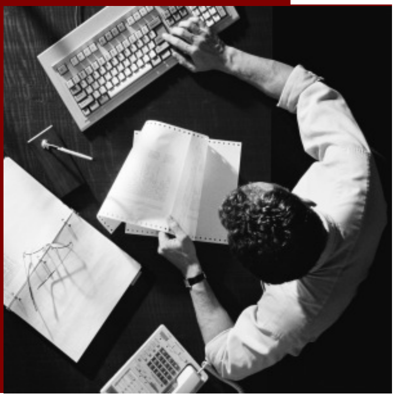
Adminstration Guide



SAP® xApp Spend Analytics release 1™ powered by SAP NetWeaver®

Target Audience

- Business analysts
- Data administrators
- System administrators
- Technology consultants

Document Version 1.00 - June 2007

Post SP0

DRAFT

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Icons in Body Text

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax

Additional icons are used in SAP Library documentation to help you identify different types of information at a glance. For more information, see *Help on Help* → *General Information Classes and Information Classes for Business Information Warehouse* on the first page of any version of *SAP Library*.

Typographic Conventions

Type Style	**Represents**
Example Text	Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths and options. Cross-references to other documentation
Example text	Emphasized words or phrases in body text, titles of graphics and tables
EXAMPLE TEXT	Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example, SELECT and INCLUDE.
Example text	Screen output. This includes file and directory names and their paths, messages, names of variables and parameters, source code as well as names of installation, upgrade and database tools.
Example text	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.
EXAMPLE TEXT	Keys on the keyboard, for example, function keys (such as **F2**) or the **ENTER** key.

Contents

Preface

This chapter describes the objectives, intended audience, and organization of the *SAP xApp Spend Analytics™ User Guide*.

About This Guide

This user guide contains a quick reference section, the configuration policies, administrative information, spend data management and reporting information, and root menu option reference sections available in SAP xApp Spend Analytics ™ (xSA).

xSA is SAP's next-generation end-to-end spend analysis solution.

It includes the following chapters and appendices:

Chapter 2, "Introduction"— gives an overview of the main scenarios of xSA: data management and end-user reporting.

Chapter 3 "Configuring the xSA Web Client"— provides instructions on configuring the xSA client application to specific requirements of your organization and preferences of an individual user.

Chapter 4, "Quick Reference"— summarizes the major processes of the data management and end-user reporting scenarios.

Chapter 5, "Data Management"— contains step by step instructions for all process steps of the data management activities.

Chapter 6, "Reporting"— contains step-by-step instructions for the end-user reporting activities.

Chapter 7, "Reference Section" provides detailed information on each menu-item and dialogue screen of xSA.

The appendices have useful sheets and information tables and lists. You can use the sheets while setting up your environment and to keep for customized lookup references later on.

Appendix A: User Name Sheet

Appendix B: System Configuration Sheet

Appendix C: Related Application Sheet

Appendix D: Out of the Box Report Analysis Information

Appendix E: xApp Spend Analytics Menu Tree

Audience and Scope

This guide is intended for system administrators, who install and configure the xSA system, data managers, who administrator the upload of data into an xSA system and all related activities, and business analysts and purchasing leads, who use xSA primarily for end-user reporting activities.

Contacting Us

Visit us on the web; www.sap.com/solutions/xapps/

Icons and Symbols

Introduction

SAP xApp Spend Analytics (xSA) is an analytical application that helps companies gain a comprehensive view of their spend data. It aggregates data from heterogeneous sources, supports data cleansing and classification activities and provides a rich reporting and analysis environment that offers both out-of-the-box and *ad hoc* analysis capabilities for analyzing all spend data.

Companies that implement xSA should experience benefits including cost reduction, supplier rationalization, improved compliance, increased share of managed spend and overall improved procurement process efficiency.

Main xSA Scenarios

Using xSA can be subdivided into two major scenarios, with a system administrator setting up the basic environment within which to work. These scenarios are:

- data administration
- end-user reporting

The **data administration scenario** manages the following:

- uploading spend data extracts into the xSA data model
- validating the data
- exporting and reintegrating data from processing in third party tools for cleansing and classification
- releasing the data into the production reporting environment

Spend relevant data sources include invoices, purchase orders, contracts, travel and expense, p-card and project information. The spend data management scenario also comprises preparatory steps such as the configuration of spend-cycles, mapping templates and other system settings.

The **end-user reporting scenario** manages the following from a design-time and runtime perspective:

- creating reports
- running reports
- ad-hoc query
- interactive analysis
- dashboards

xSA Roles

xSA comes with a pre-defined set of roles which are assigned to users according to their tasks and responsibilities. xSA defines each role with particular levels of authorizations and tool use within the application. Refer to the *xApp Spend Analytics Installation Guide* for installation instructions.

xSA Roles include:

- **Administrator**: Manages mapping templates for the mapping of extract files to the inbound xSA data structures. Provides data extracts for upload into an xSA system and administrators to upload validation and release of data.
- **Data Manager**: A third party position, responsible for .
- **Commodity Manager**: Assesses spend performance based on targets or goals and recommends opportunities based on research. Studies external markets and competitors to understand macroeconomic environment and may recommend responses using financial tools. May drive budget or forecasting processes and reallocate expenses to originating cost centers based on benefit or use criteria.
- **Procurement Executive**: Responsible for managing spend-analysis and driving cost savings. Responsible for drafting purchasing policy and enforcing performance measurements of the procurement organization.
- **Note**: The System Administrator does not have an xSA role. The System Administrator is usually a super-user and sets up users and roles and provide access to analysis and reports with data secured according to user authority. Configure the content and set up links to related applications.

Configuring the xSA Web Client

Configure xSA Web client to adapt to specific requirements of your organization and preferences of individuals assigned xSA roles.

Settings Menu Options

The following is an overview of the root menu settings option:

- The User Preferences menu option customizes the behavior of the xSA Web client, such as the preferred layout characteristics of charts in new reports. This menu item is available for all roles.
- The Organize Content menu option set the configuration of the available xSA content. This menu choice is **only relevant for system administrators**.
- The Settings → Related Application Configuration menu options set links to other applications that can be executed from within an xSA Web client report. These menu choices are expressed in the Related Applications root menu option. This menu choice is **only relevant for system administrators**.
- The Settings → Quick Link Configuration menu option sets direct links to outside applications.

User Preferences

The User Preferences are individual settings for each user that control various default settings for new reports, your home dashboard and the content that is visible in the content navigator. You can change your individual user preferences listed in the following:

1. Choose *Setting* → *User Preferences*

   The User Preferences dialog appears.
2. In the General options, for each of the following:
   a. Choose a data source
   b. Choose a primary role
3. Choose a Dashboard option.
4. Choose the Report options:
   a. Table or navigation content
   b. Chart gridlines or shaded patterns
   c. Select to animate the charts or not
   d. Choose to show the chart legend or not
   e. Choose to show the totals in tables
5. Click *OK*.
6. Choose *Settings* → *Refresh Content Navigator*.

Settings Menu Options

The following table explains each individual setting:

Table 1: User Preference Setting Definitions

Preference	Possible Settings	Description
Data Source	Name of any xSA InfoProvider	Controls the default data source that is selected when you create a new report. See Reference section for definitions.
Primary Role	System Administrator, Data Manager, Business Analyst, Procurement Executive	You can have multiple roles assigned to a user. Each role has a root folder associated with it. This setting controls which role and root folder is currently selected for you.
Home Dashboard	Name of any dashboard available in the system	This identifies the dashboard that is presented to the user when the application is first executed.
Annotation View	Table, Tree	This identifies a user preference to view or not to view annotations
Chart Gridlines	Horizontal or Vertical Lines None Horizontal or Vertical Patterns	This identifies a user preference for viewing the gridlines type in a chart.
Animate Charts	Checked/Unchecked	Identifies user personal preference to animate charts in a report.
Show Chart Legend	Checked/Unchecked	Controls whether new charts show a legend or not. A personal preference.
Show Totals in Table	Checked/Unchecked	Controls whether a new report displays totals and subtotals or not. A personal preference.

Organize Content

The settings in Settings → Organize Content are *only relevant for administrators*. The menu item is not available for users that do not have the Administrator role assigned to them.

xSA content consists of reports, dashboards and briefing books. These can be simply the predefined content that SAP provides or additional custom content that you have built in your xSA system. The content navigator provides access to content objects in an organized and secured manner.

The xSA content is organized in folders and subfolders, like in a file system. This structure is also referred to as a root folder.

Access and Visibility of Content

The content navigator secures the access to the content object based upon who created the content and if the content was shared. The following are the rules that apply regarding to visibility and organization of content objects

- Content created by users are always visible in the folder where the content was saved
- You can share objects with other users by using the sharing action.
- A shared object appears under the Public folder of the Content Navigator for all users. The Administrator can choose to have the shared content object appear in its original folder to all users by using the root folder editor option. See Root Map Menus and Commands on page 32.
- Administrators have access to all content.

To create a new tree

This option is only available to administrators.

1. Choose *Settings* → *Organize Content*.

   The Select Folder and Content Tree Editor panels appear.

2. In the Select Folder panel, click .

   The Create New Content Tree dialog box appears.

3. Enter a top-level name. (Only capital-alpha-numeric names are valid entries.)
4. (*optional*) Enter a description.
5. Click *OK*.

   The new folder is displayed in the Select Folder panel with four subfolders:

   - Dashboards
   - Reports
   - Public
   - Briefing Books

To create new content inside new tree folders

This option is only available to administrators.

1. Choose *Settings* → *Organize Content*.

   The Select Content Tree Folder and Edit Content Tree Editor panels appear.

2. In the Select Folder name box, click ▼.

   The new tree unrolls.

3. Choose the Dashboards folder.

   The Available Content choices appear.

4. Choose one or more dashboards. Drop them in the Selected Content list.
5. (*optional*) In the Content Navigator Editor panel, enter a new folder name in the Name field.
6. (*optional*) Enter a description.
7. Select items in the Available Content box. Drag them to the Selected Content box.

   You can drag the content items to reorganize the order.

8. Click .
9. To see the newly added content to the tree, choose *Settings* → *Refresh Content Navigator*.

This same set of steps can be used to create new Report, Public, or Briefing Book folders in a root folder.

Setting up E-Mail

Setting up xSA export functionality e-mail is integrated with the NetWeaver software.

Any xSA user must have a valid portal e-mail address, such as jane.doe@your_company.com. Once the portal e-mail is setup, see the xApp *Spend Analytics Installation Guide* for a detailed configuration description.

Related Applications Configuration

Configure related applications to let an xSA business analyst navigate to an external application such as Category Management, from a report. In this way, you can perform a closed loop analysis of taking the results listed in xSA reports directly to a target application for further actions.

The Related Applications Configuration feature executes another application and also delivers parameters from xSA, such as a project ID or some other dimension, from the context of the xSA report with which you are currently working.

