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SAP Spend Analysis and Insights User Guide



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SAP Spend Analysis and Insights User Guide

This guide is for users of SAP Spend Analysis and Insights, including administrators and data managers who configure and manage the data enrichment process, enrichment managers and category reviewers who review and improve enriched spend data, and business analysts who monitor and analyze organizational spend through dashboards.

SAP Spend Analysis and Insights (SAI) gives procurement teams a single, AI-powered view of their spend. It ingests invoice line items from S/4HANA and other ERP sources, enriches them with UNSPSC taxonomy classifications and verified D&B supplier data, and surfaces the results through role-based dashboards and a rich analytics layer embedded in SAP Analytics Cloud (SAC).

SAP Spend Analysis and Insights Overview

SAP Spend Analysis and Insights is a spend analytics application that consolidates transaction data from multiple source systems, enriches it using machine learning, and surfaces the results through role-based dashboards.

It enables you to gain total spend visibility, identify cost reduction opportunities, reduce supplier risk, and monitor procurement compliance.

SAP Spend Analysis and Insights uses two core enrichment services:

Spend categorization	Invoice line items are automatically classified against the UNSPSC taxonomy (version 25, four levels, 150,000+ codes) or a customer-specific custom taxonomy. An SAP internal audit team reviews all machine learning predictions to ensure accuracy, and enrichment managers can provide feedback to further improve classification quality.
Supplier enrichment	Source system suppliers are deduplicated and matched against the Dun & Bradstreet database to produce a master supplier list with standardized names, addresses, industry codes, and corporate hierarchy information, including Global Ultimate parent relationships.

Enrichment is a continuous process. After the initial enrichment run is complete and a customer-specific machine learning model has been generated, data is refreshed on a daily schedule as new transactions flow in. Confirmed enriched values are published to the spend dashboards for analysis.

User Roles

When you subscribe to SAP Spend Analysis and Insights, the system automatically creates the roles and role collections mentioned below. Each role is based on a role template that enables specific rights.

User Role	User Groups Assigned in SAP Cloud Identity Services – Identity Authentication (IAS)	Description	Role Permissions
Administrator	- SAIAdministrator - PluginManager - Customer Administrator - AribaLaunchpadUser - AdminCenter_Access	Has full access to all features and Admin Center. Responsible for tenant configuration, user management, data ingestion, and data quality oversight. - All L2 navigation menus - Admin Center (Configuration, Data Management, Data Quality Report) - Trigger model retrains and data re-ingestion - AMS user and access policy management	- Spend Dashboards - Taxonomy Load - Category Feedback - Supplier Feedback - Admin Center - Data Management
Business Analyst	- SAIBusinessAnalyst - PluginManager - AribaLaunchpadUser	Has access to spend dashboards and data analysis to bring spend under management. - Spend Taxonomy (read-only) - All Spend Dashboards - SAP Ariba Launchpad homepage Insights panel	- Spend Dashboards - Taxonomy Load (read-only)
Category Reviewer	- SAICategoryReviewer - PluginManager - AribaLaunchpadUser	Reviews and corrects ML-assigned spend categories. Can submit feedback to improve the ML model. - Category Feedback screens (hierarchy, search, mass-label) - Categorized Spend view - Submit feedback for ML training Confirms or rejects D&B supplier match candidates. Can search the D&B database for alternate matches. - Enriched Supplier → Supplier Feedback - Confirm/reject D&B candidates - D&B search	- Taxonomy Load (read-only) - Category Feedback - Supplier Feedback

User Groups Assigned in SAP Cloud Identity Services – Identity Authentication (IAS)

User Role		Description	Role Permissions
Enrichment Manager	- SAIEnrichmentManager - PluginManager - AribaLaunchpadUser	Reviews and corrects ML-assigned spend categories. Can submit feedback to improve the ML model. - Category Feedback screens (hierarchy, search, mass-label) - Categorized Spend view - Submit feedback for ML training	- Taxonomy Load (upload and edit) - Category Feedback
Data Manager	- SAIDataManager - PluginManager - Customer Administrator - AribaLaunchpadUser - AdminCenter_Access	Configures source systems for data load and views data quality.	- Spend Dashboards (Data Validation) - Admin Center (Data Management)

Spend Taxonomies

Data managers use Spend Taxonomies to define and manage an organization's custom procurement category taxonomy.

UNSPSC Taxonomy

The default taxonomy used by SAP Spend Analysis and Insights is the United Nations Standard Products and Services Code (UNSPSC) version 25, which is a standardized four-level hierarchy containing more than 150K codes.

To see the detailed hierarchy of the UNSPSC categories, on the SAP Ariba launchpad, choose ► **Spend Insights** ► **Spend Taxonomies** ►, and choose **UNSPSC**.

To change the display name for a level, choose **Edit Display Names** and edit the display name.

Custom Taxonomies

SAP Spend Analysis and Insights supports custom spend taxonomies, in addition to the UNSPSC system.

If you have custom taxonomies, you can select which one SAP Spend Analysis and Insights uses in dashboards by setting the **Dashboard Availability** column to **Available** or **Not Available**. By default, UNSPSC hierarchy is set to **Available**, but you can change it to **Not Available** if there are custom taxonomies listed.

For more information about custom taxonomies, see [Custom Spend Taxonomies \[page 9\]](#).

UNSPSC Extensions

During the data enrichment process, the SAP Internal Audit Team might extend sections of the UNSPSC for your organization to accurately model your purchasing. In this case, they add an additional level (Level 5) to portions of the standard UNSPSC system.

If your spend history contains many purchases categorized with the same UNSPSC Level 4 code, the SAP Internal Audit Team might determine that it needs to break them down into multiple, different Level 5 codes. These additional codes allow dashboards to display information that is relevant to your organization's spend, instead of grouping purchases at a higher level, which isn't useful for detailed analysis.

The SAP Internal Audit Team can add extensions to any UNSPSC Level.

If there are extended UNSPSC codes, view them by choosing the **Extended UNSPSC** tab.

Custom Spend Taxonomies

Administrators or enrichment managers can upload custom category taxonomies to classify products and services for their organization. To manage taxonomies, on the SAP Ariba launchpad, choose ► **Spend Insights** ► **Spend Taxonomies** ►.

Custom Taxonomy Classification in SAP Spend Analysis and Insights

SAP Spend Analysis and Insights supports spend categorization using custom taxonomies that map to the UNSPSC system.

Custom Taxonomy Structure

A custom taxonomy is a structured list of codes that a purchasing organization uses to categorize spend. SAP Spend Analysis and Insights uses machine learning to classify each invoice by assigning a corresponding custom code to each invoice line item.

