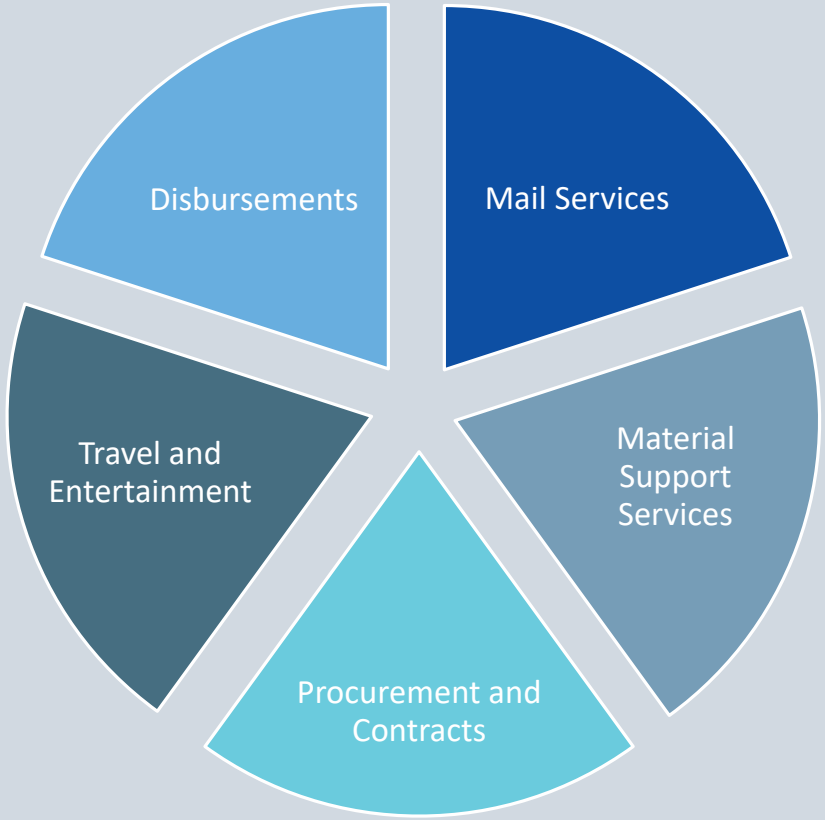
UC San Diego: Executive Dashboard

IPPS ANALYTICS

Integrated Procure-to-Pay Solutions

Our mission:

Integrated procure-to-pay solutions and customer care in support of world-class education and research



Integrated Procure-to-Pay Solutions

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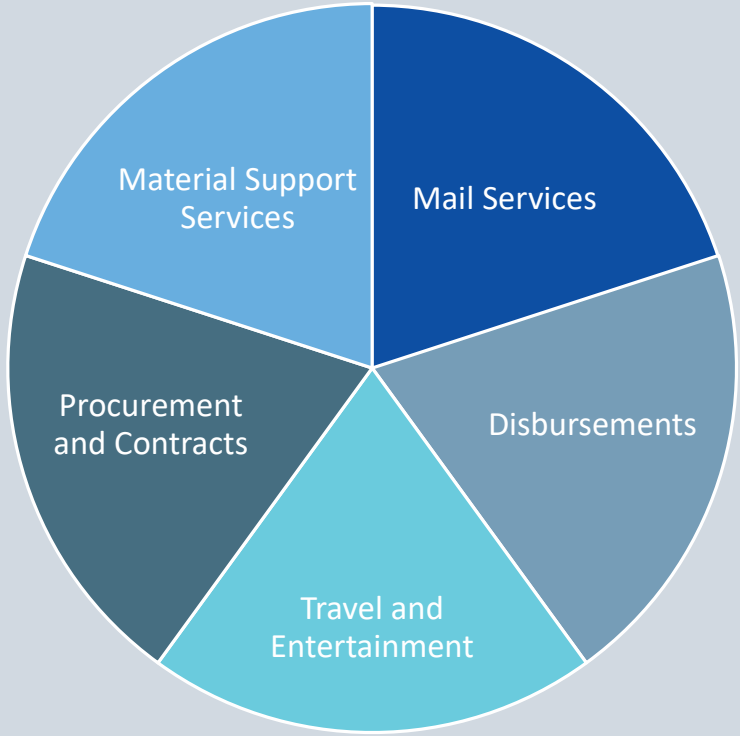
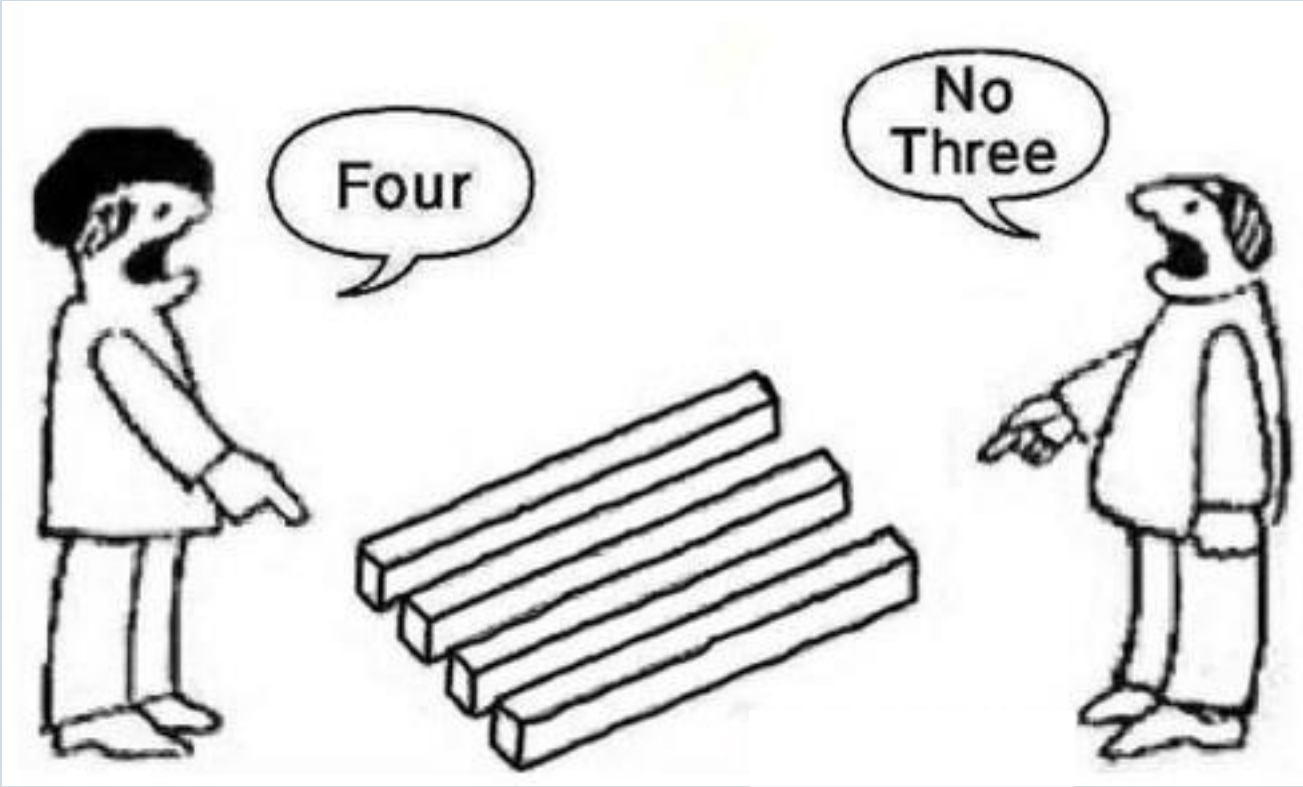


What Is The Truth?