This menu option is only available to administrators.

To follow the sequence of related applications configuration

The sequence of configuration and results are as follows:

- Configure the Related Applications screen with dimensions to be found in the report you are going to use with the applications.
- Create a new report. Ensure the dimensions needed to send to the external related application are present.
- Because the report attributes are coupled by configuring as such, the columns in the report are scanned for matching parameters. There are three resulting cases for every report with respect to the Related Application screen.
    1. The Source System is not part of the report. There is no parameterized URL to send to an external Web application.
    2. The Source System is part of the report, but does not match the Related Application screen configuration. There is no parameterized URL to send to an external Web application.
    3. The Source System is part of the report, and matches the Related Application screen configuration. A parameterized URL is configured and creates a new Web page for an external Web application.

To set up related applications

There are two types of applications to configure: **base** and context specific.

1. Choose *Settings* → *Related Applications*.
2. In the left side of the screen, enter one or more Application names.
    - This name appears in the report-related application pop-up menu.
    - This name is displayed in the root menu Related Applications menu. This is true only if the application name is associated with a transaction name defined as **BASE**.
3. In the top third of the screen, enter one or more Transaction Names.

Note: When a new transaction is created, a default source system is automatically created, guaranteeing every transaction has a default source system.

4. In the middle third of the screen, enter one or more Source System name.
5. In the middle third of the screen, enter the Parameterized URLs.

    Enter the URL string with a variable name you define to be a memory aid, marked with angle brackets, `<variable name>`.

    The variable name:

    - Listed as a read-only item in the Transaction Attribute column in the lower half of the screen.
    - Act as placeholders to receive *transaction attribute* data from the data cell when chosen from the report sub-menu.
    - Equates to the *xSA Dimension* you choose in the lower half of the screen.
6. In the lower third of the screen, choose an xSA Dimension.

Related Applications Configuration

See also Related Application Sheet on page 57 to plan the applications, source systems and parameters for planning and your records.

Quick Reference

This chapter outlines central activities involved in the two key xSA scenarios at a high level process overview, data management and data reporting (end-user reporting).

Note: You must understand concepts unique to xSA. If you are unfamiliar with the template mapping, data classification, and releasing your data, go to “Data Management” on page16.

Data Management

This section describes an overview of information necessary to configure xSA settings for your environment and upload your data.

The figure below shows the major steps of a data management scenario:

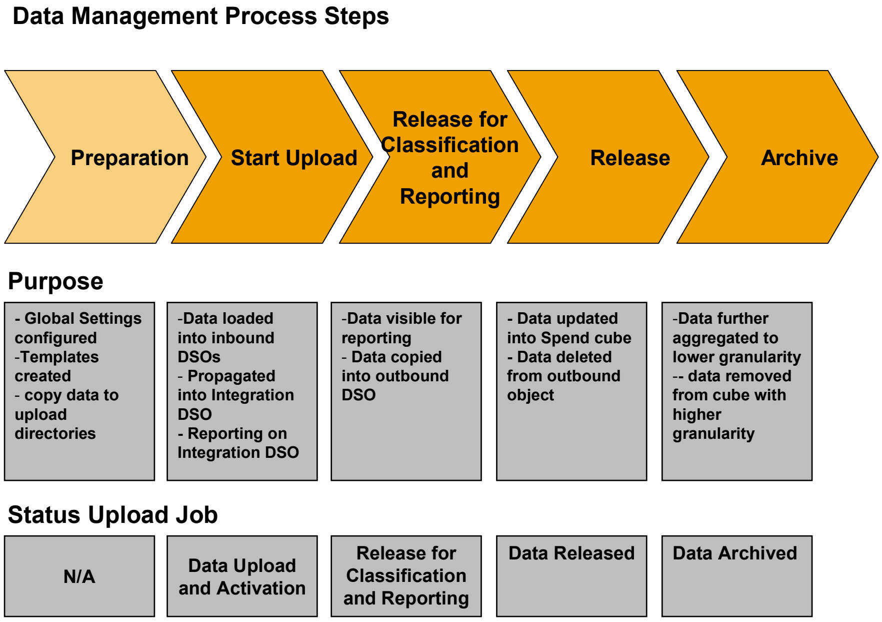

Figure 1: Key data management steps

The following are steps of an overview of the general order of tasks of Spend Analytics using xSA as a **data manager**.

Preparation

This section describes what to set up xSA for your corporate environment. Determine the following:

1. System, system IDs, and master data system names.
2. Refresh Periods.
3. Field labels.
4. Appropriate file and data types.
5. Templates that match your data fields.

Note: If you need new templates, see page 20 for step-wise directions to create a new template.

Start Upload

Upload your data sources from the application server to the staging area. Determine the following:

1. The data to be loaded, such as invoices or purchase orders.
2. Appropriate files for this data set.
3. Templates that match the data format.

Analyze

1. When to run the upload.
2. How to monitor the process.

Integrate

The upload moves from the inbound layer to the integration layer. Determine the following:

- If the data successfully uploaded, then release the data.

End User Reporting

This section describes information necessary to configure xSA to run a report and show reports in dashboards and briefing books.

The following are steps of an overview of the general order of tasks of Spend Analytics using xSA as a **business analyst**.

Create a New Report

You can create a new report using an out-of-the box report structure, or set up your own parameters with your data. Determine the following:

1. If you need to create a new report or modify an existing report.
2. The dimensions and measures for the report.
3. If you need to apply exceptions or filters. See pages 24 and 25 for exceptions and filters instructions.

Create a Dashboard

You can create a new dashboard with various reports. Determine the following:

1. If you need to create a new dashboard or modify an existing one.
2. What information you need in a dashboard.

Create Briefing Book

You can collect snapshots of various reports and dashboards by using a briefing book. Determine the following:

1. If you need to create a new briefing book or modify an existing one.
2. The specific information in the form of report or dashboard that you need in a briefing book.

Content Navigator

Use the content navigator to find and open dashboards, reports or briefing books. Determine the following:

1. If you need to find previously saved content.
2. If you need to browse the native xSA content.

End Note

If you need specific steps to fulfill these actions outlined in Quick Reference, refer to the Data Management chapter on page 16 and the Reporting chapter on page 21 for detailed step-wise discussions.

Data Management

This chapter describes setting upload and outbound parameters. You must be an administrator for all of the procedures in this chapter.

Prepare Global Settings

Prior to using xSA for the first time, you must to set the global parameters for your environment.

To set the general parameters

1. Choose *Data Management* → *Preparation* → *Global Settings.*

   The Global Setting screen appears with five tabs:
   General, Systems, Refresh Period, Field Labels, and Exchange Rates.

   The General tab is the initial view.

2. Click *Edit*.
3. Under the Collection set:
   a. Enter the Import Folder pathname, which was defined by the Transfer External Data procedure.
   b. Enter Export Folder pathname.
   c. Enter the Generated Files name.
   d. Enter the Application Server name.
4. Under the File Transport set:
   a. Choose the Delimiter.
   b. Choose the Escape Sign.
5. Under the Reporting set:
   a. Choose the Reporting Currency.
6. Under the Transport Settings set:
   a. Enter the Default Package.
   b. Enter the Default Transport Request.
7. Click *Save* to save your changes or click *Display* to leave the page without changes taking effect.

To create new systems parameters

1. Choose *Data Management* → *Preparation* → *Global Settings*.

   The Global Setting screen appears with five tabs:
   General, **Systems**, Refresh Period, Field Labels, and Exchange Rates.

2. Choose the Systems tab.
3. Click *New*.
4. Enter a System name (maximum entry of ten alpha-numeric characters).
5. Choose a Master Data System.
6. Enter the Owner name (maximum entry of twelve alpha-numeric characters).
7. Click *Save* to save your changes or click *Close* to leave the page without changes taking effect.

To edit a current systems parameters

8. Choose *Data Management* → *Preparation* → *Global Settings*.

   The Global Setting screen appears with five tabs:
   General, **Systems**, Refresh Period, Field Labels, and Exchange Rates.

9. Choose the Systems tab.

10. Choose a System Name row and click *Edit*.

    A new screen appears.

11. Enter your intended changes.

12. Click *Save* to save your changes or click *Close* to leave the page without changes taking effect.

To delete a current systems parameters

1. Choose *Data Management* → *Preparation* → *Global Settings*.

   The Global Setting screen appears with five tabs:
   General, **Systems**, Refresh Period, Field Labels, and Exchange Rates.

2. Choose the Systems tab.

3. Choose a System Name row and click .

   A new screen appears.

4. Enter your intended changes.

5. Click *Save* to save your changes or click *Close* to leave the page without changes taking effect.

To create a new Refresh Period parameters

1. Choose *Data Management* → *Preparation* → *Global Settings*

   The Global Setting screen appears with five tabs:
   General, Systems, **Refresh Period**, Field Labels, and Exchange Rates.

2. Choose the Refresh Period tab.

3. Click *New*.

4. Enter a name in the Refresh Period text field.

5. Enter a definition of this new Refresh Period in the Description text field.

6. (*optional*) Select the *Active* ☐ if this is to be the current Refresh Period of use.

   Note: Only one Refresh Period can be engaged at a time.

7. Click *Save* to save your changes or click *Close* to leave the page without changes taking effect.

To edit the Refresh Period parameters

1. Choose *Data Management* → *Preparation* → *Global Settings*

   The Global Setting screen appears with five tabs:
   General, Systems, **Refresh Period**, Field Labels, and Exchange Rates.

2. Choose the Refresh Period tab.

3. Verify the cycles present are used in your environment.

4. Select a Refresh Period row and click *Edit*.

   A new screen with editable fields appears.

5. (*optional*) Enter a new description.

6. (*optional*) Select the *Active* ☐ if this is to be the current Refresh Period of use.

Note: Only one Refresh Period can be engaged at a time.

7. Click *Save* to save your changes or click *Close* to leave the page without changes taking effect.

To delete a Refresh Period parameters

1. Choose *Data Management* → *Preparation* → *Global Settings*

   The Global Setting screen appears with five tabs:
   General, Systems, **Refresh Period**, Field Labels, and Exchange Rates.

2. Choose the Refresh Period tab.

3. Select a Refresh Period row and click .

To set the field label parameters

1. Choose *Data Management* → *Preparation* → *Global Settings*

   The Global Setting screen appears with five tabs:
   General, Systems, Refresh Period, **Field Labels**, and Exchange Rates.

2. Choose the *Field Labels* tab.

Note: This parameter defines all labels associated in the data model information objects.

3. Choose a *Field Catalog*.
4. Select a Field and Description row.
5. Click *Edit*.

   A name and description screen appears.

6. (*optional*) Change the Field name.
7. Enter a description.
8. Click *Save* to save your changes or click *Close* to leave the page without changes taking effect.