Hierarchy Structure

Custom taxonomies follow a parent-child hierarchy with the following rules:

- Each taxonomy code must have a parent, except for the top-most level.
- Each taxonomy code must have a child, except for the lowest level (leaf node).
- A node can have only one parent (that is, a single code cannot belong to multiple categories). This single-parent requirement ensures a unique roll-up in the hierarchy and prevents duplicate spend accounting.
- A parent can have multiple child nodes.
- Each branch of the hierarchy can have any number of levels, including:
 - Top level (Level 1)
 - Intermediate levels
 - Leaf nodes (final level)

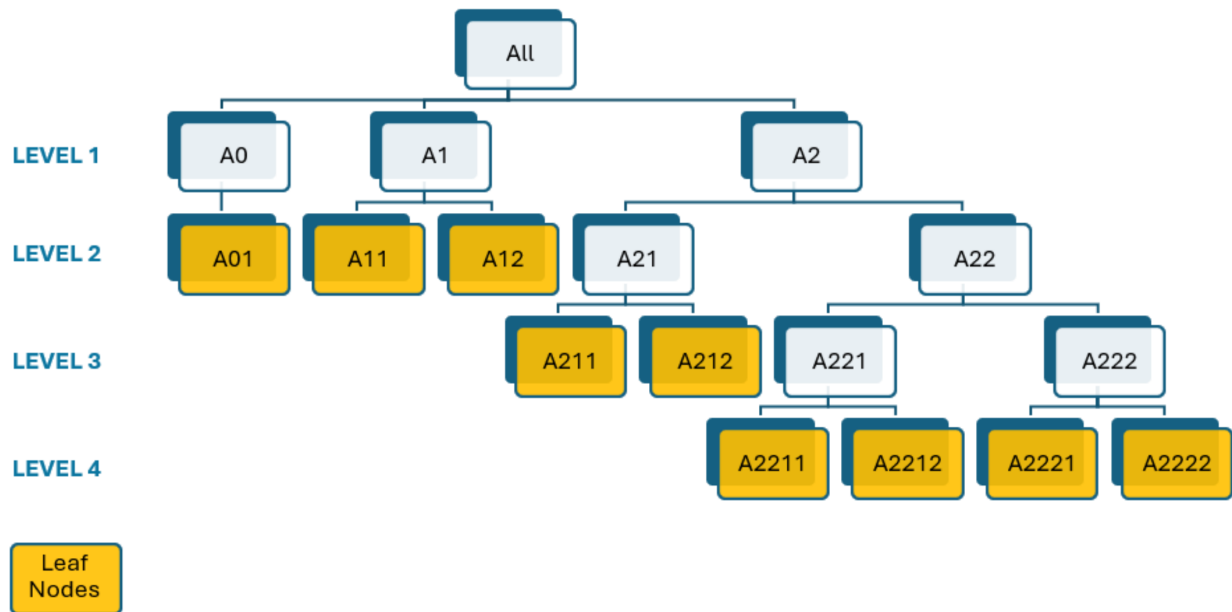
Taxonomy Code Definition

Each taxonomy code is defined by the following fields:

- Unique Code ID – A distinct identifier for each taxonomy code.
- Description / Display Name – A unique name that describes the code.
- Parent Code – Identifies the parent code (except for the top-most level, where this field can be left blank).
- Hierarchy Level – Specifies the level in the hierarchy (for example, Level 1 for the top level, Level 2 for its child, and so on).
- Keywords (Optional) – A list of comma-separated keywords to help the machine learning model better understand the category.

Sample Custom Taxonomy Hierarchy

The following diagram displays a sample custom taxonomy hierarchy along with its corresponding code list:



Branches A0 and A1 have two levels, while A2 contains branches with three and four levels.

- The leaf nodes represent the lowest levels in each branch of the hierarchy.
- Each leaf node should have only one parent, the hierarchy's roll-up will remain unique.
- Each taxonomy entry must have a unique code and description.
- The branches can have different levels, that is, A0 can have 3 levels and A1 can have 4.

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ParentCodeId	CodeName	Keywords (Optional column with comma-separated values)	Level
A0			1
A01 A0			2
A1			1
A11 A1			2
A12 A1			2
A2	Information Technology		1
A21 A2	IT Software		2

PRI-
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RY_
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_Co
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)

ParentCodeId	CodeName	Keywords (Optional column with comma-separated values)	Level
A21 A21 1			3
A21 A21 2			3
A22 A2	IT Hardware		2
A22 A22 1	Personal Computers		3
A22 A221 11	Desktops		4
A22 A221 12	Laptops		4
A22 A221 2	Servers		3
A22 A222 21	Supplier 1 Servers		4
A22 A222 22	Supplier 2 Servers		4

Define Custom Taxonomy

To define a custom spend taxonomy for your organization, perform the following steps:

1. Choose **Add** in the Taxonomies table.
2. Enter the name of the custom taxonomy and a description.
3. Download the template file and follow the instructions in the file to create the custom hierarchy.
A new row for the taxonomy is created in the Taxonomies table.
4. After you edit and save the taxonomy csv file, go to the page for the custom taxonomy and choose **Upload**.
SAP Spend Analysis and Insights begins uploading and validating the file, and displays the file size and status of the upload.

→ Tip

- If there are errors, the status indicates that the validation failed and provides a link to the error report file.
- In case of errors, make the required corrections to the taxonomy file and upload the file again until the load status changes to successful.

- You can change and load a taxonomy in **In Preparation** status multiple times.
- You can view the taxonomy with the hierarchy in collapsed or expanded mode and you can use the symbols on the taxonomy table.
- After you successfully upload and validate the taxonomy file, choose **Submit for Review** and the taxonomy status changes to **In Review**.
- After you submit the taxonomy, you can't change it until SAP reviews it and the enrichment process is completed for the initial data load, which can take up to four weeks depending on data volume.

Mapping Custom Taxonomies to UNSPSC Codes

Machine learning models predict values using UNSPSC version 25. You can use custom taxonomies by mapping them to UNSPSC codes to achieve the desired classification. You can upload the mapping of custom taxonomies to UNSPSC.

Note

Uploading custom taxonomies yourself is optional. If you choose not to upload a custom taxonomy, SAP's enrichment team automatically provides the mapping as part of the enrichment process.

If you upload custom mapping, consider the following:

- You can map each code in the custom taxonomy to multiple UNSPSC codes.
- You can use a UNSPSC code only once. However, if you need to map the same UNSPSC code to two custom codes, you can extend the UNSPSC taxonomy by adding XXXXXXXX01 to one of the UNSPSC codes.
- After you run the enrichment process, the machine learning model might predict UNSPSC codes that are not included in your list. These codes can be found under the **Unmapped UNSPSC Categories** tab and you must manually map them to your custom taxonomy.
You can view the custom taxonomy with the mappings on the taxonomy page.
- If you have extended UNSPSC codes, you can map custom codes to them by choosing the **Extended UNSPSC** tab. The SAP Internal Audit Team might create extended codes during the data enrichment process. These are Level 5 codes added to the UNSPSC system that provide additional categories to accurately model your organization's spend.

After the initial enrichment process completes, any adjustments needed to the mappings are done by SAP and the mapping file is uploaded. For example, if there are any cases where the same UNSPSC needs to be mapped to two custom values, a Level 5 code is added to the UNSPSC to differentiate the mapping.

After the initial enrichment is completed, SAP updates the custom taxonomy mapping document and the taxonomy status changes from **In Review** to **Active**.

Modifying Custom Taxonomies

You can modify custom taxonomy after the initial enrichment process is completed.

You can:

- Add new UNSPSC codes to the mappings after the initial enrichment is completed by choosing **Add UNSPSC Mappings**.
- Add categories to your custom taxonomy by choosing **Add Categories**.
- Change the name of a custom taxonomy by choosing **Edit**.

Data Enrichment and Review

SAP Spend Analysis and Insights includes multiple data enrichment services that enrich spend data with extended supplier information and commodity code classifications based on the UNSPSC taxonomy. Spend data consists of accounts payable, travel and expense, and/or purchase card data and supplier information from your accounts payable system.

Enrichment Overview

SAP Spend Analysis and Insights consolidates data across multiple sources of spend, then uses multiple supervised machine learning (ML) strategies to predict Spend Taxonomy and Supplier hierarchy values. You or the SAP Enrichment Services audit team then validate these enriched elements directly in the Spend Categorization or Supplier Enrichment user feedback interfaces. This ensures accuracy and confirms the final values that meet your reporting needs. Once approved, these values are then used to provide aggregated analytical reporting in the SAP Spend Analysis and Insights dashboards as well as incorporated into your specific model retraining for future data refresh predictions.

Note

At no point is data shared with any third party.

Data Enrichment Process

SAP Spend Analysis and Insights provides key data enrichment services to ensure that spend data from multiple source systems can be aggregated, filtered, and drilled into in dashboards through common supplier, location, and category hierarchies.

