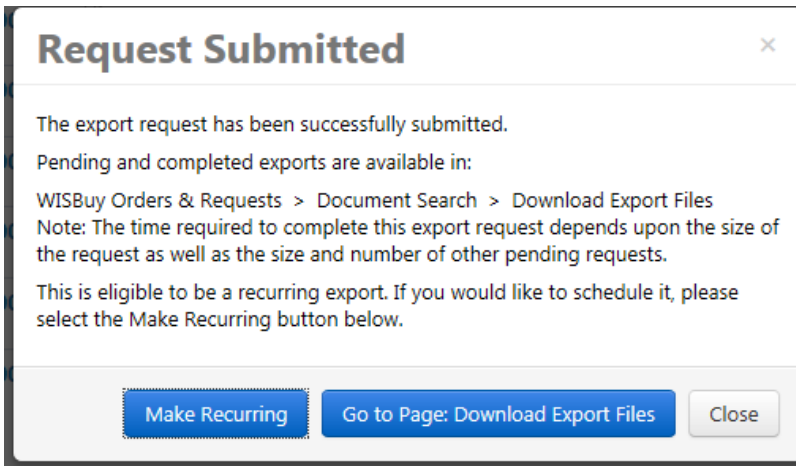
**Supplier**  
 Staples Advantage

[Save New Search] [Export Search]

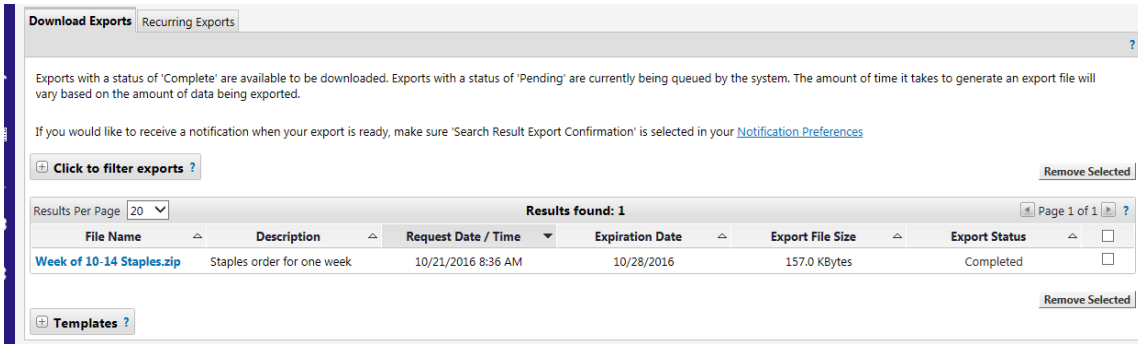
- The document export will open, to save the information for the orders to a file;
  - Enter a file name,
  - Enter a description,
- Select a Template to save the file as,
  - Screen export is an export of what is on the screen.
  - Transaction Export will export the orders with the line detail.
  - Full Export will export any information attached to the order (contract summary info, bill to, ship to, UNSPSC and much more)



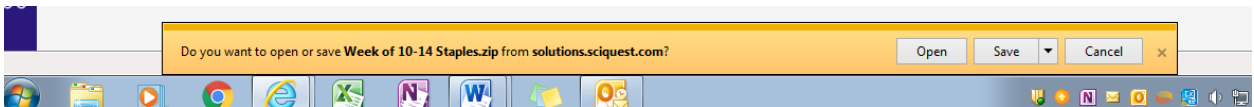
7. Click submit, the system will prompt you where the download will be saved. The system will also notify you when the report is done by the preference you choose in your profile.



8. Go to the Download Export Files, the file will be saved as a zip file. Click on the file name which is colored blue.



9. A prompt should appear at the bottom of your screen to save the file. Click the arrow on the Save button and choose Save As. Select the folder to save the zip file.