   Note: The Field Label Field names appear as during an operational choice of Related Applications Configuration.

To upload the exchange rates

1. Choose *Data Management* → *Preparation* → *Global Settings*

   The Global Setting screen appears with five tabs:
   General, Systems, Refresh Period, Field Labels, and Exchange Rates.

   Choose the *Exchange Rates* tab.

2. Click

   The Select File screen appears.

3. Choose a file name.
4. Select the delimiter for your environment.
5. Click *Upload*.

Prepare a New Template for Data Upload

This section describes how to create a new template to map your data to an existing template.

Setting Template and Field Mapping Options

Use the Configuration options to set initial default values for xSA before you begin using the data upload and analysis tools.

Upload Administration Options

Use the Upload Administration to map all legacy data fields to like components in the target template.

To map data fields to an existing target template

1. Choose *Data Management* → *Preparation* → *Upload Administration*.

   The New Template Wizard displays the Upload Administration window.

2. In the Selection panel, choose the File Type.
3. Click *Go*.

   In the lower part of the screen, a set of template appear.

4. Choose a Template row. Set the parameters.

   The New Template Step 1: Set Parameters screen appears. Confirm or change the following parameters are set correctly.

   a. Choose the Upload type.

   b. Choose the File type.

   c. Choose the Delimiter.

   d. Choose the Decimal Separator.

   e. Choose the Language.

   f. Choose the (data) File Name.

5. Click *Next*.

   The New Template Step 2: Map Fields screen appears. Confirm or change the following parameters are set correctly.

   The structure of the flat file is displayed on the left side. The structure of the Datasource in BI is displayed on the right side.

   a. Assign the flat file to the Datasource fields.

   b. Sort the fields by clicking on the column name.

   c. Select one or more File Fields. Drag them to the Field column.

   d. (*optional*) Assign key fields as appropriate.

   Note: If the data must be unique, such as a supplier name, select the Key field ☐.

6. Click *Next*.

   The New Template Step 3: Save the Template screen appears.

7. (*optional*) Enter a description.
8. Click *Save*.

   The template browser screen appears.

9. Click ✖ to close the Template Brower screen.

To map data fields to a new target template

1. Choose *Data Management* → *Preparation* → *Upload Administration*.

   The New Template displays the Upload Administration window.

2. Click *New*.

   The New Template Step 1: Set Parameters screen appears. Set the parameters.

   a. Choose the Upload type.

   b. Choose the File type.

   c. Choose the Delimiter.

   d. Choose the Decimal Separator.

   e. Choose the Language.

   f. Enter the (data) File Name.

   Note: The contents of the named data file must match the chosen File Type.

3. Click *Next*.

   The New Template Step 2: Map Fields screen appears.

   The structure of the flat file is displayed on the left side. The structure of the Datasource in BI is displayed on the right side.

   a. Assign the flat file to the Datasource fields.

   b. Sort the fields by clicking on the column name.

   c. Select one or more File Fields. Drag them to the Field column.

   d. (*optional*) Assign key fields as appropriate.

   Note: If the data must be unique, such as a supplier name, select the Key field ☐.

4. Click *Next*.

   The New Template Step 3: Save the Template screen appears.

5. Enter the name and an optional description.

6. Click *Save*.

   The template browser screen appears.

7. Click ✖ to close the Template Brower screen.

Upload Data Collection

The Upload Administration takes four steps to complete.

When the Upload Administration reaches step 4, you must check the status and the progress of all uploads.

You can release successful uploads for integration.

To upload data

1. Choose *Data Management* → *Data Collection* → *Upload Administration*

   The Upload Administration screen appears.

2. Choose an Upload Description row with a Process Status label of In Process.

3. Click *Analyze*

   The Status Monitor screen appears with three tabs to monitor progress status: Status, Messages, and File.

Use Upload Administration to manually check for high quality data transfer.

Upload, Analysis, Integrate and Release Data

To upload the data

1. Choose *Data Management* → *Data Collection* → *Upload Administration.*

   The Upload Administration screen.
2. Click *New Upload*

   The New Data Upload Step 1 screen appears.
3. Choose *Select Upload Type*.
4. Choose *File Type.*
5. Click *Next*.

   The New Data Upload Step 2 screen appears.
6. Select one or more Available Upload Files. Drag them to the selected files column.
7. Click *Next*.

   The New Data Upload Step 3 screen appears.
8. Select a *Template Name*.
9. Select the *Date Order*
10. Select the *Delimiter*
11. Select the *Separator*
12. Select the *Language*
13. Click *Next*.

    The New Data Upload Step 4 screen appears.
14. Select *System Name*.
15. Select *Start option*.
16. Click *Finish*.

    The Process Step Overview appears.
17. Once the Data Collection completes at 100%, close window.

To analyze the upload

1. Choose *Data Management* → *Data Collection* → *Upload Administration.*

   The Upload Administration screen appears.
2. Click *Analyze.*

The Upload Analysis screen appears.

Note: Alternate analysis function is found under Data Management → Data Collection → Upload Analysis.

3. (optional) Click to set a filter.

   The applied filters appear.
4. Click *Integrate.*
5. When process status changes to Completed, Click *Release.*

   Verify the data for each upload. If the data is correct, you can integrate the data. If you set a filter for UploadID, only uploads that are in the UploadID filter are released for classification and reporting (integration).
6. (*optional*) Click to read the messages.
7. (*optional*) Click to set filter, show the key IDs, remove dimensions, or sort by keys.

To integrate the upload

1. Choose *Data Management* → *Data Collection* → *Upload Administration.*

   The Upload Administration screen appears.

   Verify the data for each upload. If the data is correct, you can integrate the data. If you set a filter for UploadID, only uploads that are in the UploadID filter are released for classification and reporting (integration).

   Note: If the process status is “In-Process”, the Integrate button is active.
2. Click *Integrate*

   The Integrate screen appears.
3. Click *Integrate.*
4. (*optional*) Click to read the messages.
5. (*optional*) Click to set filter, show the key IDs, remove dimensions, or sort by keys.

To release the upload

1. Choose Data Management → Data Collection → Upload Administration

   The Upload Administration screen appears.

   Note: If the process status is “Completed” the Release button is active.
2. (*optional*) Click *Release.*

   A status message appears.
3. To access the Status Monitor, click the hyperlinked data name.

Reporting

This chapter describes how to create the analysis tools: reports, dashboards, and briefing books.

Note: First time users must verify and set your default role.

Report Procedures

This section explains how to manage your dashboard.

To create a new report from a blank

1. Choose *New* → *New Report*.
2. A New Report dialog box appears.
3. Select Blank New Report and a Data Source
4. Click Create.

   An Analysis Options utility panel appears on the left side of the window.
4. (*optional*) Choose Show Totals and/or Show Pivot Drop Areas.
5. Select a Dimension. Drag it to the dimension column.
6. Select a Measure. Drag it to the far right -side measure column.
7. (*optional*) Repeat steps 5 through 6 as necessary.
8. (*optional*) Select a date range.
9. Click *Run Report*.
10. Click .

    A Save Reports As panel appears on the left side of the window.
11. Enter the name
12. (*optional*) Enter a description.
13. Choose a folder for the new report by clicking on the folder name.
14. Click *Save*.

To create a new report from an existing

1. Choose *New* → *New Report*.

   A New Report dialog box appears.
2. Select Based on Existing Report and an existing report from the available report folders.
3. Click Create.

   An Analysis Options utility panel appears on the left side of the window.
4. (*optional*) Choose Show Totals and/or Show Pivot Drop Areas.
5. Select a Dimension. Drag it to the dimension column.
6. Select a Measure. Drag it to the far right -side measure column.
7. Select a date range.
8. Click *Run Report*.
9. Click .

   A 'Save Reports As panel appears on the left side of the window.
10. Enter the name
11. (optional) Enter a description.

12. Choose a folder for the new report by clicking on the folder name.
13. Click *Save*.

The new report appears.

To edit a report

1. Choose *Action* → *Open*.

The Content Navigator opens.

2. Choose Reports → *<Folder>* → <*Title*>.

   The Report appears.

3. From the title frame, click ▾.
4. Choose *Analysis Options*.

   An Analysis Options utility panel appears on the left side of the window.

5. (*optional*) Choose Show Totals.
6. (*optional*) Choose Show Pivot Drop Areas.
7. (*optional*) Select one or more Dimensions. Drag them to the dimension column.
8. (*optional*) To create a report with a pivot dimension, select a Dimension. Drag it to the Pivot Area.
9. (*optional*) Select one or more Measures. Drag them to the far right -side measure column.
10. (*optional*) Select a date range.
11. Click *Run Report*.
12. Click 💾.
13. Close the Analysis Options panel.

To set report exceptions

1. Choose *Actions* → *Open*.

   The Content Navigator opens.

2. Choose *Reports* → <Folder> → <*Title*>.

   The report appears.

3. In a measures column, click .

   A view menu appears.

4. Choose *Exception.*

   The Exception dialog box appears.

5. Choose a format type.
6. Choose Format *n* and fill in a related value. For each format, select the exception value.
7. (*optional*) Repeat steps 5 through 6 as necessary for formats 1 through 3.
8. Choose a Fill Color.
9. (*optional*) Enter a text message as a tip.

   Note: The tip appears in the cell of a value matching the format conditions.

10. (optional) Repeat steps 6 through 8 to set format 2 and format 3.
11. Click *OK*.

Report exceptions show on the various cells for that measure in the report.

To clear report exceptions

1. Choose *Actions* → *Open*.
2. Choose *Reports* → *<Title>*.

   The report appears.
3. In a measures column, click .

   A view menu appears.
4. Choose *Clear Exception.*

To set conditions in a report

1. Choose *Actions* → *Open*.
2. Choose *Reports* → *<Title>.*

   The report appears.
3. In a category column, click .

   A view menu appears.
4. Choose *Select Conditions Values…*

   The Select Conditions dialog box appears.
5. Choose condition type:
   - *Specific Range* and range attributes.
   - *Top % or Bottom %* and percentage value
   - *Top N or Bottom N* and the *Top* or *Bottom* rank value.
6. Set the conditional value.
7. Click *OK*.

   The filter settings are displayed under the Applied Filters and Conditions Report roll-down list.
8. (*optional*) Click to hide the filter settings.

To set filters in a report

1. Choose *Actions* → *Open*.
2. Choose *Reports* → *<Title>*.

   The report appears.
3. In a **column header** of a <`commodity dimension`>, click .

   A view menu appears.
4. Choose *Select Filter Values…*

   The Select Values for <`commodity dimension`> dialog box appears.
5. (*optional*) To see the key values along side the text entries, select *Show Key.*
6. Select a value with one of the following:
   - Enter the search string in *Search*. Enter an exact name entry or use a wild-star search, such as "`117`*".
   - Select items in the Browse box. Drag them to the Selected Commodity box.
7. Click *OK*.