The process of data enrichment for SAP Spend Analysis and Insights is continuous. The **Supplier Enrichment** and **Spend Categorization** options in the application capture your feedback on the enrichment process, allowing data enrichment managers to quickly aggregate and assign enriched values to spend data.

Before you can start the enrichment process, the following prerequisites must be met:

- An administrator or data manager must set all source systems to **Validated** status.
- An administrator or enrichment manager must set any custom taxonomy to **Ready for Review** status.

The following table describes the initial enrichment process.

Step	Task	Responsible Persona or System	Description
1	Customer Validation using Data Validation dashboard	Data Manager	The data loaded in the system is shown in the Data Validation dashboard where the spend amounts and counts can be validated by checking against the source system. Use the entity filters to select the values that will store the records that constitute "spend" by your organization.
2	Set source system to Validated	Data Manager	After the data is checked and the invoice counts and spend match the expected values, the data manager sets the system to Validated state.
3	Start Enrichment	Enrichment Manager	The system checks whether the custom taxonomy has been submitted before making the Start Enrichment button active. If the button is not active, the data manager needs to let the administrator know that the taxonomy must be submitted. Then enrichment can be triggered. This task is owned by the Data Manager. The Enrichment manager is needed only if the administrators must load a custom taxonomy.
4	Enrichment Service - Supplier Matching to D&B	System	The system matches source fields (supplier name/location/industry) against the supplier database to determine the best matching Dun & Bradstreet site-level values.
5	Enrichment Service - Invoice Categorization to UNSPSC (Global Model)	System	The system automatically predicts a UNSPSC hierarchy value from source spend data fields using the initial cold start global model (trained across multiple industries) to boost the audit review process.
6	Human In the Loop Audit Review and Updates	SAP Internal Audit Team	The SAP Internal Audit team reviews all ML predictions up to the spend SLA and ensures values are correct and confirmed. These high confidence values will then show in dashboards and be used to train a customer specific model for future predictions based on a customer's unique purchasing patterns. The team might extend part of the UNSPSC system for your organization. This process add new, Level 5 categories to the UNSPSC system to accurately model your organization's spend.

Step	Task	Responsible Persona or System	Description
7	Customer Specific Model Trained for Future ML Predictions	System	After audit review is completed, the system uses the confirmed labels to train a customer-specific classification model based on your unique purchasing patterns and hierarchy level classifications.
8	Enrichment Service - Invoice Categorization Re-Predictions to UNSPSC (Customer – Specific Model)	System	After the system has a customer specific model trained, it automatically re-predicts the UNSPSC values for the entire dataset based on your unique purchasing patterns and hierarchy level classifications. These values can then be utilized for custom taxonomy mappings.
9	Customer Reviews High and Low Confidence Enriched Values in Feedback UI	Enrichment Manager	You can then evaluate and approve or change low confidence supplier hierarchy labels and spend categories for invoices using the Supplier Enrichment and Spend Categorization options in the application.
10	Customer Reviews Custom Taxonomy Mappings to UNSPSC	Enrichment Manager	After all enrichments are completed, you review the custom taxonomy mappings, especially focusing on any unmapped UNSPSC values to ensure reporting aggregations work properly.
11	Customer Validation with the Enrichment Dashboard	Enrichment Manager	You validate final enriched values from AI/ML, human audit, and customer feedback in the enrichment dashboard to ensure data is aggregating properly based on your custom reporting needs.
12	High-Confidence Enriched Values Surfaced to Dashboards	System	The system completes the enrichment run for a source system and makes high confidence values available to reports, as well as low confidence (non-confirmed) values available to be reviewed in the feedback tools.

The following diagram illustrates the enrichment process.

Enrichment Flow

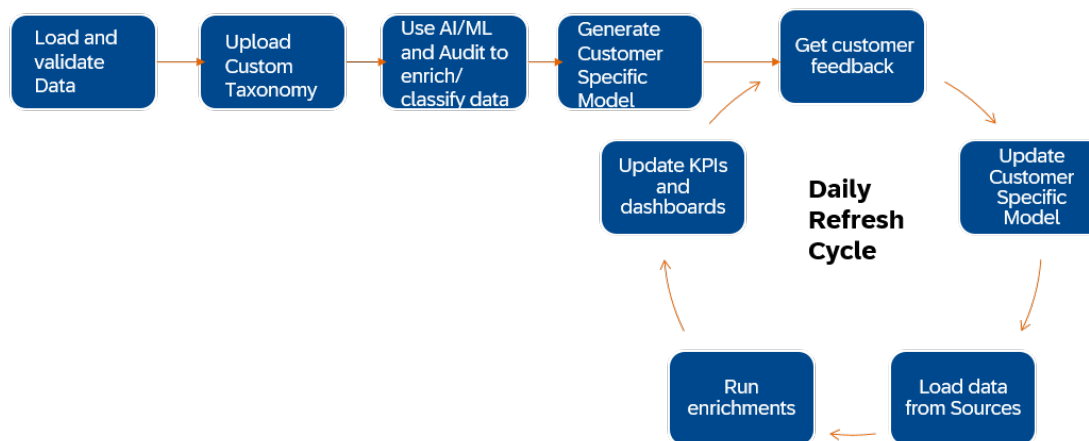


Figure 1: SAP Spend Analysis and Insights Refresh Enrichment Process

Continuous Learning by Customer-Specific ML Model

The SAP Spend Analysis and Insights solution provides a data enrichment service that enriches invoices with category codes and suppliers with business information for you to use in your spend analyses.

The data enrichment service uses advanced machine learning, SAP HANA in-memory technology, and powerful data tools to classify invoices to a purchasing-relevant hierarchy such as UNSPSC and to enrich suppliers with corporate linkages, demographic information, and more. The process is highly automated. However, you can provide feedback on the enriched data, approving supplier hierarchy labels and spend categories for invoices or re-matching them to other hierarchy values based on your reporting needs and expertise. SAP incorporates all customer feedback and retrains a customer-specific model every quarter. This feedback results in more accurate analytics and improved machine learning algorithms over time.

Included Data Enrichments

Two key ML enrichment services are enabled by default.

📌 Note

You must mark the status of datasets as **Validated** and any custom taxonomy as **Ready for Review** before you can start initial enrichment.

- **Supplier Matching:**
 - Uses ML-based rules and strategies to deduplicate and match source fields (supplier name, location, and industry) against our supplier database to determine the best matching Dun & Bradstreet site level values. These then aggregate automatically to global Dun & Bradstreet supplier values for proper hierarchy display, drill-down in reports and dashboards, and access to other extended supplier information.
- **Spend Categorization:**

- Leverages modern Feedforward Neural Network (FFN) classification strategies to automatically predict a UNSPSC hierarchy value from source spend data utilizing fields such as descriptions (invoice, PO, part) and names (ERP commodity, account, supplier, and flex fields 1-3).
- UNSPSC hierarchy levels predicted are directly based on the quality of source information provided.

Note

The enrichment model creation, storage, training, processing, and re-training steps are included in the SAP Spend Analysis and Insights contracted pricing, therefore, SAP Business AI Capacity Unit Tokens are not currently required.

Enriched suppliers and categories are then validated through supervised learning where a human reviews and approves predicted values to ensure accuracy. A team of audit experts labels the data to generate the customer-specific model.

In addition to the top predicted value for audit review, the system also provides suggested supplier alternatives and direct access to taxonomy hierarchies using the SAP Spend Analysis and Insights feedback user interfaces in the event a better match can be determined.

Data Enrichment Auditing Services

If you lack resources or industry expertise to audit your own enriched spend data, you may optionally purchase extended data enrichment audit services after the first year from SAP Ariba. For details of data enrichment audit services, contact your SAP Ariba Customer Success Manager or Account Manager.