IPPS Executive Dashboard

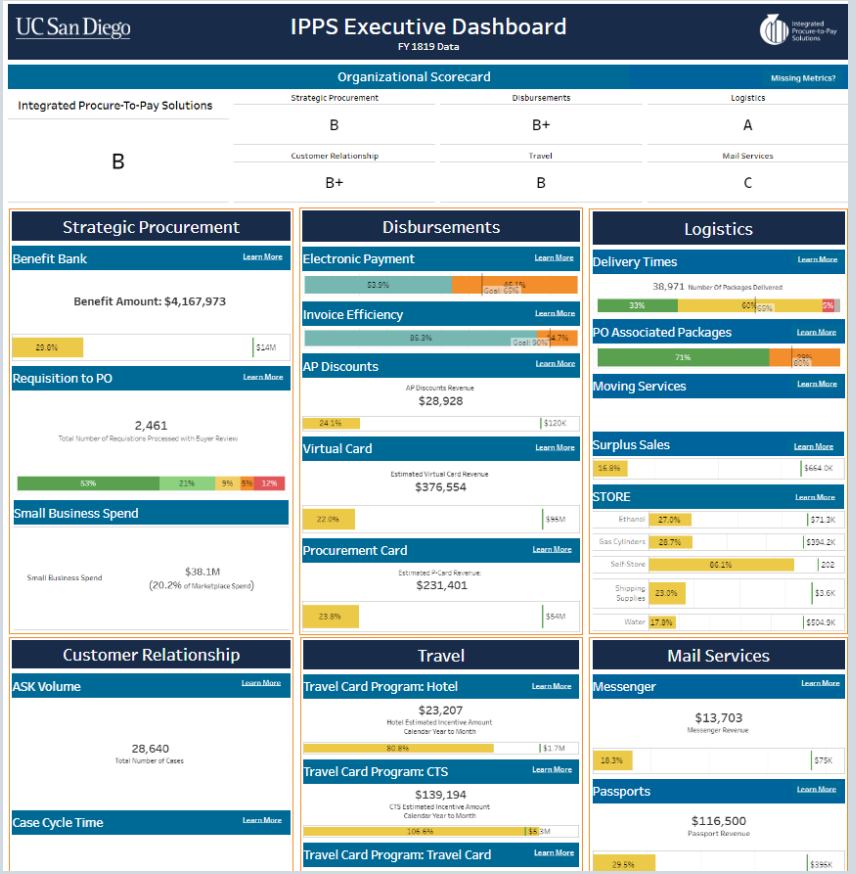
Houses strategic metrics in ONE dashboard

Owned by IPPS Core Leadership Team

Maintained by the IPPS Analytics Team

Dashboard Features:

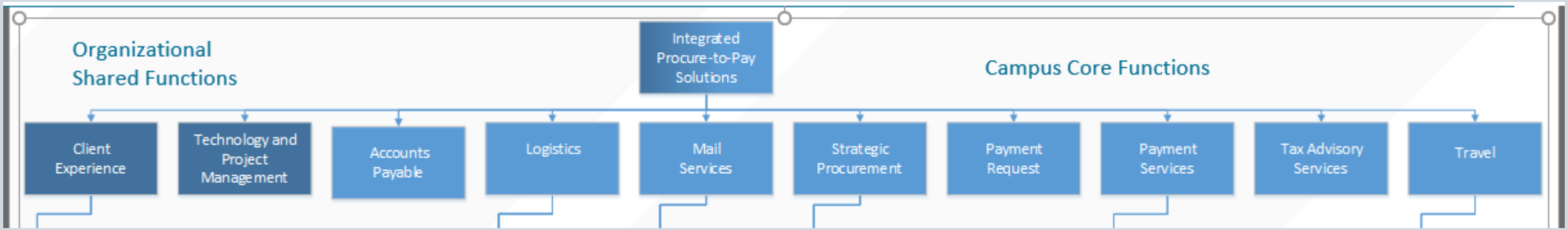
- 30+ Metrics
- 14 Unique Data Sources
- Visual Grading System
- Underlying Supporting Dashboards



Adventure Time

1. Defining Metrics Process
2. Leveraging Business Intelligence Features
3. Tiers & Building Data Sources
4. Grading System
5. The Lessons We Learned

IPPS Structure



Metric Collection

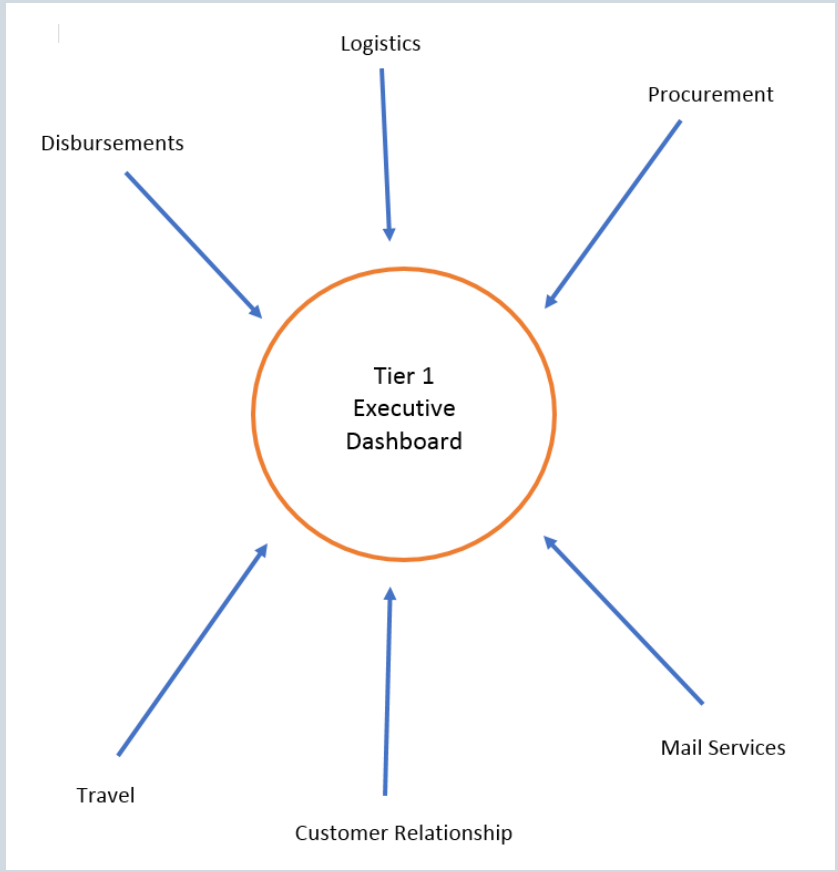
Leadership Buy-in is Essential

- Core knowledge and decision maker

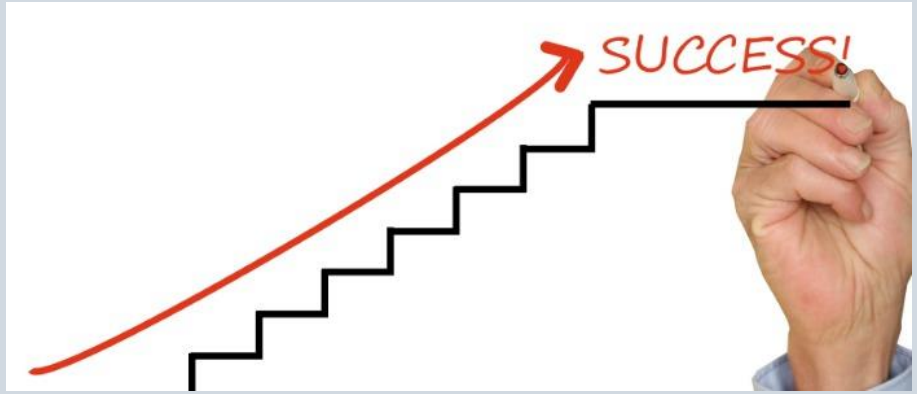
What Metrics to Develop?