   The applied filter and condition settings appears above the report page.
8. (optional) Click to lock the filter for the rest of the session. When you navigate to any report this filter is automatically applied.

To clear filters in a report

1. Choose *Actions* → *Open*.
2. Choose *Reports* → <*Title*>.
3. In a dimension column, click .

   A view menu appears.
4. Select Clear Filter Values.

   The filters are cleared for all cases.

To add analysis options to a report

5. Choose *Actions* → *Open*.
6. Choose *Reports* → <*Title*>

   The report appears.
7. Click .

   The analysis options action panel appears on the left side.
8. (*optional*) Choose show totals and pivot drop area.
9. Select measures and/or dimensions. Drag them to the Report.

   Note: indicates allowable zones to drop dimension or measure.
10. Select *Actions* → *Save* .

To look at report chart options

1. Choose *Actions* → *Open.*
2. Choose *Reports* → <*Title*>

   The report appears.
3. Click .

   The Chart Options menu appears.
4. Choose *Chart Options*.

   The Edit Chart utility panel appears on the left side of the window.

Dashboard Procedures

This section explains how to manage your dashboard. Three dashboards are included out-of-the box and preassembled for you to use.

There is always one dashboard defined as a default dashboard. You can choose a different default dashboard, delete or change the configuration of any predefined dashboard, or create a new dashboard.

Note: The layout of the dashboard cannot be modified, once it has been initially created and saved.

To create a new dashboard

1. Choose New → New Dashboard.

   A Layout Preview window appears with a Select Layout option panel on the left side. The default view is Horizontal Split View.

2. Select the layout style. The Preview changes accordingly.
3. Click *Create*.

   A New Dashboard utility panel appears on the left side of the window.
4. Select a report. Drag it to the dashboard.
5. Repeat step 4 for each dashboard panel.

   Note: If you place two reports in the same report panel, each report will have a titled tab to distinguish it from the other reports.
6. Click .

   A utility panel appears on the left side of the window.
7. Enter a unique name
8. (*optional*) Enter a description of the dashboard.
9. Choose a folder for the new dashboard.
10. Click *Save*.

    The dashboard is added to the root folder.

To change a dashboard

1. Choose *Action* → *Open.*
2. Choose content folder *Dashboard* → *<Folder>* → *<Title>.*

   A Dashboard appears.
3. To resize the report panels, click and drag to resize.
4. Click

   An Add Reports utility panel appears on the left side of the window.
5. You can:
   - Slide the current dashboard sections to new relative locations.
   - Delete a report by clicking .
   - Add reports by dragging and dropping a report to the dashboard. If a report already exists in the particular area where a new report is dropped, a new tab becomes available and the user can access this report in the dashboard by clicking on the tab.

   Note: resizing is only available *prior to* Add Reports utility panel.
6. Click *Close* in the Add Reports panel.
7. Click .

To delete a dashboard

1. Choose *Action* → *Open.*
2. Choose *Dashboard* → *<Title>*.

   A Dashboard dialog box appears.
3. Choose a dashboard.
4. Choose *Action* → *Delete.*

A dialogue box appears.

5. Click *Yes*.

To change the default dashboard

1. Choose *Settings* → *User Preferences.*
2. Choose a Home Dashboard name.

   A Dashboard appears.
3. Click *OK*.
4. Choose *Settings* → *Content Navigator View.*

   Your new dashboard choice appears.

Briefing Book Procedures

This section explains how to manage briefing books.

To create a new briefing book

1. Select *New* → *New Briefing Book*
2. Enter the name and description.
3. In the Save In box, click ▸ to select a folder.
4. Click *Create.*

To select default briefing book

1. Select ▾
2. Select "*Change Default Book*."

   A dialog box appears.
3. Select a briefing book.
4. Click *OK*.

To add a report to a briefing book

1. Choose *Actions* → *Open*.
2. Choose *Reports* → *<Folder>* → *<Title>*.

   The report screen appears.
3. Select .

To change a briefing book page titles

1. Choose *Actions* → *Open*.
2. Choose *Briefing Books* → *<Title>*.

   The book view appears.
3. To change a page title, click directly on the current title.

   A text box appears.
4. Enter the new title.
5. Click *Enter*.
6. Click .
7. To close the book, select *Actions* → *Close*.

To view thumbnail images of a briefing book pages

1. Choose *Actions* → *Open.*
2. Choose *Briefing Books* → *<Title>.*

   The book view appears.

3. To see all of the briefing book pages as thumbnails, click .

   The thumbnail image of each page appears in a row.

4. To close the book, select *Actions* → *Close*.

To reorder the briefing book pages

1. Choose Actions → Open.
2. Choose Briefing Books → <Title>.

   The book view appears.

3. To see all of the briefing book pages as thumbnails, click .

   The thumbnail images of each page appears in a row.

4. To reorder the page order, drag and drop each page to the new location.
5. Drag and drop the page to the new order position.
6. Click .
7. To close the book, select *Actions* → *Close*.

To delete a briefing book

1. Choose *Actions* → *Open*.
2. Choose Briefing Books → <Title>

   The book view appears.

3. Choose *Actions* → *Delete*.

Reference Section

This chapter describes the xSA icons, fields, buttons, and choices for each available view. Some options are role-dependent; some options are only in view mode for certain roles.

Icon Functions

These icons are ever present at the top of the secondary screen, such as the

Content Navigator

Use the content navigator to organize and manage your folders content dashboards, reports or briefing books.

Log History Messages

Use the log history messages to view up to one hundred log messages.

Show Full Screen View

Full Screen mode is the ability to open the browser screen to the full monitor size.

Note: While in full screen mode, you can*not* type entries into the xSA.

Comment

Use the annotation function to add a lasting comment to a report.

1. Click on to add text to the annotation file.
2. Click *New* or select a previous message and click *Reply*.

The text you enter in the annotation field stays locally associated with the current report.

Export

PDF

Use the PDF export function to create a file outside of xSA.

1. Click on to execute the export to PDF function.

   After the time elapse bar fills on the bottom of the frame, a pop-up appears.

2. Choose Open, Save, or Cancel.

A graphic is created with the xSA chart . There are no mathematical functions embedded in the Excel file.

Excel

Use the Excel export function to create a file outside of xSA.

1. Click on to execute the export to Excel function.

   After the time elapse bar fills on the bottom of the frame, a pop-up appears.

2. Choose Open, Save, or Cancel.

A table is created with the xSA chart values. There are no mathematical functions embedded in the Excel file.

Save

Use the save function to save your current work seen on the top level of the xSA desk top.

E-Mail

Use the e-mail function to send your current work seen on the top level of the xSA desk top to a known e-mail address.

Note: Refer to the xApp Spend Analytics Installation Guide for xSA e-mail setup information.

Menu Options

All the menu bar features and content navigator are defined in this section.

Root Map Menus and Commands

Menu	Command	Description
New		
	Report	Used to create new reports.
	Dashboard	A collection of reports displayed on your desktop.
	Briefing Book	Used to create new briefing book.
Actions		
	Open…	Opens Folders; you can also open Folders by clicking the Folder icon in upper right corner of menu bar.
	Email…	Opens email service.
	Save	Saves the current item.
	Save as	Saves the current file under a different title.
	Rename	Renames the current item.
	Delete	Deletes the current item.
	Share	Sets the view and edit access level to *public* so that it appears under the public folder of the Content Navigator. All users can see this item when it is set to *share*. The *unshare* option appears when the item is set to share. You can remove the item from public access by using the *unshare* option.
	Close	Closes the current item.
Favorites		List of most used items and folders for this user.
	Add to Favorites	Adds the current object (Report, Dashboard or Briefing Book) to favorites.
	Organize Favorites	Rearranges favorites.
	Edit Dimension Favorites	You can organize the favorites for various dimensions.
	Reports	You can view a report that was previously marked as a favorite.
	Dashboards	You can view a dashboard that was previously marked as favorite.
	Briefing Books	You can view a briefing book that previously was marked as favorite.
Quick Links		User-defined list from Settings → Quick Links Configuration.
Settings		

Menu	Command	Description
	User Preferences	Sets the role, data source and graphical environment for each user.
	Organize Content	Opens Select Folder and Content Tree panels; sets tree names and locations for current user. This option is only available to administrators.
	Refresh Content Navigator View	Update content view to see new tree entry.
	Related Applications Configuration	Sends selected data from a report to a Web application.
	Quick Links Configuration	Create a link to send selected data from a report to a Web application.
Data Management		
	Data Collection	Menu options are Upload Administration and Upload Analysis.
	Preparation	Menu options are Template Browser and Global Settings.
	Data Transfer	Used to export and import files; options are Master Data and Transaction Data.
Help		
	User Guide	Web link to the User Guide.
	About xApp Spend Analytics	Displays information about Spend Analytics.

New Menu

Create new reports, dashboards, and briefing books.

Menu	Command	Description
New		
	Report	Used to create new reports.
	Dashboard	Tailor dashboards to display snapshots of current financial data movements.
	Briefing Book	Used to create new briefing book.

Report Menu

The Report Menu options are Analysis, <title> Report, Save Report As, and Annotations.

New → Report

Report Menu Options Panel

Option	Description
Blank New Report	If **Blank New Report** is selected, the *Data Source* selection box becomes active; lists available data sources, such as Contract Age, Classification, or Spend Analysis.

Based on Existing Report	If **Existing Report** is selected, *Select Report* becomes active. Reports organized by: Organization, Top Spend, Supplier, Commodity, Supplier, Geography, Organization, or Time. Your selection opens a sub-menu of options.

Report Menu Buttons

Button	Description
Create	Creates a new report.
Cancel	Cancels the action.

Report: Analysis Options Panel

New → Report → Blank New Report → Create button → Analysis Options Panel

Field	Description
Show Totals	If selected, totals are displayed.
Show Pivot Drop Area	If selected, area for dropping a dimension appears.
Dimensions	Lists the dimensions for the report, such as Business Unit, Commodity, or Fiscal Year. The dimension selected determines the measures displayed and becomes the first column header in the <title> *Report* panel.
Measures	Lists the measures for the report, such as Buyer Count, PO Count, or Project Planed Spend. The measures become the rest of the column headers in the *<title> Report* panel.

Report: <title> Report Panel

New → Report → Blank New Report → Create button → <title> Report

Field	Description
Date	Select from the drop-down menu (All, Between, Before, After, Year To Date) or enter a range of dates.
Run Report	Create the report after all values have been entered. When run, the Dimensions column has a filter icon with options such as select Filter Value, Show Key, or Sort Options, and the Measures columns have a measures icon with options such as Select Conditions Value, Remove Measure, or Exception. Dragging your mouse over individual items in the report causes a related menu to appear.
Pivot Area	Shows in the Analysis Options panel if selected.
Report columns	Number of columns is determined by the number of measures and dimensions selected.