Can I Toggle Enrichments On and Off?

Enrichments are core to the ability of SAP Spend Analysis and Insights to provide aggregated dashboard visualizations. Therefore, enrichments are enabled by default. However, you must manually complete a multi-step confirmation process to mark data sources active and run enrichments for the first time.

Note

Data consolidation and enrichments to aggregated hierarchy values are the core value propositions of SAP Spend Analysis and Insights. Without enrichments, because multiple data sources label suppliers and products differently, resulting dashboards won't display accurate, meaningful, and relevant aggregations across these sources.

Machine Learning Models for Invoice Categorization

SAP Spend Analysis and Insights uses a single-tenant architecture to store data and process machine learning models for inference, ensuring complete separation between different customers' information.

Additionally, each customer has their own customer-specific machine learning model trained on their unique purchasing patterns, built after the initial audit verification process.

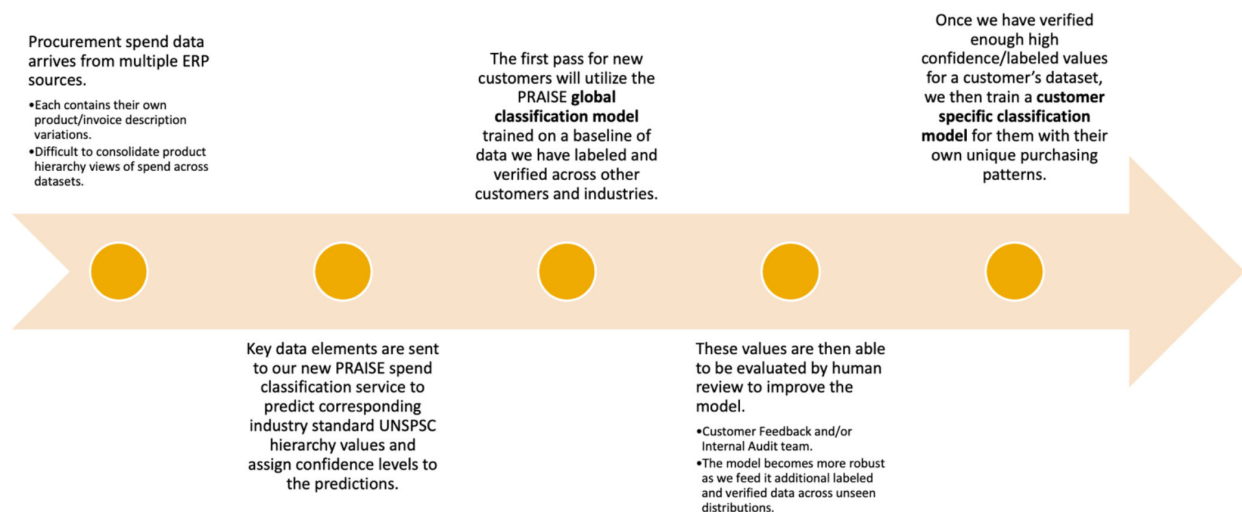
Cold Start “Generic or Global” Model Usage

During the first enrichment pass for a new greenfield customer, a cold start model is used for initial predictions. This model is derived from a very limited anonymized (no quantitative data, only unstructured text descriptions) set of data elements validated across multiple customers to help improve the overall process. This model saves new customers hundreds of initial review and labeling hours and ensures they can begin using validated hierarchy aggregations in dashboards as soon as possible.

By default, customers are opted into sharing a limited set of anonymized data to help improve the cold start model but may request to opt out at any time.

Customer-Specific Models

After the initial cold start, high-confidence predictions and human-validated labels are used to train a customer-specific classification model based on that customer's unique purchasing patterns. This ensures that differentiators within a customer dataset and requested reporting hierarchy are used to train and retrain a unique classification model specific to that customer only.



Artificial Intelligence (AI) and Machine Learning (ML) Data Deletion

Customer data used for audit validation and customer-specific model training is deleted after the process is complete. Additionally, you can request deletion of your data at any time.

Types of Models Used

SAP Spend Analysis and Insights uses supervised learning rules and ML-based, narrow-AI classification models. No data leaves SAP's secure and approved environments and no generative AI abilities are currently used for supplier matching or spend classification. This ensures the safety and accuracy of the SAP Spend Analysis and Insights reported values customers trust to make business decisions. SAP will, however, continue to improve classification technology over time as future models begin to demonstrate the ability to predict categorizations more accurately.

Starting the Enrichment Process

You, as an enrichment manager, can use the Data Validation dashboard to preview data, review high-level metrics, and identify data quality issues that can cause problems with enrichment. Once the data load from the source system is validated, you can start the enrichment process.

Prerequisites

- You must have the enrichment manager role assigned to you.
- By default, the option to start the data enrichment process (the **Start Enrichment** button in the user interface) is disabled. To enable data enrichment:
 - The source system must be set to the **Validated** status by an administrator or a data manager; and
 - The custom taxonomy (if applicable) must be set to the **Submit for Review** status by an administrator or an enrichment manager.
- Ensure that most of the spend data has been loaded before you start enrichment.

Evaluating Source System Readiness for Enrichment

Before starting enrichment for source systems, evaluate the quality of the data to ensure it is clean enough to start enrichment.

1. On the SAP Ariba launchpad, choose **Administration Center**.
2. On the **Administration Center** page, in the left pane, choose ► **Data Management** ► **Spend Insights** ►
3. In the right pane, choose **Source Systems**.

4. Choose the source system that is in the **Needs Review** status.
5. On the **Data Products** tab, verify that all data products are in the **Completed** status.
6. On the **Filter Conditions for Spend Data** tab, choose **Edit** and set the filters that define vendor-related spend in your ERP application, for example, invoice document types.

→ Remember

Once the filter conditions for spend data are defined, do not change them, as this determines the annual spend expected to be processed by the application.

7. Choose **Review Data Quality** to access the dashboard to review the loaded data metrics for expected spend values and counts and to ensure that the required fields are populated.
8. Query the source system to compare the record counts and spend amounts with those shown in the Data Validation dashboard.
9. Verify whether the source system data matches the values displayed in the Data Validation dashboard.
 - If yes, choose **Edit** and change the status to **Validated**.
 - Otherwise, correct the spend data.

Starting Enrichment for a Source System

1. On the SAP Ariba launchpad, choose **Administration Center**.
2. On the **Administration Center** page, in the left pane, choose ► **Data Management** ► **Spend Insights** ►.
3. In the right pane, choose **Source Systems**.
4. Choose **Start Enrichment**.

Supplier Enrichment

Supplier Enrichment enables category reviewers to provide feedback, confirm matches, or select alternate matches for the source system suppliers.

SAP Spend Analysis and Insights uses the Dun & Bradstreet database to match suppliers. This database provides enriched information on the global ultimate (the highest level company), which enables the consolidation of supplier spend and contracts. It also provides diversity information and green supplier flags.

SAP Spend Analysis and Insights matches all suppliers on the invoices included for spend.

Approving Matched Suppliers

Use the **Spend Insights: Supplier Enrichment** page to view all of your enriched and aggregated supplier records to approve them or rematch them to values that work better for your reporting needs. Any changes are then used to improve future predictions.

Prerequisites

You must have the Enrichment Manager role assigned to you.

Context

Evaluate and confirm supplier matches for more accurate analytics and better predictions in future data refreshes.

The data enrichment service uses machine learning to automatically approve suppliers that match with high confidence. Review any low confidence or no match predictions to approve them or rematch them with alternate candidates.

After you confirm a supplier match, a green checkmark (✓) appears in the **Status** column for the corresponding supplier.