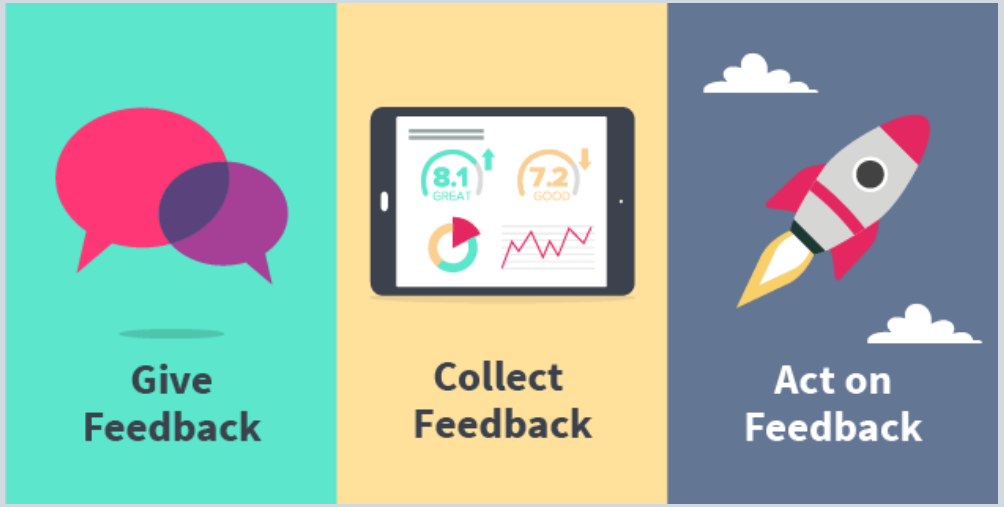
- Wish list

Juggling The List



Metric Collection





How Feasible are the Metrics?

- Importance to the organization?
- Impact to Analytics Team workload?
  - Complexity & Data Access

Continuous Engagement

- Meet with division leaders 2-3 times a week

Leveraging Analytics Tools

Business Intelligence tool:

Tableau features embedded URL's

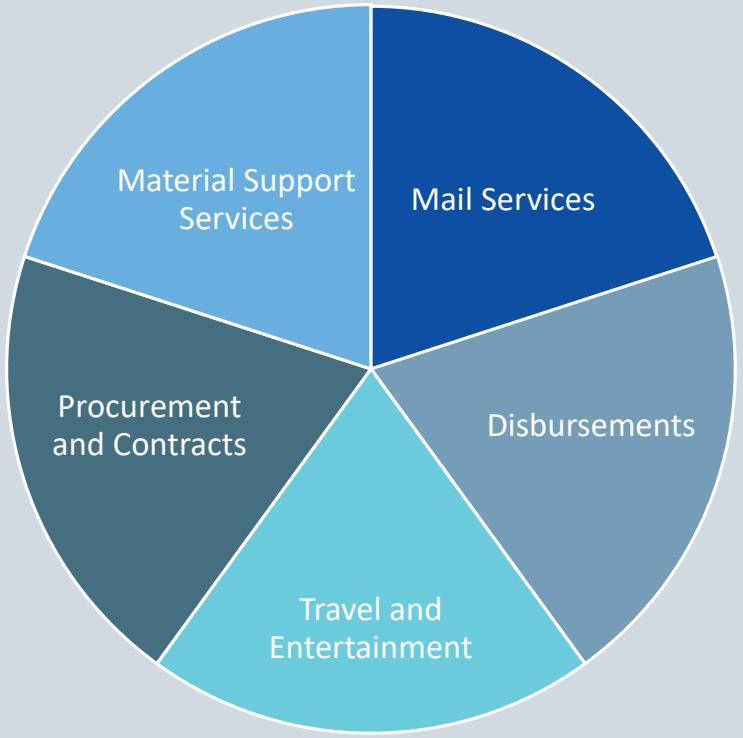
- This is the foundation of the dashboard tier system

Avoiding The Pitfall

Pitfall: High Data Volume

High Volume of data = Slow Performance

How Much Data?!?

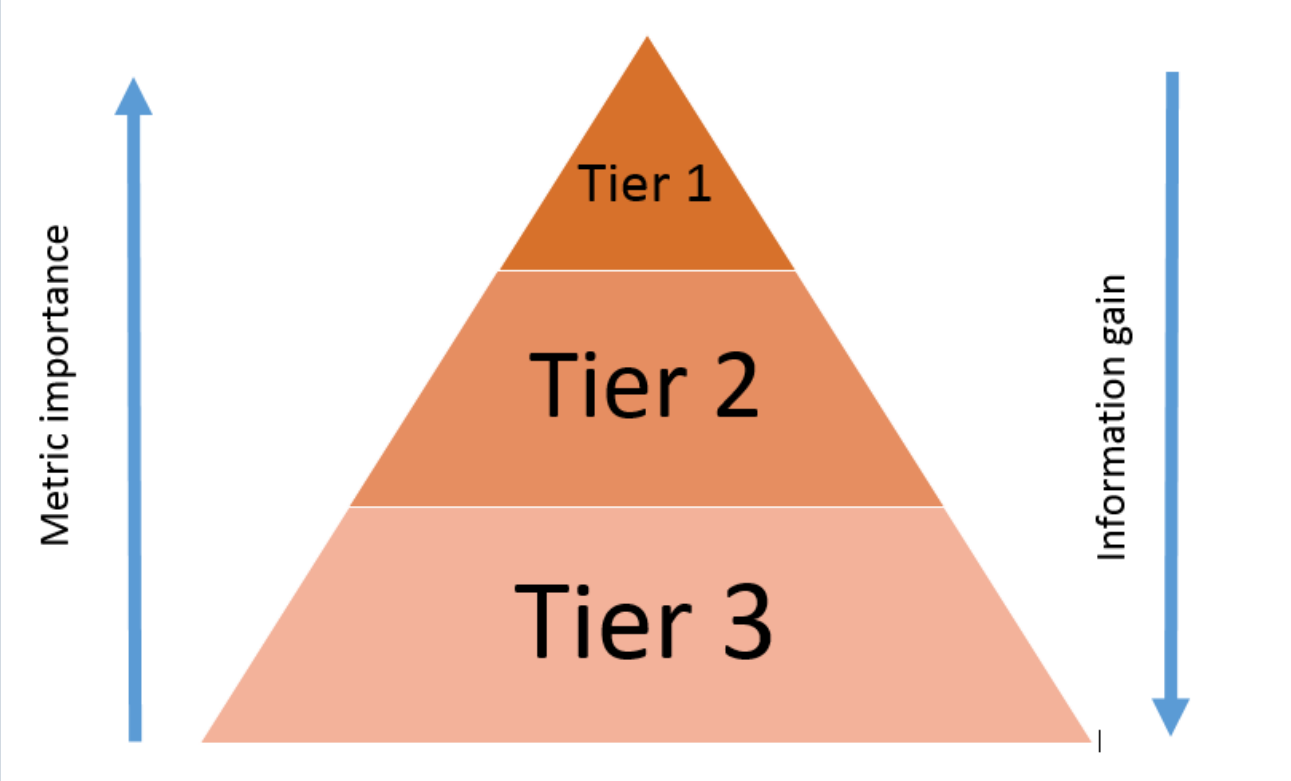


*No computers were harmed in the making of this dashboard

Avoiding The Pitfall

Solution:
Tier Dependent Data Sources

Data Tiers



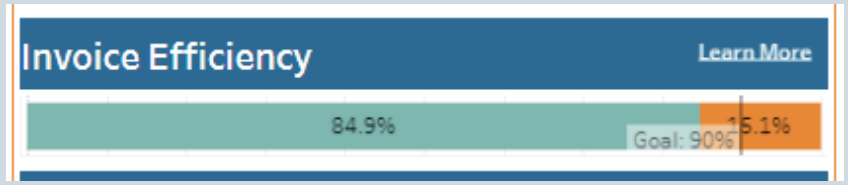
Tier 1 = Executive Dashboard (1)