Report: <title> Report Panel Icons

Name	Usage
Analysis Options	Add dimensions/measures/filters to report.
Comments Annotations	Users can add comments to a report, facilitating collaboration.
Display/Hide Report Table	Presents the data grid to the user.

Show/Hide Charts	Presents the data in chart form to the user.
Down Arrow	Activates Chart Options drop-down menu.
Save	Saves changes.
Email	Opens email service.
PDF	Export to PDF.
Excel	Export to Excel.
Briefing Book	Send to Briefing Book.
Down Arrow	Change Default Book.

Report: Save Report As Panel

If you select the Save icon in the <title> Report panel, the Analysis Options Panel is replaced by the Save Report As panel.

New → Report → Blank New Report → <title> Report → Save icon → Save Report As

Field	Description
Name	Name the report; title bar in the <title> Report panel changes to supplied name.
Description	Input a description of the report.
Save in	Select the folder the report is to be saved in.

Report: Save Report As Panel Buttons

Button	Description
Save	Saves the report in the selected folder.
Cancel	Cancels any edits made to the report.

Report: Annotations Panel

The Annotations Panel appears when you select the Comments icon on the <title> Report panel. Report must be saved first.

New → Report → Blank New Report → <title> Report → Comments icon → Annotations

Field	Description
New	If selected, a new annotation window appears.
Reply	If selected, insert your comments.
View	Select either the table of comments or the tree of previous commentators.
Table of previous annotations	Table has headings of Subject, Author, and Date of comment.
Subject	Subject of annotation you are replying to.
Author	Insert your name.
Date	Date you are adding your comments.

Report: Annotations Panel Buttons

Button	Description
Close	Close the Annotations panel.

New: Dashboard

Chose New Dashboard under the New menu options. A layout Preview window appears with a New Dashboard Select Layout option panel on the left side.

Dashboard Panel

New → Dashboard

Field	Description
Select Layout	Options to select are: Horizontal Split View, Vertical Split View, Single View, Hierarchical Quad View, Quad View, and Hierarchical Tri View.
Layout Preview	Previews chosen layout.

Dashboard Panel Buttons

Button	Description
Create	Creates a new report.
Cancel	Cancels the action.

Dashboard: Add Reports Panel

New → Dashboard → Create button → Add Reports Panel

Field	Description
Select Reports	Options are Reports and Share Reports.

Dashboard: Add Reports Panel Buttons

Button	Description
Close	Closes the panel.

Dashboard: <Dashboard> Panel

New → Dashboard → Create button → <Dashboard> Panel

Field	Description
Untitled Dashboard	Layout determined by Select Layout in Dashboard Panel; selected reports can be dragged into the dashboard layout.

Dashboard: <Dashboard> Panel Icons

Icon	Description
Email	Email the current view.
Add Reports	Add reports.
Save	Save the current view.
Briefing Book	Put the current view into a Briefing Book.

Down Arrow	Activates default Briefing Book options drop-down menu.

Dashboard: <Dashboard: Report> Panel Icons

Icon	Description
Analysis Options	Add dimensions/measures/filters to report.
Display/Hide Report Table	Presents the data grid to the user.
Show/Hide Charts	Presents the data in chart form to the user.
Down Arrow	Activates Chart Options drop-down menu.
Close	Close.

New: Briefing Book Panel

New → Briefing Book

Field	Description
Name	Enter the name for the new briefing book.
Description	Enter a description that characterizes the briefing book.
Set as default	If selected, makes this briefing book the default briefing book.
Save in	Select a folder to save this briefing book in.

New: Briefing Book Panel Buttons

Button	Description
Create	Creates a new report.
Cancel	Cancels the action.

Actions Menu

You can use these general actions.

Action	Description
Open…	Opens Folders; you can also open Folders by clicking the Folder icon in upper right corner of menu bar.
Email…	Opens email service window.
Save	Save the current item.
Save as	Save the current file under a different title.
Rename	Rename the current item.
Delete	Delete the current item.
Share	Set the view and edit access level to *public* so that it appears under the public folder of the Content Navigator. All users can see this item when it is set to *share*. The *unshare* option appears when the item is set to share. You can remove the item from public storage by using the *unshare* option.
Close	Close the current window.

Actions: Email Window

Actions → Email

Field	Description
To	Enter addressee name.
Subject	Enter subject of email.
Message	Body of email message.
Attach link to dashboard checkbox	If selected, your dashboard is email-enable.

Actions: Email Panel Buttons

Button	Description
Send	Send the email message.
Cancel	Cancels the email.

Favorites Menu

You can save your favorite collections here.

Menu	Command	Description
Favorites		
	Add to Favorites	Add current file to favorites list.
	Organize Favorites…	Reorganize favorites list.
	Saved Filters…	Edit the dimension filters.
	Reports	Opens Select pop-up menu; options are New Report or list of existing reports.
	Dashboards	Opens Select pop-up menu; options are New Dashboard or list of existing dashboards.
	Briefing Books	Opens Select pop-up menu; options are New Briefing Books or list of existing briefing books.

Favorites: Organize Favorites

Favorites → Organize Favorites

Tab	Description
Reports	Lists favorite reports.
Dashboards	Lists favorite dashboards.
Briefing Books	Lists favorite briefing books.

Organize Favorites Panel Buttons

Button/Icon	Description
OK	Save organization.
Cancel	Cancels the action.

Trash icon	Send file to trash, i.e., delete file.

Favorites: Dimension Favorites

Favorites → Saved Filters

Field	Description
Data Source	Data Source drop-down; options include: Spend Analysis, Contract Age and Price Variances
Dimensions	Dimensions depend on data source selected. Options include Category, Supplier, Business unit.
[Additional Panel]	Dependent on selected dimension.

Favorites: Dimension Favorites Panel Buttons

Button/Icon	Description
OK	Save organization.
Cancel	Cancels the action.
New icon	If clicked, opens Filter: Select Values for [selected dimension] window
Edit icon	If clicked, opens Filter: Select Values for [selected dimension] window
Trash icon	Send file to trash, i.e., delete file.

Favorites: Dimension Favorites: Filter: Select Values Window

Favorites → Saved Filters → New or Edit icon → Filter: Select Values for [selected dimension] window

Field	Description
[filter value]	Limits selections in Browse list.
Show Key	If selected, shows U.S. product code in Browse list.
Browse list	Available values for the selected dimension from previous window.
Selected Values	Values selected from Browse list.

Favorites: Dimension Favorites: Filter: Select Values Window Panel Buttons

Button/Icon	Description
OK	Save organization.
Cancel	Cancels the action.

Quick Link Menu

Menu	Command	Description
Quick Link		User-defined list from Settings → Quick Links Configuration.

Settings Menu

Settings Menu	Command	Description
	User Preferences	Set the role, data source and graphical environment for each user.
	Organize Content	Opens Select Folder and Content Tree panels; sets tree names and locations for current user. This option is only available to administrators.
	Refresh Folder	Update folder view to see new folder entry.
	Related Applications Configuration	Send selected data from a report to a Web application.
	Quick Links Configuration	Creates a link to send selected data from a report to a Web application.

Settings: User Preferences

Set the role, data source and graphical environment for each user.

Settings: User Preferences Menu

Settings → User Preferences

Field	Item	Input
General		
	Data Source	The overall xSA data model is grouped into subsets of metrics for specific analyses. Among the options are Spend Analysis, Contract Age, Expiring Contracts, Price Variances, and Price Optimizations.
	Primary Role	Among the options are Administrator, Data Manager, and Procurement Executive; user-defined.
Dashboard		
	Home Dashboard	User-defined list of dashboards.
Report		
	Annotation View	Select Table or Navigation Content.
	Chart Gridlines	Options are Default, Vertical lines, Horizontal lines, Grid lines, Horizontal Patterns, Vertical Patterns, or None.
	Animate Charts	Smooth transition between graphics.
	Show Chart Legend	Shows the legend for the chart.
	Show Totals in Table	Shows the totals in a table.

Settings: User Preferences Buttons

Button	Description
OK	Saves settings.
Cancel	Deletes changed settings.

Settings: Organize Content

This option is only available to administrators.

Settings → Organize Content

Field	Item	Input
Organize Folder Panel		
	Root Folder	Drop-down menu lists available root folders.
	[Untitled list]	List of selected root folder contents.
[Edit Root Folder] Panel		
	Name	Name of new folder; only alphanumeric characters valid.
	Description	Description of new folder.
	Available Content	Content depends on selected element of root folder.
	Selected Content	Folder content is determined by dragging items from the Available Content box.
	Name	Folder name.
	Description	Folder description.
	Type	Type of folder.
	Modified	When folder was created or folder contents changed.
	Modified By	Person who modified folder contents.
	Owner	Person who owns the folder.
	Sharing Status	Options are Private or Public.

Settings: Organize Content Buttons/Icons

Button	
New Folder	Create a new folder.
Delete Folder	Delete new folder.
New icon	If clicked, the Create New Content Tree (root folder) pop-up appears.
Save icon	Save the changes.
Close icon	Close the current window.

Organize Content: Create New Content Tree

Settings → Organize Content → New icon → Create New Content Tree

Item	Input
Folder Name	Type in new root folder name.
Description	Type in description of new root folder.

Organize Content: Create New Content Tree Buttons

Button	Description
OK	Saves input.
Cancel	Deletes input.

Settings: Related Applications Configuration Menu

Set the parameters to send selected data from a report to a Web application.

Settings → Related Applications Configuration

Field	Input
[Application Table]	Headings include Application Name, Transaction Name, and Source System Name.
Application Name	Options include SRM (supplier relationship management), ERM (employee relationship management), CRM (client relationship management).
Transaction Name	Name of type of transaction.
Source System Name	A given transaction can be provided by different physical source systems, which have different IP addresses.
Link URL	A parameterized URL is the URL to the source system. Any parameters to be filled in by xSA should be entered within angle brackets <>, inside the URL.
Transaction Attribute	Value is from the bracketed parameter in the link URL.
xSA Dimension	Drop-down menu created by clicking the Generate Attributes button.

Settings: Related Applications Configuration Buttons/Icons

Button	Description
Apply	Apply parameters.
Cancel	Cancel input.
Generate Attributes	Clicking on this button creates the xSA Dimension drop-down menu.
New icon	Create a new file.
Copy icon	Copy an existing file.
Trash icon	Send file to trash, i.e., delete file.

Settings: Quick Links Configuration Menu

Create a link to send selected data from a report to a Web application.

Settings → Quick Link Configuration

Field	Input
Application Name	List of existing applications.
URL	List of existing links.
Related Applications table	Headings are Application Name and URL.

Settings: Quick Links Configuration Buttons/Icons

Button	Description
Apply	Apply parameters.
Cancel	Cancel input.
New icon	Create a new file.
Trash icon	Send file to trash, i.e., delete file.