Procedure

1. On the SAP Ariba launchpad, choose **Spend Insights > Supplier Enrichment**.
The search filters and **Site-Level Suppliers** table display. The table initially lists suppliers with status **Needs Review**; to list suppliers with other statuses, change the search filter.

The message strip at the top of the page shows the enrichment status:

- Refresh in progress: Enrichment is currently in progress. Data might be partially updated.
- Completed: Enrichment has completed. The message strip has links to the **Supplier Enrichment Overview** and **Spend Categorization Overview** dashboards and the **Spend Categorization Feedback Tool**.
- Failed: Enriched failed due to errors. The message strip has a link to open a support ticket.

2. Enter your search criteria to filter the **Site-Level Suppliers** table.

The following search filters are available:

- Free text search: Enter partial or full text to filter by site-level or global ultimate parent supplier names.
- **Global Ultimate Parent**: Filter results based on the global ultimate parent supplier. Choose **Select Items** (📦) to select one or more global ultimate parent suppliers.
- **Changed On**: Filter results based on a date range.
- **Matching Status**: Filter results based on one or more supplier statuses. Available values are:
 - **Confirmed**: The match was reviewed and confirmed.
 - **Needs Review**: The match requires manual confirmation.

- **Not Enriched:** No enrichment has been applied to the supplier record.
 - **No Match:** A match was not found.
- For a supplier in the **Site-Level Suppliers** table, click **Details** (🔍) on the right to view potential matches. The recommended site-level supplier and **Matched Source System Suppliers** table displays. Use this page to either confirm supplier matches or change supplier matches.

You can choose the **supplier** link in the page header to open a window that displays: supplier name, global ultimate supplier, full address, trade style, and SIC names.
 - To confirm or change supplier matches, remove supplier aggregation by adding the **Supplier ID** column to the table:
 - Click **Settings** (⚙️).
 - Click the box next to **Supplier ID** and click **OK** to add the Supplier ID column to the table.
 - If the suppliers match, select suppliers in the table and click **Confirm Match**. You can select multiple suppliers to confirm them all in a single operation
When you confirm a supplier match, the changes are not immediately reflected in the dashboard. Background processing jobs must run before the updates appear. These jobs run at regular intervals to ensure that enriched data is properly applied to analytics.
 - If the suppliers are not a good match, choose different suppliers:
 - Select the incorrect supplier in the list and choose **Change Match**.
The **Select an Alternate Supplier** window appears. It might display recommended supplier matches.
 - If a listed supplier is a good match, select it and click **Match Supplier**.
 - If you don't find a suitable match, click **Search Supplier Database** to manually search for other suppliers by name and country. This global searching is useful when the recommended matches aren't relevant, and you want to explore all available supplier records. When you find a suitable supplier, select it and click **Match Supplier**.

Spend Categorization

Enrichment managers use the Spend Categorization tool to evaluate and confirm invoice line-item categorization for more accurate analytics, improved enrichment models, and to provide feedback on category prediction.

Spend Categorization lists aggregated invoice items and provides searching to help you find items that need review. You can view categorization by invoice item or category, which is helpful for examining large amounts of spend data. You can also save search criteria and apply a saved search to filter invoice items.

Evaluate correct invoice line-item categorization by identifying items for review and then applying consistent categorization.

Each invoice line item has one of the following classification statuses:

Status	Description
Needs Review	The machine learning prediction confidence is not high enough for automatic confirmation. These items require human review.

Status	Description
Confirmed	The classification was confirmed, either through high-confidence machine learning predictions or by human review. Confirmed values appear in the spend dashboards and contribute to future model retraining.
Not Categorized	The item has not yet been through enrichment or audit.

You can use the **Spend Taxonomy** selector to switch between UNSPSC and custom taxonomies.

Use the following views to help evaluate and confirm invoice line-item categorization:

- **View by Invoice Items** (default) lists aggregated invoice items and provides searching to help you find items that need review. See [Confirming Categories in the Invoice Items View \[page 24\]](#).
- **View by Category** shows invoice items that need review, grouped by category code. See [Confirming Categories in the Category View \[page 25\]](#).

Confirming Categories in the Invoice Items View

The **Spend by Invoice Items** view enables you to evaluate and confirm the correct invoice line-item categorization for more accurate analytics and improved enrichment models.

Prerequisites

You must have the Enrichment Manager role assigned to you.

Context

Use the **Spend by Invoice Items** page to confirm and match invoice line items to spend categories.

To view category items instead, click **View by Category** at the top of the page.

To understand available categories, click **Spend Categorization Report** at the top of the page. This report displays spend transactions by GL account and product group against the spend taxonomy.

Procedure

1. From the SAP Ariba launchpad, choose **Spend Insights** > **Spend Categorization** .
The **Spend by Invoice Items** page displays.
2. Enter and select your search criteria and choose **Go** to view invoice items that meet your criteria.
Optionally, click **All Filters** to add or remove the search filters displayed.

Choose the [dropdown menu](#) icon to the right of **Spend by Invoice Items** to save and manage your search views.

Note

Your saved views are available to only you and are not shared with other users.

3. Select a row in the **Categories** table to see invoice items with category values that need review.
4. If the category value is correct, select the invoice item and choose **Confirm Categorization**.
The selected invoice items are confirmed and saved.
5. If the category value is incorrect, select the invoice item and choose **Recategorize** to select an alternate category.
The **Select a Category** dialog box opens.
6. Select a different category and choose **Select**.
7. If a custom category maps to multiple UNSPSC codes, an intermediate window displays that allows you to select which UNSPSC code to apply.
8. Choose **Confirm Recategorization** to confirm the new categorization.

Confirming Categories in the Category View

The **Spend by Category** view enables you to evaluate and confirm invoice line item categorization by viewing aggregated invoice items and using a multi-functional search.

Prerequisites

You must have the Enrichment Manager role assigned to you.

Context

Use the **Spend by Category** page to confirm and match spend categories to invoice line items.

To view invoice items instead, click **View by Invoice Items** at the top of the page.

To understand available categories, click **Spend Categorization Report** at the top of the page. This report displays spend transactions by GL account and product group against the spend taxonomy.

Procedure

1. From the SAP Ariba launchpad, choose  **Spend Insights**  **Spend Categorization** .
- By default, the **Invoice Items View** page opens.

2. Click **View by Category**.
A list of all spend categories displays.
3. Enter and select your search criteria to find items that meet your criteria.
Optionally, click **All Filters** to add or remove the search filters displayed.
Choose the  *dropdown* icon to the right of **Spend by Category** to save and manage your search views.

Note

Your saved views are available to only you and are not shared with other users.

4. Optionally, expand a category to see lower-level categories.
5. Choose **Details** () on the right to display the **Consolidated Invoice Items** list.
At the top of the window, a message strip indicates the next step, such as "Review and confirm the categorization of the invoice items or recategorize if required..."
6. Select a row in the table with a category value that needs review.
7. If the category value is correct, select the invoice item and choose **Confirm Categorization**.
The selected invoice items are confirmed and saved.
8. If the category value is incorrect, select the invoice item and choose **Recategorize** to select an alternate category.
The **Select a Category** dialog box opens.
9. Select a different category and choose **Select**.
10. If a custom category maps to multiple UNSPSC codes, an intermediate window displays that allows you to select which UNSPSC code to apply.
11. Choose **Confirm Recategorization** to confirm the new categorization.

You can use SAP Spend Analysis and Insights spend dashboards to make spend decisions based on analysis of spend data.

- [Data Validation Dashboard \[page 27\]](#)
- [Spend Categorization Overview Dashboard \[page 35\]](#)
- [Supplier Enrichment Overview Dashboard \[page 39\]](#)
- [Spend Overview — Summary and Compliance Dashboard \[page 46\]](#)

You can use the **Data Validation** dashboard to analyze the accuracy, completeness, and consistency of spend data loaded from source systems.

