

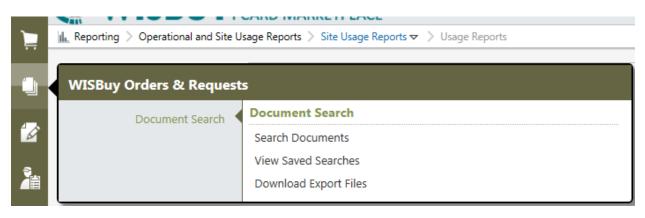
## Admin-Reporting Menu

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

È	Shop > Shopping > Dashboard >	Shopping Home > Home/Shop	
	WISBuy Orders & Request	5	
	Document Search	Document Search	
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		View Saved Searches	
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- 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

Search Purchase Orders 🗸	All Dates	✓ Go							
Enter search terms such as document numbers, suppliers, and product information.									
Go to: advanced search   my requisitions   my orders									

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 varies 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.



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Search Terms	<u>^</u>	WISBuy Order No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	WISBuy Order Total	C
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		✓ W0036752 🗟	Staples Advantage	10/21/2016 8:11 AM	80499801	Elizabeth Barnum	Sent	7.30 USD	C
Filtered by Type: Purchase Orders		✓ W0036750 🖹	Staples Advantage	10/21/2016 8:07 AM	80499577	Charlie Shimeall	Sent	75.78 USD	0
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Staples Advantage WW Grainger, Inc.		🗸 W0036740 🖻	Staples Advantage	10/20/2016 3:41 PM	80196797	John Koons	Sent/Confirmed	207.23 USD	۵

4. 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	
[remov	e all]
Supplier ✓ Staples Advantage	
Save New Search Export Search	

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

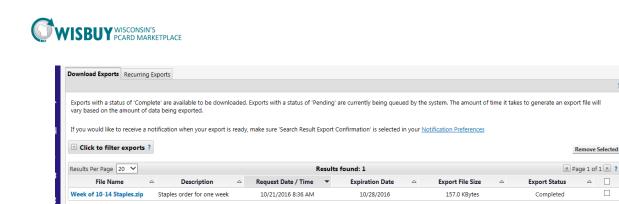


	110.	
<b>Document Sea</b>	rch Export	×
Request Export (Step 1	of 1)	?
File Name *	Week of 10-14 Staples	
Description	Staples order for one week	$\sim$
Request Export Template *	Screen Export	
Description	Transaction Export Full Export	
* Required		Submit
10 Staples	0/14/2016 4:10 PM 80252591	Peggy Thran

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.

Request Submitted ×						
The export request has been successfully submitted.						
Pending and completed exports are available in:						
WISBuy Orders & Requests > Document Search > Download Export Files Note: The time required to complete this export request depends upon the size of the request as well as the size and number of other pending requests.						
This is eligible to be a recurring export. If you would like to schedule it, please select the Make Recurring button below.						
Make Recurring Go to Page: Download Export Files Close						

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.



🕀 Templates ?

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.

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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	Туре	Compressed size	Password	Size	Ratio
🔄 Week of 10-14 Staples	Microsoft Excel Comma S	157 KB		1,545 KB	
🔄 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.

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	A1 - fr WISBuy Order ID																			
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12. Once the file is open save the file as an Excel workbook.

Remove Selected

Remove Selected



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Save as type:	Excel Workbook			•
Authors:	Hommer, Ann - DOA	Tags: Add a tag		
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13. Once the file is save then the information can be worked with to create reports.

For further assistance, please contact <u>doawispro@wisconsin.gov</u>.