Data Management Menu

This section defines each option and feature in the Data Management menu bar options.

Menu	Options	Description
Data Management		
	Data Collection	Menu options are Upload Administration and Upload Analysis.
	Preparation	Menu options are Template Browser and Global Settings.
	Data Transfer	Menu options are Master Data and Transaction Data.

Data Collection: Upload Administration

You can watch the progress and verify the status of the uploaded data.

Data Management → Data Collection → Upload Administration

Panels	Fields	Description
Advanced Find		Filters are determined by upload type selected: options are Master Data, Transaction Data, Buyer, Suppliers. The following fields are filters for Transaction Data.
	System Name	Name supplied in the Schedule Upload screen.
	Refresh Period	Select from Refresh Period list.
	Owner	System owner.
	Upload Type	Options are Analytical Master Data, Transaction Data, ERP Master Data, or all.
	Date from/to	Give the beginning and ending dates for the desired data.

Uploads		Number of uploads available in the system, depending on the chosen filter.
Overview table		Headings are determined by upload type selected. The following are headings for Transaction Data.
	Upload Description	Description of data being uploaded.
	Process Step	Current step of upload.
	Process Status	Status of upload.
	System	Name supplied in the Schedule Upload screen.
	Refresh Period	Supplied in Filter panel.
	Upload Date	Date data is uploaded.
	Upload Time	Time data is uploaded.
	Owner	System owner.

Data Collection: Upload Administration Buttons

Button	Description
Go	If clicked, uploads will be displayed based on chosen filter values.
Clear	Resets filter values.
New Upload	Starts a new data upload.
Analyze	Report is shown based on the chosen upload (available only for Transaction data). When clicked, the Status Monitor window opens.
Integrate	Upload will be loaded from the inbound layer to the integration layer (available only for Transaction data). The Integrate window opens.
Release	Upload will be loaded from the integration layer to the reporting cubes (available only for Transaction data).
Override Status	Overrides status of a *failed* upload and changes it to *completed*. If selected, a warning pop-up is generated; you must click OK or Cancel.
Change Process Step	Changes the process step of a failed upload. If selected, a warning pop-up is generated; you must select a different process step and click OK, or click Cancel.
Delete	Deletes a log entry for an upload. If selected, a warning pop-up is generated; you must click OK or Cancel.
Select icon	Opens Select File window.

Upload Administration: Select File Window

Data Management → Data Collection → Upload Administration → Select icon → Select File window

Field	Description
File Name	List of files to select from.

Upload Administration: Select File Buttons

Button	Description
OK	Saves list of selected files.
Cancel	Deletes list of selected files and closes window.

Data Collection: Status Monitor View.

The Status Monitor has three tabs: Status, Messages, and Uploaded Files.

Data Management → Data Collection → Upload Administration → Analyze button → Status Monitor → Status tab

Panels	Fields	Description
Process Step Overview		Filters are determined by upload type selected: options are Master Data, Transaction Data, Buyer, Suppliers. The following are filters for Transaction Data.
	Upload Description	Name supplied in the Schedule Upload screen.
	Owner	System owner.
	System ID	Name supplied in the Schedule Upload screen.
	Refresh Period	Supplied in Filter panel of the Upload Administration screen.
	Process Step	Name of current process step.
	Status	Status of current process step.
Details: Process Step		Details relating to the current process step.
	Progress	Percentage of step completed.
	Start Time	Time current step of upload began.
	End Time	Time current step of upload ended.
	Data Records	Number of records currently loaded.
	Job Name	Name of job in progress.
Overall Status		Overall status of job in progress in graphic format.

Data Collection: Upload Analysis View

Data Management → Data Collection → Upload Analysis

Panels	Fields	Description
Analysis table		Headings are determined by upload type selected. The following are headings for Transaction Data.
	Upload ID	Name of upload job.
	Supplier Invoice Net Amount	Amount invoiced by supplier.
	Purchase Order Amount	Amount listed on purchase order.

Data Collection: Upload Analysis Buttons

Button	Description
Integrate	Upload will be loaded from the inbound layer to the integration layer (available only for Transaction data).
Options icon	Set filter options.

Preparation Menu

The options for the Preparation Menu are Template Browser and Global Settings.

Data Management → Preparation

Preparation: Template Administration

Data Management → Preparation → Template Administration

Panels	Fields	Description
Find		
	Template Name	User-defined template name.
	File Type	Some options are: All, Invoices, Contracts, Buyer, Buyer Organization, Supplier, ERP Products.
Templates		Number of templates shown.
Overview table		
	Template Name	User-supplied template name.
	Description	Description of template.
	File Type	Supplied in Selection panel (see above).
	Delimiter	Symbol separating items; choices are semi-colon, comma, and colon.
	Decimal Separator	Use decimal as date order delimiter.
	Date Order	Given as Day-Month-Year, Month-Day-Year, Year-Month-Day.
	Owner	System owner.

Preparation: Template Administration Buttons

Button	Description
Go	If clicked, uploads will be displayed based on chosen filter values.
Clear	Resets filter values.
New Template	If clicked, opens New Template window.
Copy	Copy template and save as a new name.
Delete	Delete template.

Template Administration: New Template Step 1 Window: Set Parameters

Data Management → Preparation → Template Administration → New Template button → New Template Step 1 window: Set Parameters

Fields	Description
Upload Type	Options are Analytical Master Data, Transaction Data, ERP Master Data, or all.
File Type	Name supplied in the Select File Type dropdown screen, such as Supplier or Category.
Date Order	Given as Day-Month-Year, Month-Day-Year, Year-Month-Day.
Delimiter	Symbol separating items; choices are semi-colon, comma, and colon.

Decimal Separator	Use decimal as date order delimiter.
Language	Select English or other available languages.
File Name	Click the Select icon to open Select File window; match file to Upload type.

Template Administration: New Template Step 1 Window Buttons/Icon

Button	Description
Previous	Return to previous screen.
Next	Go to next screen.
Save	Save parameters.
Cancel	Cancel parameters.
Select icon	Opens Select File window.

Template Administration: New Template Step 2 Window: Map Fields

Data Management → Preparation → Template Administration → New Template Step 1 window → Next button → New Template Step 2 window

Fields	Description
File Fields	The structure of the flat file is displayed on the left side; drag one or more field names into the Field column on the right.
Data Field Mapping	Datasource structure in BI; column headers include Field, Field is Key, Data Source Field, Description, Data Type, and Length.

Template Administration: New Template Step 2 Window Buttons

Button	Description
Previous	Return to previous screen.
Next	Go to next screen.
Save	Save parameters.
Cancel	Cancel parameters.

Template Administration: New Template Step 3 Window: Save Template

Data Management → Preparation → Template Administration → New Template Step 2 window → Next button → New Template Step 3 window

Fields	Description
Template Name	Name of new template.
Description	Description of new template.

Template Administration: New Template Step 3 Window Buttons

Button	Description
Previous	Return to previous screen.
Next	Go to next screen.
Save	Save parameters; pre-populated Template Administration window reappears.
Cancel	Cancel parameters.

Preparation: Global Settings

You must set the global parameters for your environment before you use xSA for the first time. Global Settings menu includes tabs for Systems, Refresh Period, General, Field Labels, and Exchange Rates.

Data Management → Preparation → Global Settings.

Preparation: Global Settings: General Tab

Set general parameters.

Data Management → Preparation → Global Settings → General tab.

Panel	Fields	Description
Collection		
	Import Folder	
	Export Folder	Enter export folder pathname defined by Transfer External Data procedure.
	Generated Files	Enter Generated Files name.
	Application Server	Enter Application Server name.
Data Transfer		
	Delimiter dropdown	Symbol separating items; choices are semi-colon, comma, and colon.
	Escape sign dropdown	Select the escape sign to use.
Reporting		
	Reporting Currency dropdown	Select reporting currency type.
Transport Settings		
	Default Package	Enter Default Package name.
	Default Transport Request	Enter Default Transport request.

Preparation: Global Settings: General Tab Buttons

Button	Description
Edit	Edit existing file.
Save	Save existing file.

Preparation: Global Settings: Systems Tab

Initial view of Global Settings.

Data Management → Preparation → Global Settings → Systems tab.

Fields	Description
System Name	Enter unique system name, maximum of ten alpha-numeric characters, or choose a System Name row and click *Edit*.
Master Data System	Select a Master Data System from drop down menu.
System ID	System ID is generated.
Owner	Enter owner name, maximum of twelve alpha-numeric characters.

Change Date	Change date is generated.
Delete	Delete function.

Preparation: Global Settings: Systems Tab Buttons

Button	Description
New	Create new file.
Edit	Edit existing file.
Trash icon	Delete row.

Preparation: Global Settings: Refresh Period Tab

Set Refresh Period parameters.

Data Management → Preparation → Global Settings → Refresh Period tab.

Fields	Description
Refresh Period	Click New or select a Refresh Period row.
Description	Add description of selected Refresh Period.
Status	Options are Active or Inactive
Delete	Delete function.

Preparation: Global Settings: Refresh Period Tab Buttons

Button	Description
New	Create new file.
Edit	Edit existing file.
Trash icon	Delete row.

Preparation: Global Settings: Field Labels Tab

Set the field label parameters.

Data Management → Preparation → Global Settings → Field Labels tab.

Fields	Description
Field Catalog	Options are Attributes of Persona, Attributes of Matters, Document, Organization, Product/Category, Supplier, and xApp Spend Analytics.
Field	Object of attributes selected; the field appears in Settings: Related Applications Configuration as an xSA Dimension
Description	Description of the field.

Preparation: Global Settings: Field Labels Tab Buttons

Button	Description
Edit	Edit existing file.

Preparation: Global Settings: Exchange Rates Tab

Set the exchange rate parameters.

Data Management → Preparation → Global Settings → Exchange Rates tab.

Fields	Description
File Name	Enter a file name or select file name from list.
Delimiter	Symbol separating items; choices are semi-colon, comma, and colon.

Preparation: Global Settings: Exchange Rates Tab Buttons/Icons

Button	Description
Upload	Upload selected file.
Select icon	Opens Select File Window

Global Settings: Select File Window

Data Management → Preparation → Global Settings → Exchange Rates tab → Select icon → Select File window

Fields	Description
File Name	Select file name from list.

Global Settings: Select File Window Buttons

Button	Description
OK	Keep selected file name.
Cancel	Cancel file selection.

Data Transfer

Options are Master Data, and Transaction Data.

Data Management → Data Transfer

Data Transfer: Master Data Transfer

Data Management → Data Transfer → Master Data.