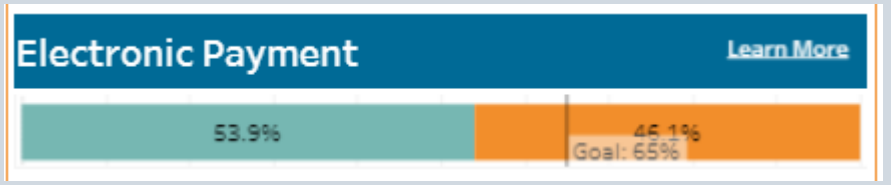
Tier 2 = Director Level Dashboard (36)

Tier 3 = Project Based Dashboard

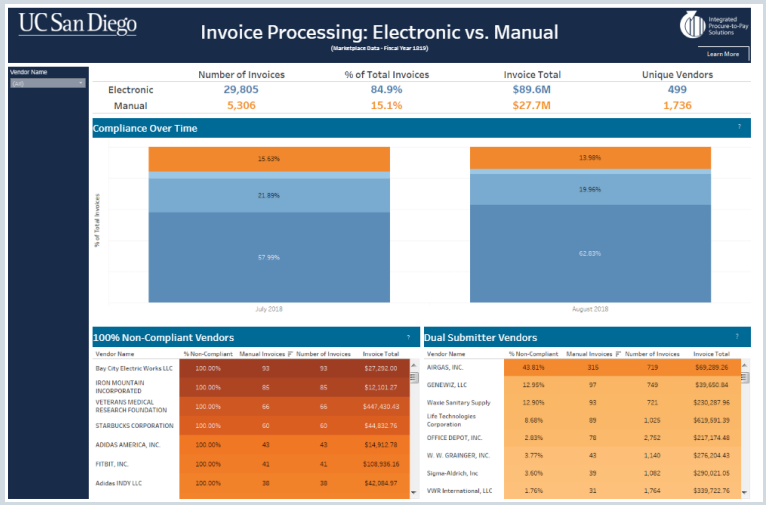
Tier Examples

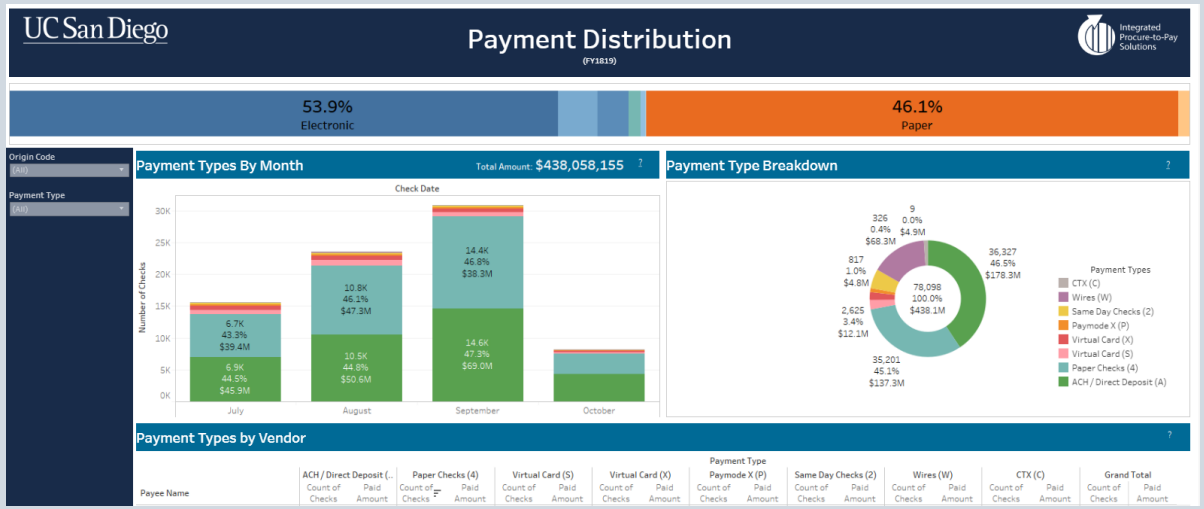
Tier 1



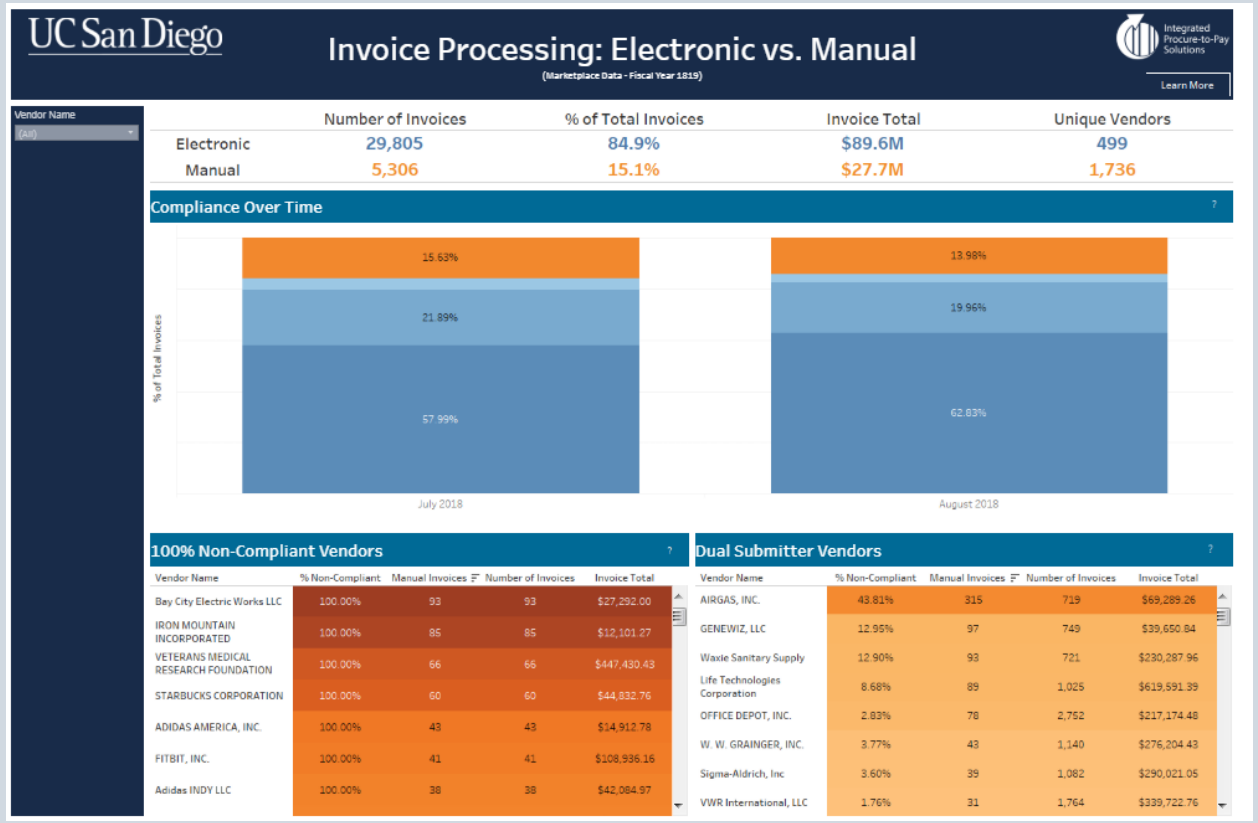


Tier 2





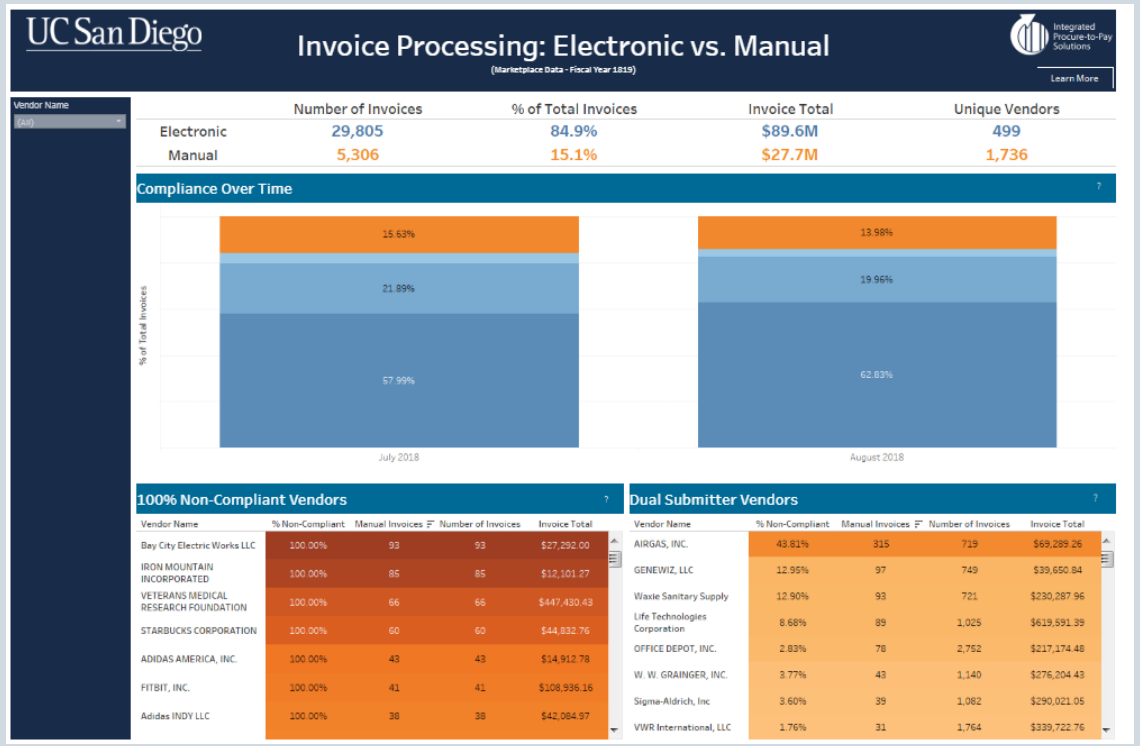
Data Structures: Tier 2



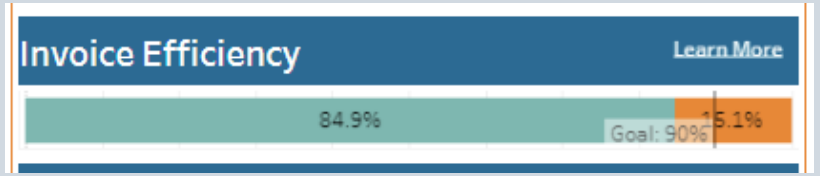
Tier 2

- Supporting details for Tier 1 metrics
- Explain WHAT is happening & WHY it is happening
- Information based on transactional level
- There is a lot of data stored in this tier

Data Structures: Tier 1



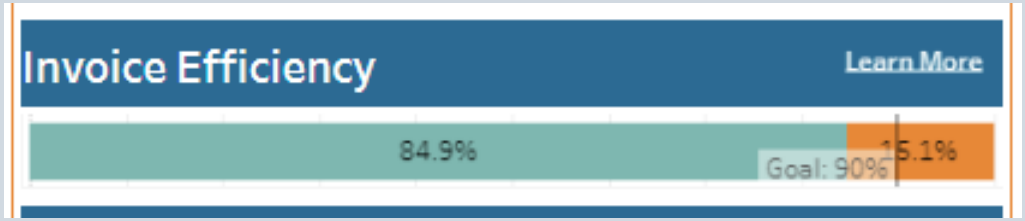
Tier 1 Metric:



Data Structures: Tier 1

Data Structures: Tier 1

Tier 1
- High level single metric visual



Key: Summarize data to build one visual

View Data: Sheet 109

64,437 rows | Show aliases | Show all fields

Electronic v Manual	Ih Invoice Create Date	Ih Invoice Source	Invoice Date	Invoice Line Id	Invoice Number
Electronic	7/1/2018 12:00:00 AM	cXML	7/1/2018 12:...	198364329	82004028
Electronic	7/1/2018 12:00:00 AM	cXML	7/1/2018 12:...	198364393	82004029
Electronic	7/1/2018 12:00:00 AM	cXML	7/1/2018 12:...	198364391	82004029
Electronic	7/1/2018 12:00:00 AM	cXML	7/1/2018 12:...	198364394	82004029
Electronic	7/1/2018 12:00:00 AM	cXML	7/1/2018 12:...	198364392	82004029
Electronic	7/1/2018 12:00:00 AM	cXML	7/1/2018 12:...	198364390	82004029