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Data Quality



By default, you can filter the data by the following dimensions:

- **Posting Date Range**
- **Source System**
- **Supplier**
- **Company Code**
- **Plant**
- **Purchasing Organization**

Key Performance Indicators (KPIs) and Widgets

For the details of the KPIs and the widgets on the respective tabs, see:

- [Transaction Data Overview Tab \[page 28\]](#)
- [Transaction Data Details Tab \[page 30\]](#)
- [Supplier Tab \[page 32\]](#)
- [Other Master Data Tab \[page 33\]](#)

Transaction Data Overview Tab

The **Transaction Data Overview** tab of the **Data Validation** dashboard shows a summary of the accuracy, completeness, and consistency of spend data loaded from source systems.

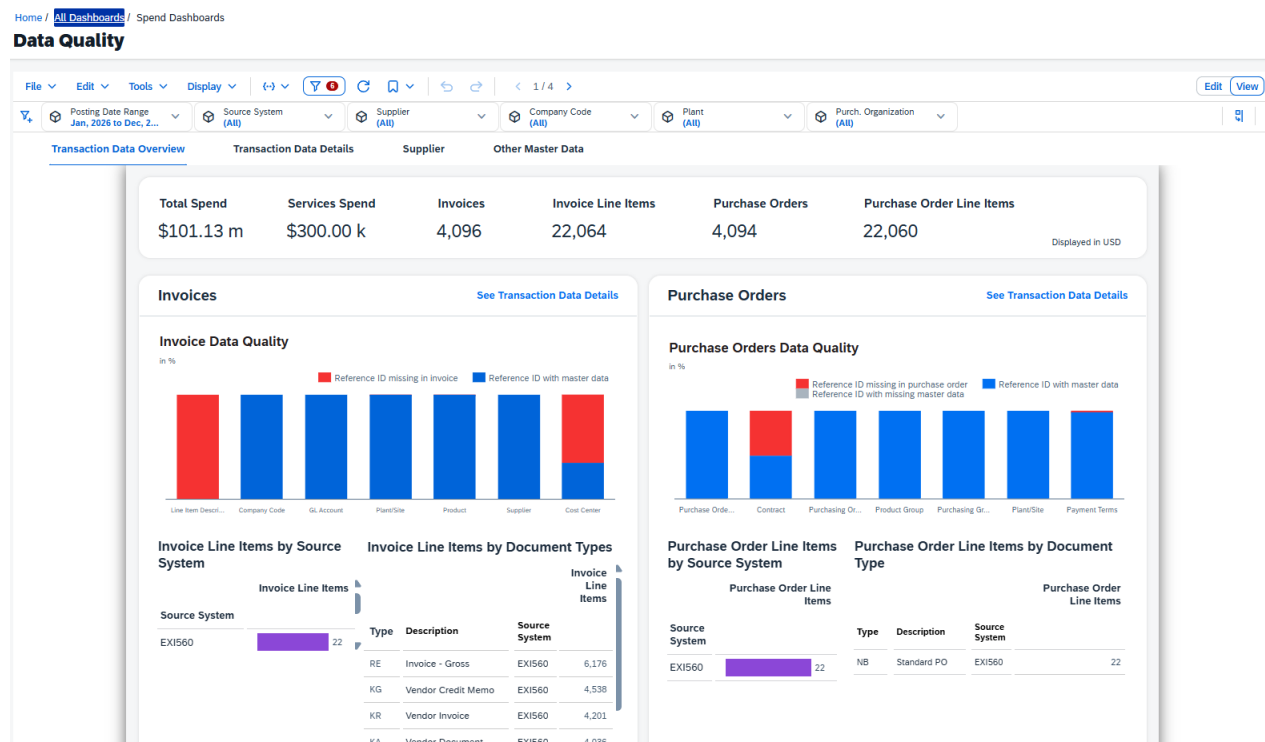


Figure 3: Data Validation Dashboard: Transaction Data Overview Tab

Key Performance Indicators (KPIs)

On the **Transaction Data Overview** tab, the following KPIs summarize the data for the specified posting date range:

Key Performance Indicator	Description
Total Spend	Sum of supplier-related invoices from general ledger postings in reporting currency.
Services Spend	Sum of the transactions related to services in reporting currency.
Invoices	Number of unique invoices related to the total spend amount.
Invoice Line Items	Total number of line items in the invoices.
Purchase Orders	Number of purchase orders referenced in the invoices.
Purchase Order Line Items	Total number of line items in the purchase orders.

→ Remember

The currently selected filters affect all KPI values.

Widgets

The **Transaction Data Overview** tab has the following widgets:

Widget	Description
Invoice Data Quality	A stacked bar chart showing data completeness across the following invoice dimensions: Line Item Description, Company Code, GL Account, Plant/Site, Product, Supplier, and Cost Center.
Invoice Line Items by Source System	A horizontal bar chart showing invoice line items by source system.
Invoice Line Items by Document Type	A table showing the number of invoice line items grouped by document type and source system.
Purchase Order Data Quality	A stacked bar chart showing data completeness across the following purchase order dimensions: Purchase Order, Contract, Purchasing Organization, Product Group, Purchasing Group, Plant/Site, and Payment Terms.
Purchase Order Line Items by Source System	A horizontal bar chart showing purchase order line items by source system.
Purchase Order Line Items by Document Type	A table showing the number of purchase order line items grouped by purchasing document type and source system.

📘 Note

The stacked bar charts in the **Invoice Data Quality** and **Purchase Order Data Quality** widgets have the following color-coded segments:

- **Red:** Invoices or purchase orders posted without reference IDs.
- **Blue:** Invoices or purchase orders posted with reference IDs that are found in master data.
- **Gray:** Invoices or purchase orders posted with reference IDs that are not found in master data.

Transaction Data Details Tab

The **Transaction Data Details** tab of the **Data Validation** dashboard shows the details of the spend data loaded from source systems.

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Data Quality

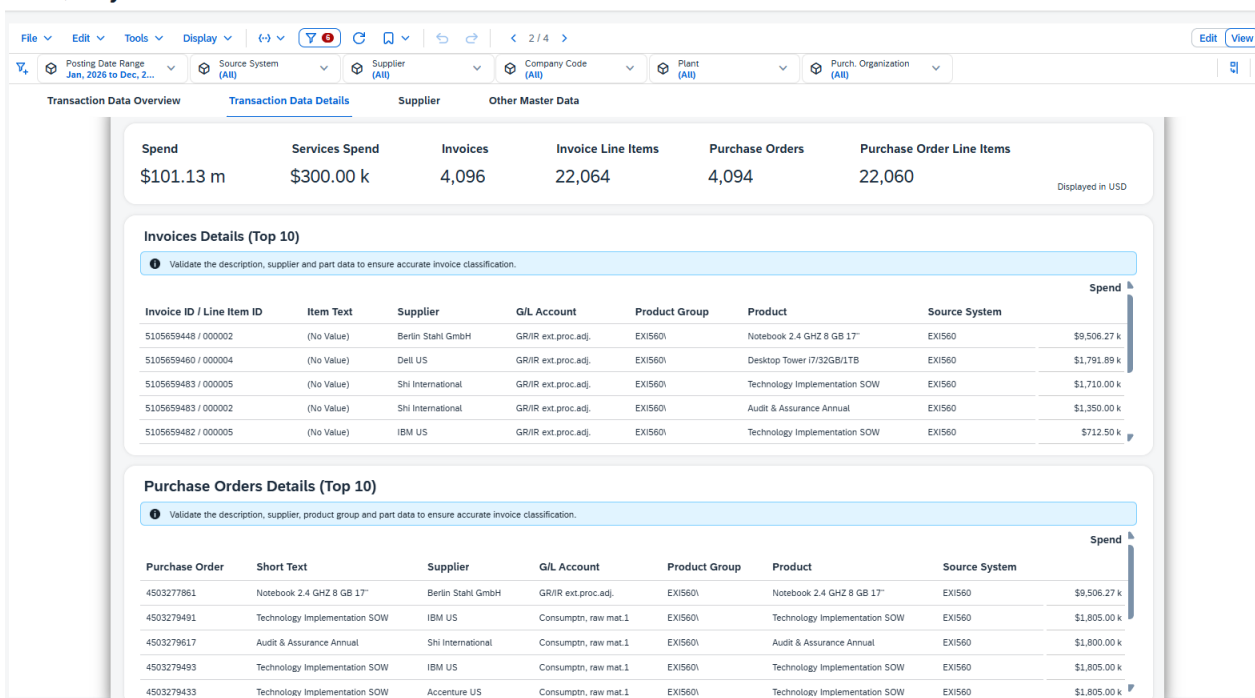


Figure 4: Data Validation Dashboard: Transaction Data Details Tab

Key Performance Indicators (KPIs)