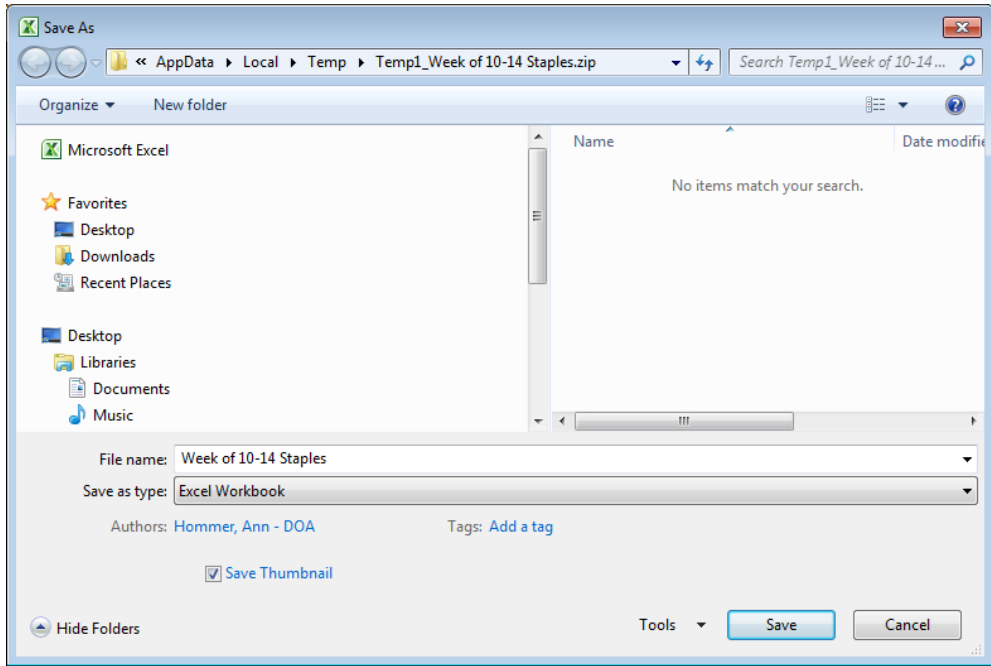
10. Click the Open folder button to unzip the file. Find the file and double click on the file name. The file will unzip and open a new window.

Name	Type	Compressed size	Password ...	Size	Ratio
Week of 10-14 Staples	Microsoft Excel Comma S...	157 KB	No	1,545 KB	90%
Week of 10-14 StaplesFormData_	Microsoft Excel Comma S...	1 KB	No	0 KB	0%

11. The files that have been unzipped are in a \*.csv format. These will open with Excel and need to be saved as an Excel document to save any changes. Open the file in Excel.

WISBuy Order ID	Creation	Original R	Last Revis	Last Distri	Workflow	WISBuy O	Requeste	PR ID	Payment	WISBuy O	Buyer: Fir	Buyer: Las	Buyer: Phc	Buyer: Em	Departme	Supplier F	BillTo	Adc	BillTo	Adc	Bill
1	62592467	#####	#####	#####	#####	W0036343	80266942	P	Card	Margaret Knight	+1 (262) 8	margaret.heroux@wi.gov	WISBuy	Single Bill Att							
2	62592467	#####	#####	#####	#####	W0036343	80266942	P	Card	Margaret Knight	+1 (262) 8	margaret.heroux@wi.gov	WISBuy	Single Bill Att							
3	62592467	#####	#####	#####	#####	W0036343	80266942	P	Card	Margaret Knight	+1 (262) 8	margaret.heroux@wi.gov	WISBuy	Single Bill Att							
4	62592467	#####	#####	#####	#####	W0036343	80266942	P	Card	Margaret Knight	+1 (262) 8	margaret.heroux@wi.gov	WISBuy	Single Bill Att							
5	62592467	#####	#####	#####	#####	W0036343	80266942	P	Card	Margaret Knight	+1 (262) 8	margaret.heroux@wi.gov	WISBuy	Single Bill Att							
6	62592467	#####	#####	#####	#####	W0036343	80266942	P	Card	Margaret Knight	+1 (262) 8	margaret.heroux@wi.gov	WISBuy	Single Bill Att							
7	62592467	#####	#####	#####	#####	W0036343	80266942	P	Card	Margaret Knight	+1 (262) 8	margaret.heroux@wi.gov	WISBuy	Single Bill Att							
8	62592467	#####	#####	#####	#####	W0036343	80266942	P	Card	Margaret Knight	+1 (262) 8	margaret.heroux@wi.gov	WISBuy	Single Bill Att							
9	62592467	#####	#####	#####	#####	W0036343	80266942	P	Card	Margaret Knight	+1 (262) 8	margaret.heroux@wi.gov	WISBuy	Single Bill Att							
10	62592467	#####	#####	#####	#####	W0036343	80266942	P	Card	Margaret Knight	+1 (262) 8	margaret.heroux@wi.gov	WISBuy	Single Bill Att							
11	62592467	#####	#####	#####	#####	W0036343	80266942	P	Card	Margaret Knight	+1 (262) 8	margaret.heroux@wi.gov	WISBuy	Single Bill Att							

12. Once the file is open save the file as an Excel workbook.



13. Once the file is save then the information can be worked with to create reports.

For further assistance, please contact [doawispro@wisconsin.gov](mailto:doawispro@wisconsin.gov).