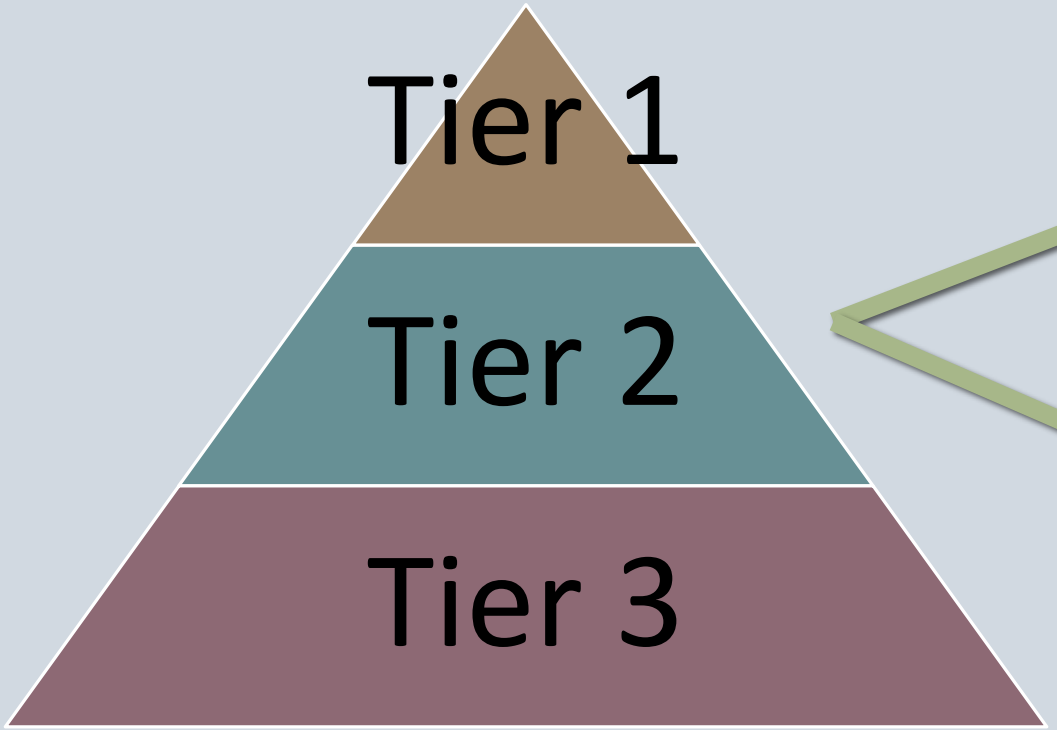
Summarize Data

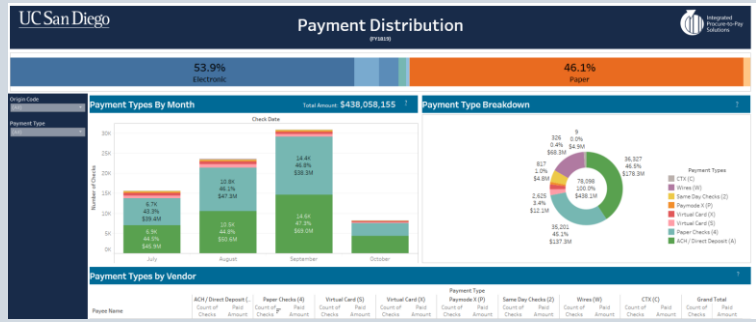
View Data: qry_Exec_InvoiceSourceTypeAmountCountPart2 (Executive_Disb_DB)

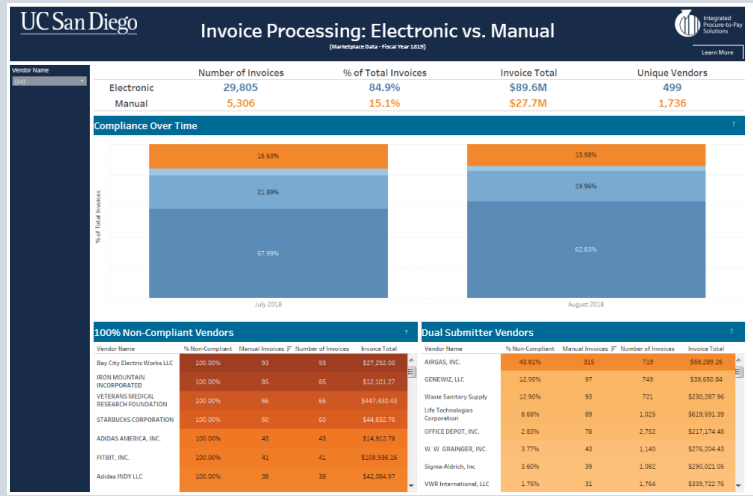
4 rows | Show aliases | Copy | Export All

Electronic v Manual	Ih Invoice Source	CountOfINVOICE NUMBER	Electronic Goal	Number of Records
Electronic	Electronic	20,896	0.900000	1
Electronic	Invoice Imp	7,472	0.900000	1
Manual	Manual	5,306	0.900000	1
Electronic	Supplier Po	1,437	0.900000	1

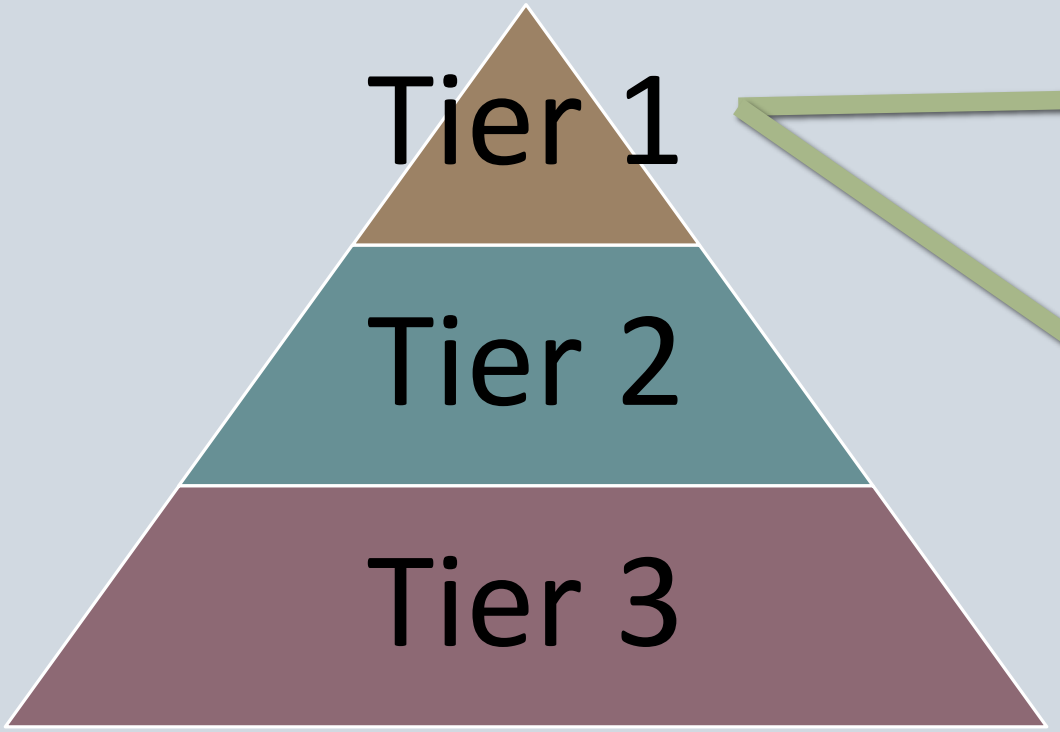
Recap Slide

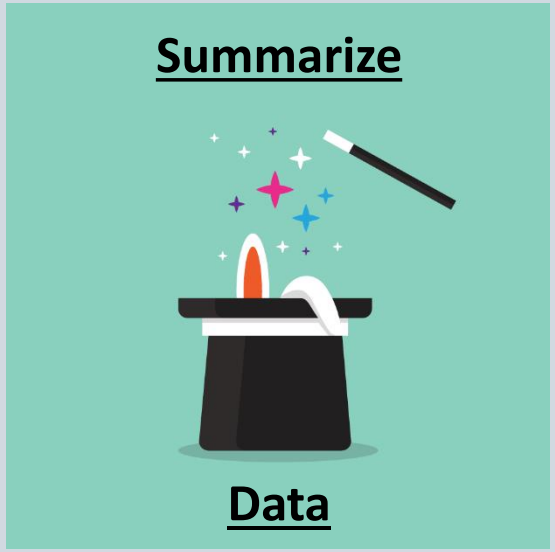

Tier 1
Tier 2
Tier 3

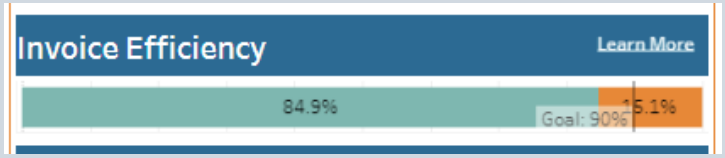

UC San Diego
Payment Distribution
53.9%
Electronic
46.1%
Paper
Payment Types By Month
Payment Type Breakdown
Payment Types by Vendor