Panels	Fields	Description
File Selection		
	File Type	Name supplied in the Select File Type dropdown screen, such as Supplier or Category.
	File Name	Select icon opens Select File window.
	Field	Select icon opens Select Field window.
	Include	Values are Include or Exclude.
	Equal To	Values are Equal To or Between.
	Low	Select icon opens Select Value window.
	High	Select icon opens Select Value window.
Messages		System messages.
Description table		Click on Refresh button to fill in message description table with status and description of Master Data Transfer progress.

Data Transfer: Master Data Buttons

Button	Description
Select icon	Opens Select File, Select Field, or Select Value window.
Export	Export files; if clicked, status and description columns of Description Table are populated with messages.
Import	Import files; if clicked, status and description columns of Description Table are populated with messages.
Refresh	Update messages screen.

Data Transfer: Transaction Data Transfer

Choose Data Management → Data Transfer → Transaction Data.

The Transaction Data Transfer window appears.

Panels	Fields	Description
File Selection		
	File Name	Select icon opens Select File window.
Messages		System messages.
	Description table	Click on Refresh button to fill in message description table with status and description of Transaction Data Transfer progress.

Data Transfer: Transaction Data Buttons

Button	Description
Export	Export files; if clicked, status and description columns of Description Table are populated with messages.
Import	Import files; if clicked, status and description columns of Description Table are populated with messages.
Refresh	Monitor export or import process.
Select icon	Opens Select File window.

Help Menu

The help menu has two information functions: the documentation, such as this book, and also to define the product release version and date of release. This documentation is designed to download and save for the purpose of either print to read or to read on-line.

Menu	Command	Description
Help		
	User Guide	Web link to the User Guide which contains a quick guide reference, the root menu option reference section, configuration policies, administrative information and spend the data management and reporting information using xSA.
	About xApp Spend Analytics	Displays information about the current installation of xApp Spend Analytics.

Appendix A: User Name Sheet

This appendix defines the xSA user parameters for the Login names.

SAP_XA_ADMINISTRATOR

SAP_SXA_DATA_MANAGER

SAP_SXA_COMMODITY_MANAGER

SAP_SXA_PROCUREMENT_EXECUTIVE

Note: Copy this set up table and make notes in it for your workflow and records.

Table 2: Username and roles set up table

First Name	Last Name	Login	Role • ADMINISTRATOR • DATA_MANAGER • COMMODITY_MANAGER • PROCUREMENT_EXECUTIVE
<12345678901234>	<12345678901234567890>	<1234567>	<*Role* from list>

Appendix B: System Configuration Sheet

xSA comes with a pre-defined set of roles which can be assigned to users according to their tasks and responsibilities. xSA defines each role with have particular levels of authorizations and tool use within the application. Refer to the xApp Spend Analytics Installation Guide for instructions. You can use the following configuration set-up table for your records

You need to set up users and define their roles within xSA. The following table is a checklist of the Configuration options you use to set up the xSA system for your company.

Note: Copy this set up table and make notes in it for your workflow and records.

Table 3: xSA preparation and set up table

SYSTEM ADMINISTRATOR

Settings	Page	☑	Configuration	Comments and Notes
Users		☐	See xApp Spend Analytic Installation Guide.	This is set at SAP. Send the User Name request sheet to your Technical Support Representative. Setting up initial user names is produced through the SAP R/3 system. Users can have more than one role.
E-mail name		☐	See xApp Spend Analytic Installation Guide excerpt in Append .	E-mail account is necessary for e-mail export.
Navigation Trees		11		This is set at SAP. Request for a R/3 change Roles with [pfcg] transaction from your Technical Support Representative. The tree names reflect the data content to be associated with them. .
		☐	SAP_XA_NEWTREE	
		☐		
		☐		
		☐		
Roles			See xApp Spend Analytic Installation Guide.	This is set at SAP. Send the role request sheet to your Technical Support Representative.
		☐	SAP_XA_ADMINISTRATOR	
		☐	SAP_SXA_DATA_MANAGER	
		☐	SAP_SXA_COMMODITY_MANAGER	
		☐	SAP_SXA_PROCUREMENT_EXECUTIVE	

	Settings	Page	☑	Configuration	Comments and Notes
SYSTEM ADMINISTRATOR	FTP		☐	IP address, Import folder path, login and password	See the xSA Installation Guide
	Global Settings				See the xSA Installation Guide
	System	16	☐		
	Refresh Period	16	☐		.
	General	16	☐	Import folder path	
			☐	Export folder path	
			☐	Application server name	
	Folders	16	☐		
	Transport	16	☐	Field Labels – can set labels for custom fields	
	Outbound Integration		☐	Exchange Rates - check your exchange rate data file in the Import folder	.
			☐	Currency	
DATA MANAGER	Templates				
		19	☐	Out-of-the-box template verification	
				☐ Transaction Data OK	
				☐ Master Data OK	
				☐ Analytic Master Data OK	
				☐ SRM Inbound Integration OK	
			☐	Create new templates? Yes___, No___	
				☐ My Transaction Data	
				☐ My Master Data	
				☐ My Analytic Master Data	
				☐ My SRM Inbound Integration	

Appendix C: Related Application Sheet

Note: Copy this table and make notes in it for your workflow and records.

Table 4: xSA related application set up table

Application name 1		
Application name 2		
Transaction name 1		
Transaction name 2		
Transaction name 3		
Transaction name 4		
Source system	Name	A given transaction can be provided by different physical source systems. These different source systems have different IP addresses.
	URL	A parameterized URL is the URL to the source system. Any parameters to be filled in by xSA should be entered within angle brackets, inside the URL
	Name 1	
	URL 1	
	Name 2	
	URL 2	
Transaction attribute		

Appendix D: Out of the Box Report Analysis Information

This appendix describes every out-of-the-box analyses available in xSA Content Navigator.

They are pre-defined by twelve main analysis categories. Dimensions and measures define the sub-categories. See Table 5 for reference.

Table 5: Dimension used for OOB report analysis folder names

No.	Dimension Folder Basis
1	Spend
2	Spend Trend
3	Off Contract Spend
4	Invoice Price Variance
5	Purchase Price Variance
6	Item Price Variance
7	Supplier Item Price Variance
8	Supplier Price Optimization
9	PO price Optimization
10	Contract
11	Projects
12	Programs

Table 6 shows the report analysis categories by folder names, dimensions and the measures common to each:

Table 6: Out-of-the-box report analysis

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
1. Spend	Analyze the Total Spend Amount by`<dimension>` that is not associated with a contract.		
		Spend by Commodity	Total Spend Amount Minimum Contract Amount Weighted Avg. Unit Price (item level) Min. Unit Price (item level) Max. Unit Price (item level) Quantity (item level) UOM (item level) Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option) Running total (shown as a display option, trend reports only) over time+A11
		Spend by Category	Total Spend Amount Minimum Contract Amount Weighted Avg Unit Price (item level) Min. Unit Price (item level) Max. Unit Price (item level) Quantity (item level) UOM (item level) Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name <folder name> by <dimension>	Measures
		Spend by Supplier	Total Spend Amount Quantity Commodity Count Category Count Item Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Spend by Business Unit	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Spend by Cost Center	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Spend by General Ledger Account	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name **<folder name>** by **<dimension>**	Measures
		Spend by Contract Age	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Spend by Expiring Contracts	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Spend by Organization Geography	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Spend by Supplier Geography	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
		Spend by Buyer	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Spend by Projects	Total Spend Amount Category Count Item Count Supplier Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Spend by Project Status	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Spend by Low Cost Country Source	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
2. Spend Trend	The total spend displayed quarter over quarter for the last 12 months		
		Trend by Commodity	Total Spend Amount Minimum Contract Amount Weighted Avg. Unit Price (item level) Min. Unit Price (item level) Max. Unit Price (item level) Quantity (item level) UOM (item level) Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option) Running total (shown as a display option, trend reports only) over time+A11
		Trend by Category	Total Spend Amount Committed Spend Amount Weighted Avg. Unit Price (item level) Min. Unit Price (item level) Max. Unit Price (item level) Quantity Commodity Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count
	Diversity Supplier Spend Trend Analysis	Trend by Diversity	Committed Spend Amount Quantity Commodity Count Category Count Item Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
		Trend by Business Unit	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Trend by Cost Center	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Trend by General Ledger Account	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Trend by Organization Geography	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
		Trend by Supplier Geography	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Trend by Buyer	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Trend by Projects	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Trend by Project Status	Total Spend Amount Commodity Count Category Count Item Count Supplier Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
3. Off Contract Spend	Supplier Item Price Variance by `<dimension>`. Total spend where the PO is not associated with a contract ID.		
		Off Contract by Commodity	Total Spend Amount Total Off-contract Spend Amount Off-Contract Spend % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option)
		Off Contract by Category	Total Spend Amount Total Off-contract Spend Amount Off-Contract Spend % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Commodity Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option)
		Off Contract by Diversity Status	Total Spend Amount Total Off-contract Spend Amount Off-Contract Spend % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Commodity Count Category Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option)

Folder	Description	Analysis name **<folder name> by <dimension>**	Measures
		Off Contract by Business Unit	Total Spend Amount Total Off-contract Spend Amount Off-Contract Spend % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Commodity Count Category Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option)
		Off Contract by Cost Center	Total Spend Amount Total Off-contract Spend Amount Off-Contract Spend % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Commodity Count Category Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option)
		Off Contract by Organization Geography	Total Spend Amount Total Off-contract Spend Amount Off-Contract Spend % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Commodity Count Category Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option)