On the **Transaction Data Details** tab, the following are the KPIs for the specified posting date range:

Key Performance Indicator	Description
Spend	Sum of vendor-related transactions from general ledger postings in reporting currency.
Services Spend	Sum of the transactions related to services in reporting currency.
Invoices	Number of unique invoices related to the total spend amount.
Invoice Line Items	Total number of line items in the invoices.
Purchase Orders	Number of purchase orders referenced in the invoices.

Key Performance Indicator	Description
Purchase Order Line Items	Total number of line items in the purchase orders.

→ Remember

The currently selected filters affect all KPI values.

Widgets

The **Transaction Data Details** tab has the following widgets:

Widget	Description
Invoice Details (Top 10)	A table showing the top 10 invoice line items by spend, including invoice ID, line item ID, item text, supplier, G/L account, product group, product, and source system.
Purchase Order Details (Top 10)	A table showing the top 10 purchase order line items by spend, including purchase order number, short text, supplier, G/L account, product group, product, and source system.

Supplier Tab

The **Supplier** tab of the **Data Validation** dashboard shows the details of the suppliers loaded from source systems.

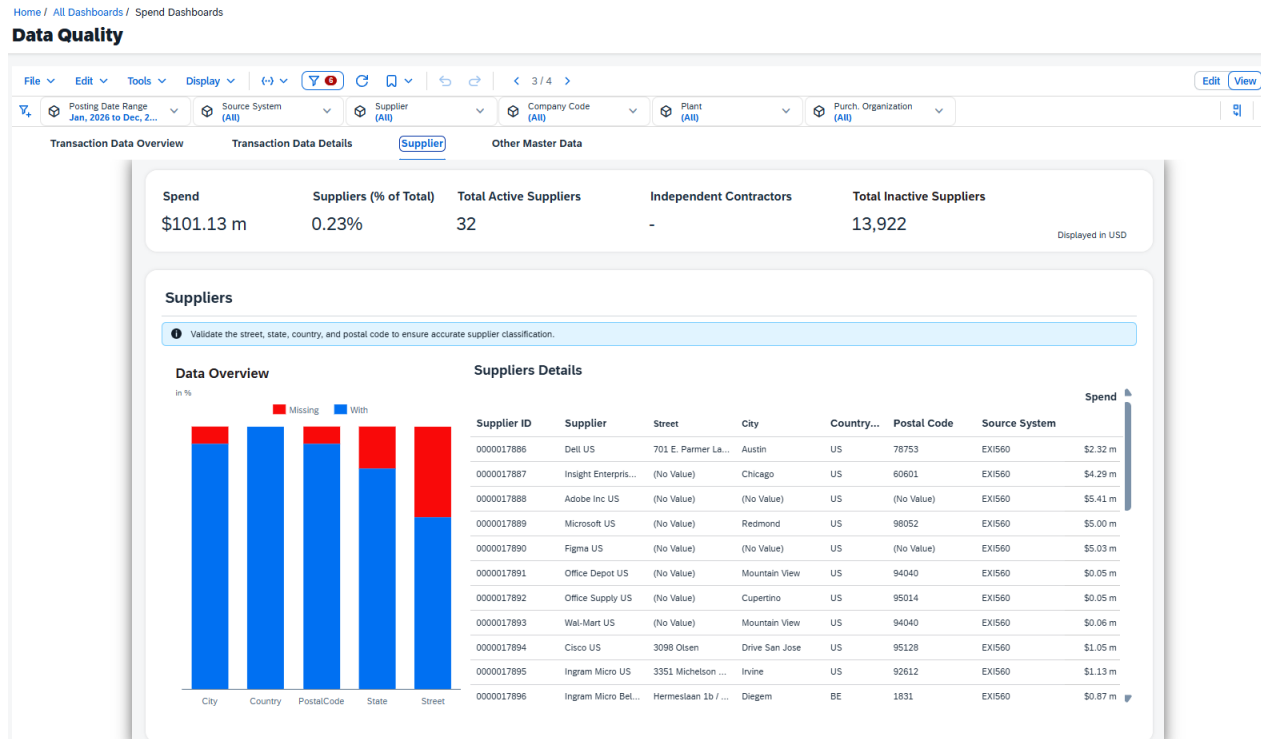


Figure 5: Data Validation Dashboard: Supplier Tab

Key Performance Indicators (KPIs)

On the **Supplier** tab, the following are the KPIs for the specified posting date range:

Key Performance Indicator	Description
Spend	Sum of vendor-related transactions from general ledger postings in reporting currency.
Suppliers (% of Total)	Percentage of the active suppliers. Active suppliers are the suppliers who have had invoice transactions in the selected date range.
Total Active Suppliers	Number of active suppliers.
Independent Contractors	Number of independent contractors. Independent contractors are the suppliers who are identified as natural persons (by a setting on the supplier record).
Total Inactive Suppliers	Number of inactive suppliers. Inactive suppliers are the suppliers who have had no invoice transactions in the selected date range.
Displayed in <Currency>	Label showing the display currency in use.

→ Remember

The currently selected filters affect all KPI values.

Widgets

The **Supplier** tab has the following widgets:

Widget	Description
Data Overview	Percentage comparison of the suppliers with and without the details like city, country, postal code, state, and street.
Supplier Details	A table showing the suppliers loaded from source systems, including supplier ID, supplier name, street, city, country, postal code, and source system.

Other Master Data Tab

The **Other Master Data** tab of the **Data Validation** dashboard shows the details of the following master data loaded from source systems: GL accounts, product groups, products, company codes, company sites/plants, cost centers, and profit centers.