UC San Diego
Invoice Processing: Electronic vs. Manual
Number of Invoices
% of Total Invoices
Invoice Total
Unique Vendors
Electronic
29,805
84.9%
$89.6M
499
Manual
5,306
15.1%
$27.7M
1,736
Compliance Over Time
100% Non-Compliant Vendors
Dual Submitter Vendors

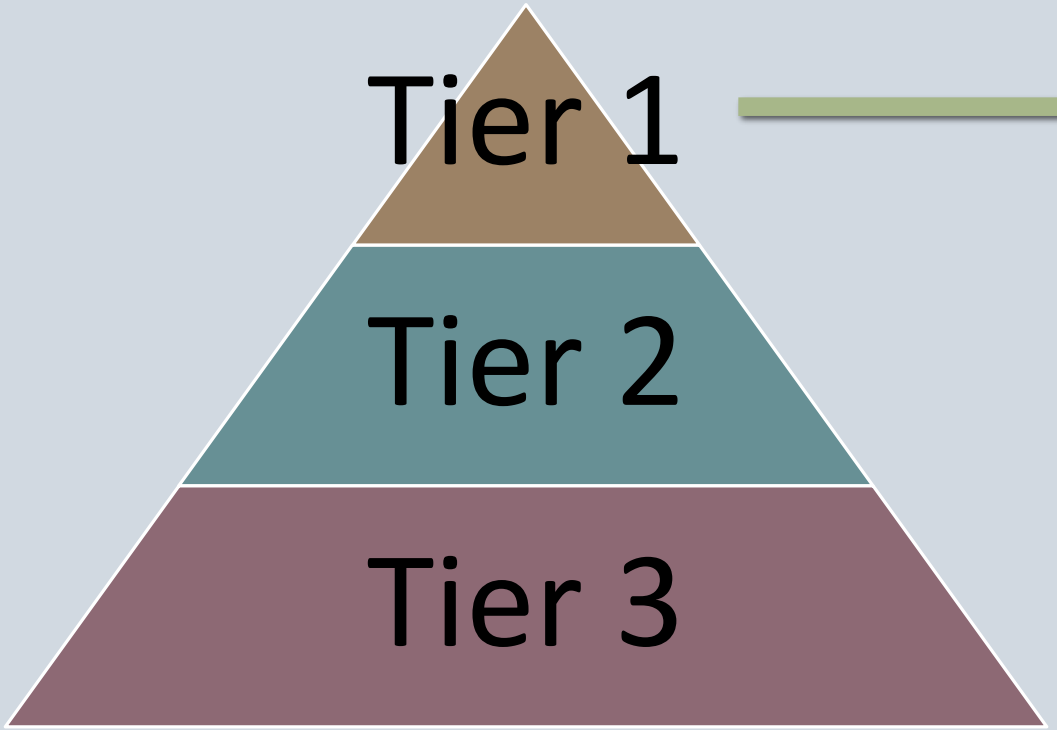
Recap Slide

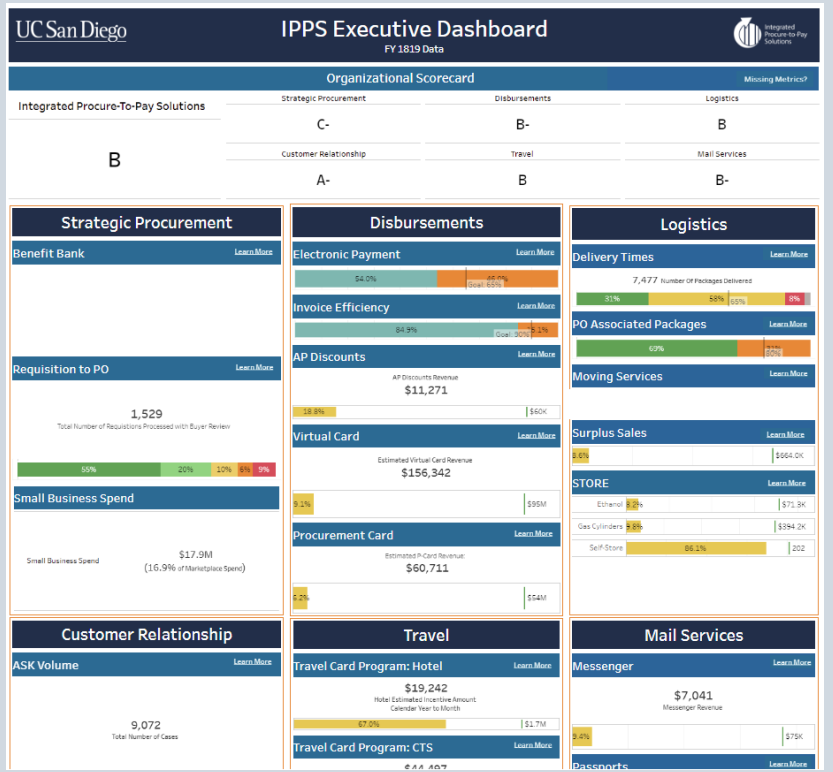

Tier 1
Tier 2
Tier 3


Summarize
Data

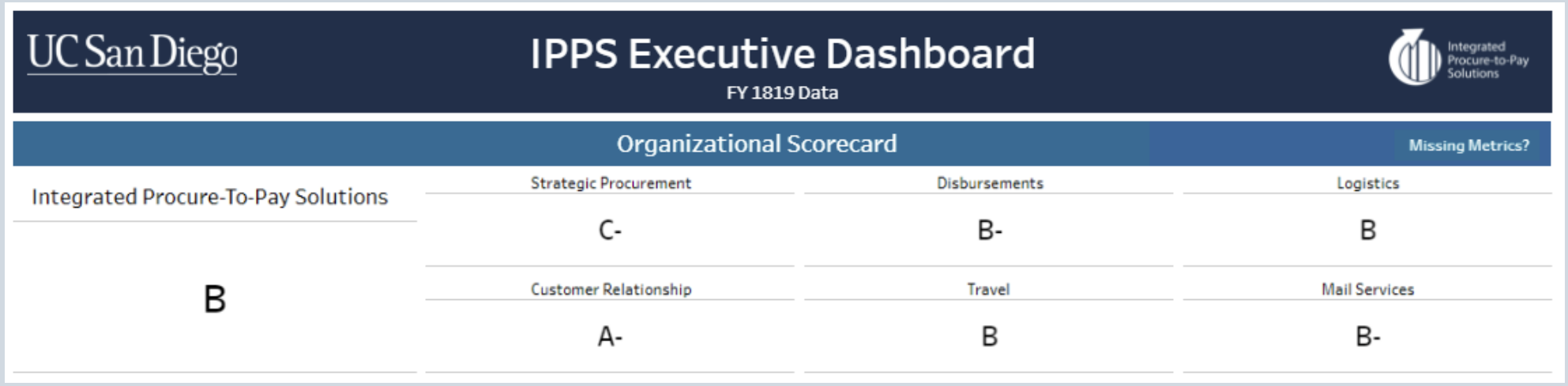

Invoice Efficiency
Learn More
84.9%
Goal: 90%
15.1%

Recap Slide


Tier 1
Tier 2
Tier 3


UC San Diego
IPPS Executive Dashboard
FY 1819 Data
Organizational Scorecard
Missing Metrics?
Integrated Procure-To-Pay Solutions
B
Strategic Procurement
C-
Disbursements
B-
Logistics
B
Customer Relationship
A-
Travel
B
Mail Services
B-
Strategic Procurement
Benefit Bank
Learn More
Requisition to PO
Learn More
1,529
Total Number of Requisitions Processed with Buyer Review
55%
20%
10%
6%
9%
Small Business Spend
Small Business Spend
$17.9M
(16.9% of Marketplace Spend)
Disbursements
Electronic Payment
Learn More
84.0%
Goal: 65%
Invoice Efficiency
Learn More
84.9%
Goal: 90%
AP Discounts
Learn More
AP Discounts Revenue
$11,271
18.8%
$60K
Virtual Card
Learn More
Estimated Virtual Card Revenue
$156,342
9.1%
$95M
Procurement Card
Learn More
Estimated P-Card Revenue
$60,711
$64M
Logistics
Delivery Times
Learn More
7,477 Number Of Packages Delivered
31%
63%
6%
PO Associated Packages
Learn More
69%
Moving Services
Learn More
Surplus Sales
Learn More
$664.0K
STORE
Learn More
Ethanol
$71.8K
Gas Cylinders
$384.2K
Self-Store
86.1%
202
Customer Relationship
ASK Volume
Learn More
9,072
Total Number of Cases
Travel