Folder	Description	Analysis name **<folder name> by <dimension>**	Measures
		Off Contract by Supplier Geography	Total Spend Amount Total Off-contract Spend Amount Off-Contract Spend % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Commodity Count Category Count Supplier Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option)
		Off Contract by Buyer	Total Spend Amount Total Off-contract Spend Amount Off-Contract Spend % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Commodity Count Category Count Supplier Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option)
4. Invoice Price Variance	Analyze difference between Invoice price and PO price by <dimension> Variance Amount and % of variance metrics included.		
		Invoice Price Variance by Commodity	Total Spend Amount Total Invoice Price Variance Amount Invoice Price Variance % PO Price Invoice Received Price Weighted Avg. Unit Price (item level only) Min. Unit Price (item level only) Max. Unit Price (item level only) Quantity (item level) UOM (item level) Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
		Invoice Price Variance by Category	Total Spend Amount Total Invoice Price Variance Amount Invoice Price Variance % PO Price Invoice Received Price Weighted Avg. Unit Price (item level only) Min. Unit Price (item level only) Max. Unit Price (item level only) Quantity (item level) UOM (item level) Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Invoice Price Variance by Supplier	Total Spend Amount Total Invoice Price Variance Amount Invoice Price Variance % PO Price Invoice Received Price Weighted Avg. Unit Price (item level only) Min. Unit Price (item level only) Max. Unit Price (item level only) Quantity (item level only) UOM (item level only) Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Invoice Price Variance by Diversity Status	Total Spend Amount Total Invoice Price Variance Amount Invoice Price Variance % PO Price Invoice Received Price Weighted Avg. Unit Price (item level only) Min. Unit Price (item level only) Max. Unit Price (item level only) Quantity (item level only) UOM (item level only) Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name **<folder name> by <dimension>**	Measures
		Invoice Price Variance by Business Unit	Total Spend Amount Total Invoice Price Variance Amount Invoice Price Variance % PO Price Invoice Received Price Weighted Avg. Unit Price (item level only) Min. Unit Price (item level only) Max. Unit Price (item level only) Quantity (item level only) UOM (item level only) Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
5. Purchase Price Variance	Analyze difference between Purchase Price and standard cost by <dimension>. Variance and % Variance are calculated.		
		Purchase Price Variance by Commodity	Total Spend Amount Total Purchase Price Variance Amount Purchase Price Variance % PO Price Standard Unit Cost (item level only) UOM (item level) Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total
		Purchase Price Variance by Category	Total Spend Amount Total Purchase Price Variance Amount Purchase Price Variance % PO Price Standard Unit Cost (item level only) Avg. Invoice Unit Price (item level only) Quantity (item level) Min Unit Price Max Unit Price UOM (item level) Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
		Purchase Price Variance by Supplier	Total Spend Amount Total Purchase Price Variance Amount Purchase Price Variance % PO Price Standard Unit Cost (item level only) Avg. Invoice Unit Price (item level only) Quantity (item level) Max Unit Price Min Unit Price UOM (item level) Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Purchase Price Variance by Diversity Status	Total Spend Amount Total Purchase Price Variance Amount Purchase Price Variance % PO Price Standard Unit Cost (item level only) Avg. Invoice Unit Price (item level only) Quantity (item level) Min Unit Price Max Unit Price UOM (item level) Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
		Purchase Price Variance by Business Unit	Total Spend Amount Total Purchase Price Variance Amount Purchase Price Variance % PO Price Standard Unit Cost (item level only) Avg. Invoice Unit Price (item level only) Quantity (item level) Min Unit Price Max Unit Price UOM (item level) Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Purchase Price Variance by Buyer	Total Spend Amount Total Purchase Price Variance Amount Purchase Price Variance % PO Price Standard Unit Cost (item level only) Avg. Invoice Unit Price (item level only) Quantity (item level) Min Unit Price Max Unit Price UOM (item level) Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name **<folder name> by <dimension>**	Measures
6. Item Price Variance	Analyze price variance of an item across all suppliers within a given period of time (default: last 12 months) by <dimension> Price Variance Amount and % of variance metrics included.		
		Item Price Variance by Commodity	Total Spend Amount Total Item Price Variance Amount Item Price Variance % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Min. Invoice Approved/Paid Unit Price (item level only) Max. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Category Count Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Item Price Variance by Category	Total Spend Amount Total Item Price Variance Amount Item Price Variance % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Min. Invoice Approved/Paid Unit Price (item level only) Max. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Commodity Count Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
		Item Price Variance by Supplier	Total Spend Amount Total Item Price Variance Amount Item Price Variance % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Min. Invoice Approved/Paid Unit Price (item level only) Max. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Category Count Commodity Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Item Price Variance by Diversity	Total Spend Amount Total Item Price Variance Amount Item Price Variance % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Min. Invoice Approved/Paid Unit Price (item level only) Max. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Category Count Commodity Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
7. Supplier Item Price Variance	Analyze price variance of an item across all suppliers within a given period of time (default: last 12 months) by `<dimension>`. Item Price Variance Amount and % of variance metrics included.		
		Individual Supplier Item Price Variance by Commodity	Total Spend Amount UOM (item level) Category Count Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Individual Supplier Item Price Variance by Category	Total Spend Amount Total Item Price Variance Amount Item Price Variance % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Min. Invoice Approved/Paid Unit Price (item level only) Max. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Commodity Count Supplier Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name **<folder name> by <dimension>**	Measures
		Individual Supplier Item Price Variance by Supplier	Total Spend Amount Total Item Price Variance Amount Item Price Variance % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Min. Invoice Approved/Paid Unit Price (item level only) Max. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Category Count Commodity Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Individual Supplier Item Price Variance by Diversity	Total Spend Amount Total Item Price Variance Amount Item Price Variance % Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Min. Invoice Approved/Paid Unit Price (item level only) Max. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Category Count Commodity Count Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
8. Supplier Price Optimization	Analyze instances where the same item is being purchased from multiple suppliers at different prices within a given time period (default: last 12 months), and calculate the potential cost savings if the item were purchased at the lowest price. Supplier Price Optimization Amount and % metrics included.		
		Supplier Price Optimization by Commodity	Total Spend Amount Total Supplier Price Optimization Amount Supplier Price Optimization % Min. Invoice Approved/Paid Unit Price (item level only) Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Max. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		Supplier Price Optimization by Category	Total Spend Amount Total Supplier Price Optimization Amount Supplier Price Optimization % Min. Invoice Approved/Paid Unit Price (item level only) Weighted Avg. Invoice Approved/Paid Unit Price (item level only) Max. Invoice Approved/Paid Unit Price (item level only) Quantity (item level) UOM (item level) Buyer Count Site Count Invoice Count PO Count Secondary Currency (option) Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name **<folder name> by <dimension>**	Measures
9. PO price Optimization	Analyze instances where multiple sites are buying the same item from the same supplier at different prices within a given time period (default: last 12 months) by `<dimension>` and the potential cost savings that could be achieved if the PO's were aligned at the lowest price. PO Price Optimization Amount and % metrics included.		
		PO Price Optimization by Commodity	Total Spend Amount Total Purchase Order Price Optimization Cost Purchase Order Price Optimization % Minimum PO Unit Price (item level only) PO Unit Price (item level only) Quantity (item level) UOM (item level) Buyer Count Site Count PO Count Contract Count Secondary Currency (option) Running total (shown as a display option, trend reports only)
		PO Price Optimization by Category	Total Spend Amount Total Contract Price Optimization Cost Contract Price Optimization % Minimum PO Unit Price (item level only) PO Unit Price (item level only) Quantity (item level) UOM (item level) Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option) Running total (shown as a display option, trend reports only) % of Total Spend

Folder	Description	Analysis name <folder name> by <dimension>	Measures
		PO Price Optimization by Business Unit	Total Spend Amount Total Contract Price Optimization Cost Contract Price Optimization % Minimum PO Unit Price (item level only) PO Unit Price (item level only) Quantity (item level) UOM (item level) Buyer Count Site Count Invoice Count PO Count Contract Count Secondary Currency (option) Running total (shown as a display option, trend reports only) % of Total Spend
10. Contract			
	Analyze Spend by the time since the Contract went into effect to identify sourcing opportunities. Age of contracts in the range of 0-3m, 4-6m, 7-12m, 1-2 yrs and > 2yrs	Contract by Contract Age	Total Spend Time available before Expiration Quantity (item level) UOM (item level) Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Running total (shown as a display option, trend reports only)
	Analyze Spend by he contracts that are about to expire within 0-3m, 4-6m, 7-12m, 1-2 yrs and > 2yrs	Contract by Expiring Contracts	Total Spend Time available before Expiration Quantity (item level) UOM (item level) Category Count Item Count Supplier Count Buyer Count Site Count Invoice Count PO Count Contract Count Running total (shown as a display option, trend reports only)

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
11. Projects	A list of planned Spend for Projects in descending order with `<dimension>`.		
		Projects by Commodity	Planned Spend Amount Actual Spend Amount Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Item Count
		Projects by Category	Planned Spend Amount Actual Spend Amount Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Item Count
		Projects by Business Unit	Planned Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Item Count
		Projects by Cost Center	Planned Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Item Count
		Projects by Buyer	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Item Count

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
		Projects by Project Status	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Item Count
		Projects by Project Risk	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Item Count
		Projects by Project Priority	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Item Count
		Projects by Category Manager	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Item Count
		Projects by Start Date	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Item Count

Folder	Description	Analysis name <folder name> by <dimension>	Measures
		Projects by Completion Date	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Item Count
	A list of planned Spend for Projects in descending order in a specific time period (default 12 months).	Projects by Time	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Item Count
12. Programs	A list of planned Spend for Programs in descending order with <dimension>.		
		Programs by Commodity	Planned Spend Amount Addressed Spend Amount Actual Spend Amount Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Site Count
		Programs by Category	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Site Count Item Count

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
		Programs by Business Unit	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Site Count Item Count
		Programs by Cost Center	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Site Count Item Count
		Programs by Buyer	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Site Count Item Count
		Programs by Time	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Site Count Item Count
		Programs by Status	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Site Count Item Count

Folder	Description	Analysis name `<folder name>` by `<dimension>`	Measures
		Programs by Completion Date	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Site Count Item Count
		Programs by Start Date	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Site Count Item Count
		Programs by Value	
		Business Unit Report	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Site Count Item Count
		Programs by ROI	Planned Spend Amount Addressed Spend Amount Actual Spend Actual as % of Planned Planned Objective Amount Negotiated Objective Amount Actual Objective Amount Program Count Initiative Count Site Count Item Count

Appendix E: xApp Spend Analytics Menu Tree

This appendix graphically depicts every path available in the xSA graphical user interface.

Root Menu Outline

- New
  - Report
    - Blank New Report
    - Based on Existing Report
  - Dashboard
  - Briefing Book
- Actions
  - Open
  - Email
  - Save
  - Save as
  - Rename
  - Delete
  - Share / Unshare
  - Close
- Favorites
  - Add to Favorites
  - Organize Favorites
  - Edit Dimension Favorites
  - Reports
    - <user-defined list>
  - Dashboards
    - <user-defined list>
  - Briefing Books
    - <user-defined list>
- Quick Links
  - <user-defined list>
- Settings
  - User Preferences
  - Organize Content
  - Refresh Content Navigator View
  - Related Applications Configuration
  - Quick Links Configuration
- Data Management
  - Data Collection
    - Upload Administration

- Upload Analysis
- Preparation
  - Upload Administration
    - New Template
      - Set Parameters
      - Map Fields
      - Save
  - Global Settings
    - General
    - Systems
    - Refresh Period
    - Field Labels
    - Exchange Rates
- Data Transfer
  - Master Data
    - Export
    - Import
  - Transaction Data
    - Export
    - Import

Help

- User Guide (Web link)
- About Spend Analytics

Appendix F: Troubleshooting

If you experience a problem with xSA, there are two choices to make. You can either refresh your browser, resetting the parameters to the start setup, or you can record the error messages and send them to an SAP technician associated with your department.

To reset the browser

1. Use one of the Windows Internet Explorer refresh options.
2. If your error is not resolved, log out and sign back in.

To record error messages

1. If your error is still not resolved by reset or logging off from xSA, click on log message icon (, , or) and manually record the errors for transmission to your SAP technician.
2. E-mail or FAX the problem you are experiencing along with the error message you scribed to your SAP technician.

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