Travel Card Program: Hotel
Learn More
$19,242
Hotel Estimated Incentive Amount Calender Year to Month
67.0%
$1.7M
Travel Card Program: CTS
Learn More
Mail Services
Messenger
Learn More
$7,041
Messenger Revenue
$75K
Passports
Learn More

Grade Creation



UC San Diego

IPPS Executive Dashboard

FY 1819 Data

Integrated Procure-to-Pay Solutions

Organizational Scorecard

Missing Metrics?

Integrated Procure-To-Pay Solutions	Strategic Procurement	Disbursements	Logistics
	C-	B-	B
B	Customer Relationship	Travel	Mail Services
	A-	B	B-

Grade Creation

Grade Creation

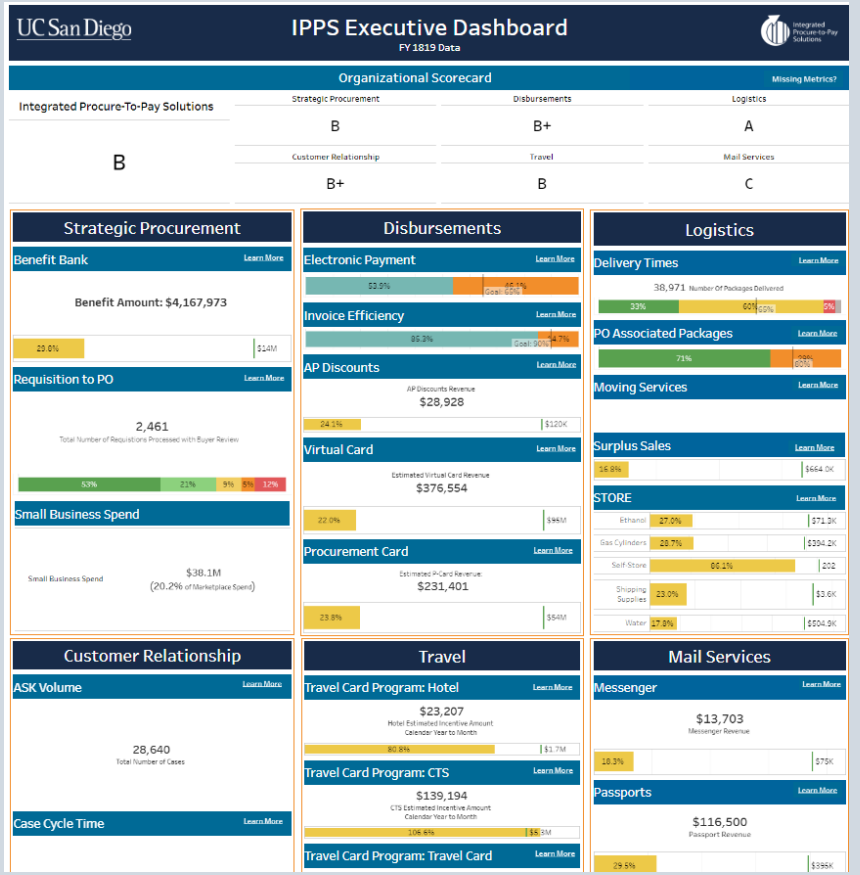
Monthly Milestone

- Financial goals
- Sales goals

Transactional Grading Buckets

- Transactional Metrics

Executive Dashboard Time!



Lessons Learned

Defining Metric Goals & Benchmarks is Critical

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Subject Matter Experts are Key

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External Data Sources

Lessons Learned

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Subject Matter Experts are Key

External Data Sources

Can’t Measure What You Don’t Track

Lessons Learned

Defining Metric Goals & Benchmarks is Critical

Subject Matter Experts are Key

External Data Sources

Can’t Measure What You Don’t Track

Document, Document, Document

Lessons Learned

Defining Metric Goals & Benchmarks is Critical

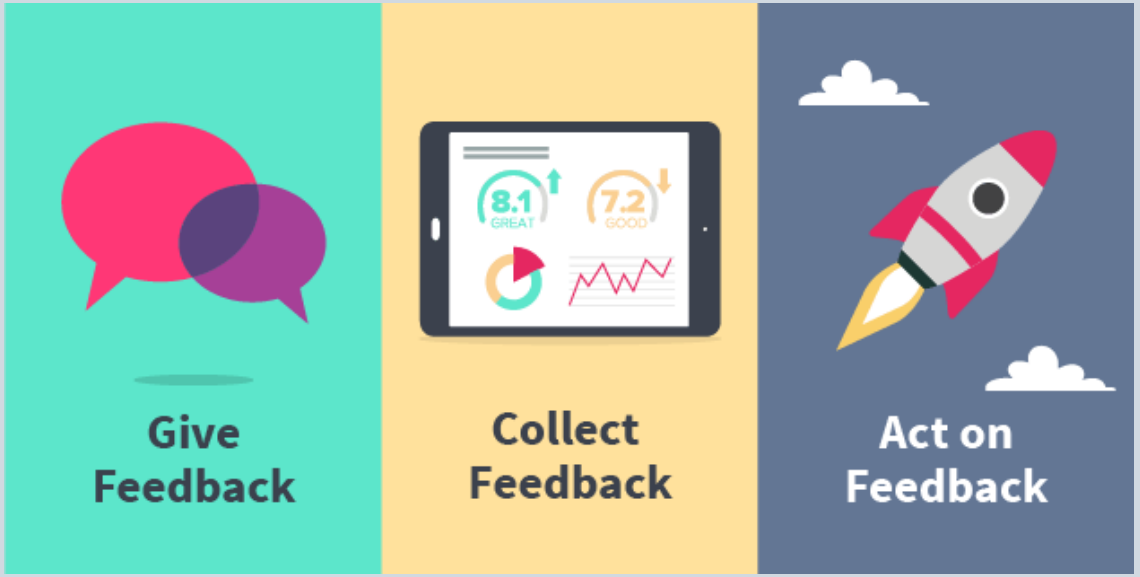
Subject Matter Experts are Key

External Data Sources

Can’t Measure What You Don’t Track

Document, Document, Document

Continuous Organizational Engagement



Mission Accomplished

Presenter:
Irvin Palacios

E-mail:
ipalacio@ucsd.edu