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Data Quality

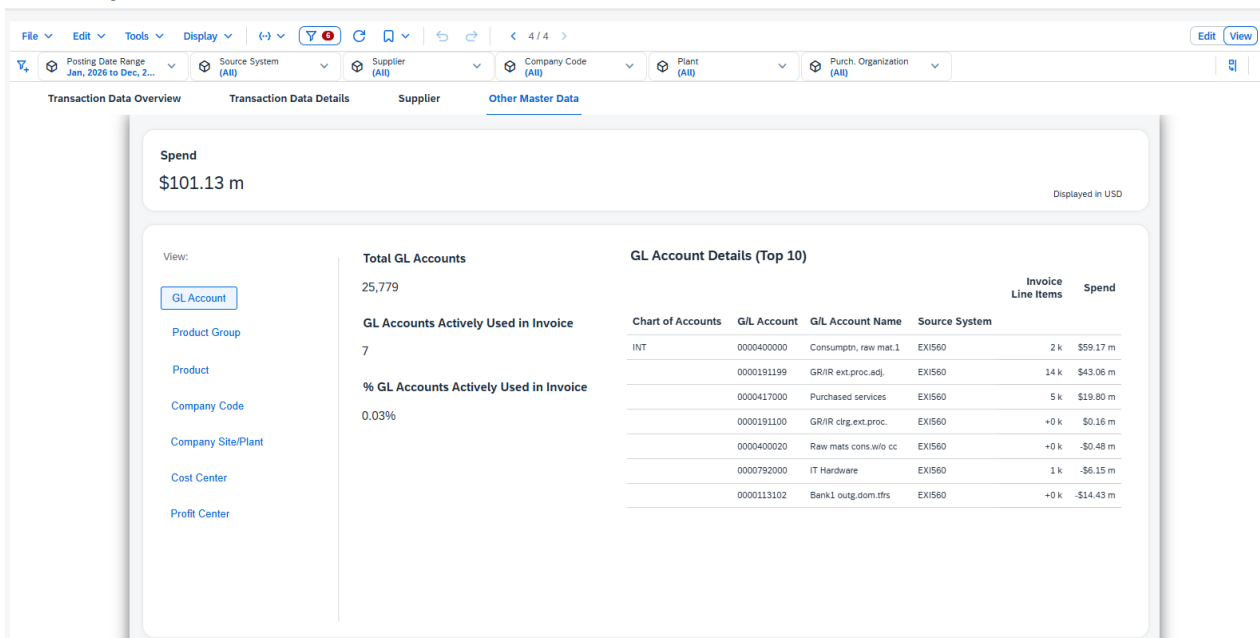


Figure 6: Data Validation Dashboard: Other Master Data Tab

Key Performance Indicators (KPIs)

On the **Other Master Data** tab, the following are the KPIs for the specified posting date range:

Key Performance Indicator	Description
Spend	Sum of vendor-related transactions from general ledger postings in reporting currency.

Key Performance Indicator	Description
Displayed in <Currency>	Label showing the display currency in use.
Total <Master Data Type>	Total count of master data records of the selected type in the source system. The KPI name varies based on the selected view. For example, Total GL Accounts or Total Product Groups .
<Master Data Type> Actively Used in Invoice	Number of master data values of the selected type that appear in invoices in the selected date range. The KPI name varies based on the selected view. For example, GL Accounts Actively Used in Invoice or Product Groups Actively Used in Invoice .
% <Master Data Type> Actively Used in Invoice	Percentage of master data values of the selected type that appear in invoices in the selected date range. The KPI name varies based on the selected view. For example, % GL Accounts Actively Used in Invoice or % Product Groups Actively Used in Invoice .

→ Remember

The currently selected filters affect all KPI values.

Widgets

You need to choose the respective view in the left panel to view the widgets on the **Other Master Data** tab, which has the following widgets:

View	Description
GL Account (default)	A table showing the top 10 GL accounts by spend, including chart of accounts, G/L account, G/L account name, source system, invoice line items, and spend.
Product Group	A table showing the top 10 product groups by spend, including product group, product group description, source system, invoice line items, and spend.
Product	A table showing the top 10 products by spend, including product, product description, source system, invoice line items, and spend.
Company Code	A table showing the top 10 company codes by spend, including company code, company name, source system, invoice line items, and spend.
Company Site/Plant	A table showing the top 10 company sites/plants by spend, including plant, plant name, source system, invoice line items, and spend.
Cost Center	A table showing the top 10 cost centers by spend, including controlling area, cost center, cost center description, source system, invoice line items, and spend.

View	Description
Profit Center	A table showing the top 10 profit centers by spend, including controlling area, profit center, profit center name, source system, invoice line items, and spend.

Spend Categorization Overview Dashboard

The **Spend Categorization Overview** dashboard provides a summary of the invoice categorization results after data enrichment.

The **Spend Categorization Overview** dashboard shows the results of the invoice categorization process based on Machine Learning and Human Audit in Spend Analysis and Insights. It provides insights into the aggregated view of spend before and after enrichment, and the following views:

- The **Confirmed** tab shows where the classifications were confirmed with high confidence and the spend is published to the Spend Overview dashboard.
- The **Needs Review** tab shows the spend and transactions where the predictions could not be confirmed and need human review. These transactions can be confirmed or recategorized in the feedback tool.

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Spend Categorization Overview

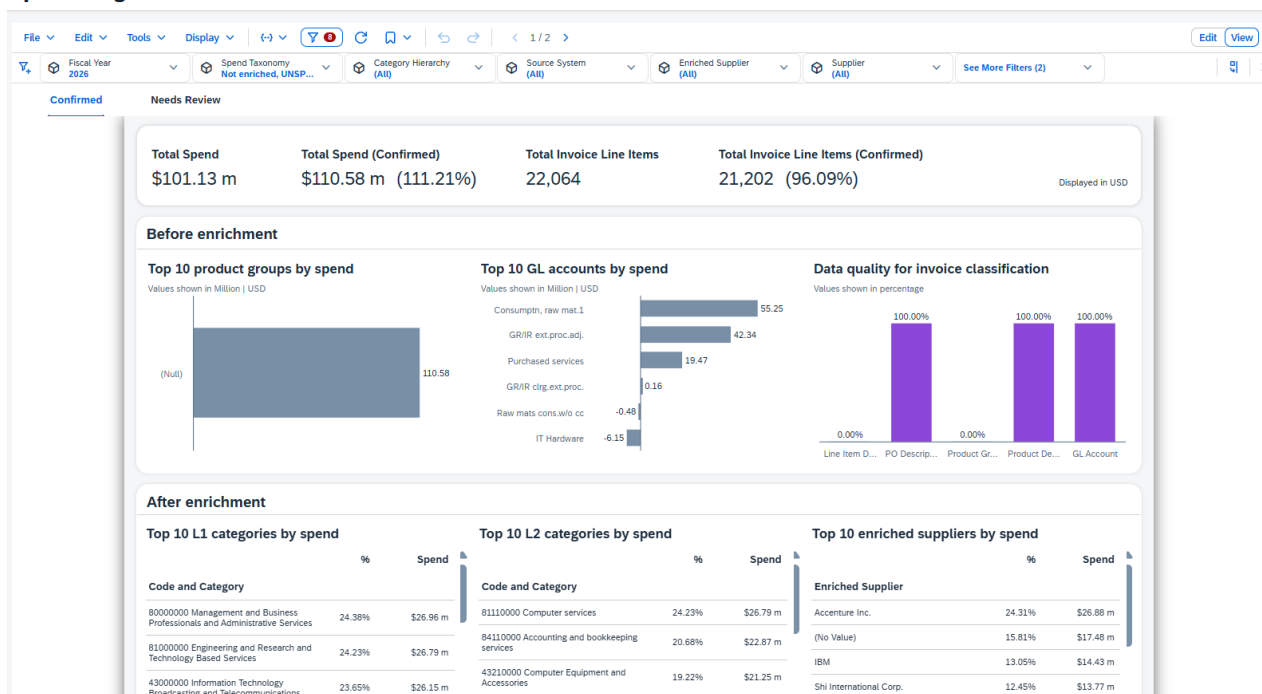


Figure 7: Spend Categorization Overview Dashboard

By default, you can filter the data by the following dimensions:

- **Fiscal Year**
- **Spend Taxonomy**

- Category Hierarchy
- Source System
- Enriched Supplier
- Supplier
- Company Code
- Plant

Key Performance Indicators (KPIs) and Widgets

For the details of the KPIs and the widgets on the respective tabs, see:

- [Confirmed Tab \[page 36\]](#)
- [Needs Review Tab \[page 38\]](#)

Confirmed Tab

The **Confirmed** tab of the **Spend Categorization Overview** dashboard shows a summary of the spend categories that are confirmed with high confidence and the spend is published to the **Spend Overview — Summary and Compliance** dashboard.

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Spend Categorization Overview

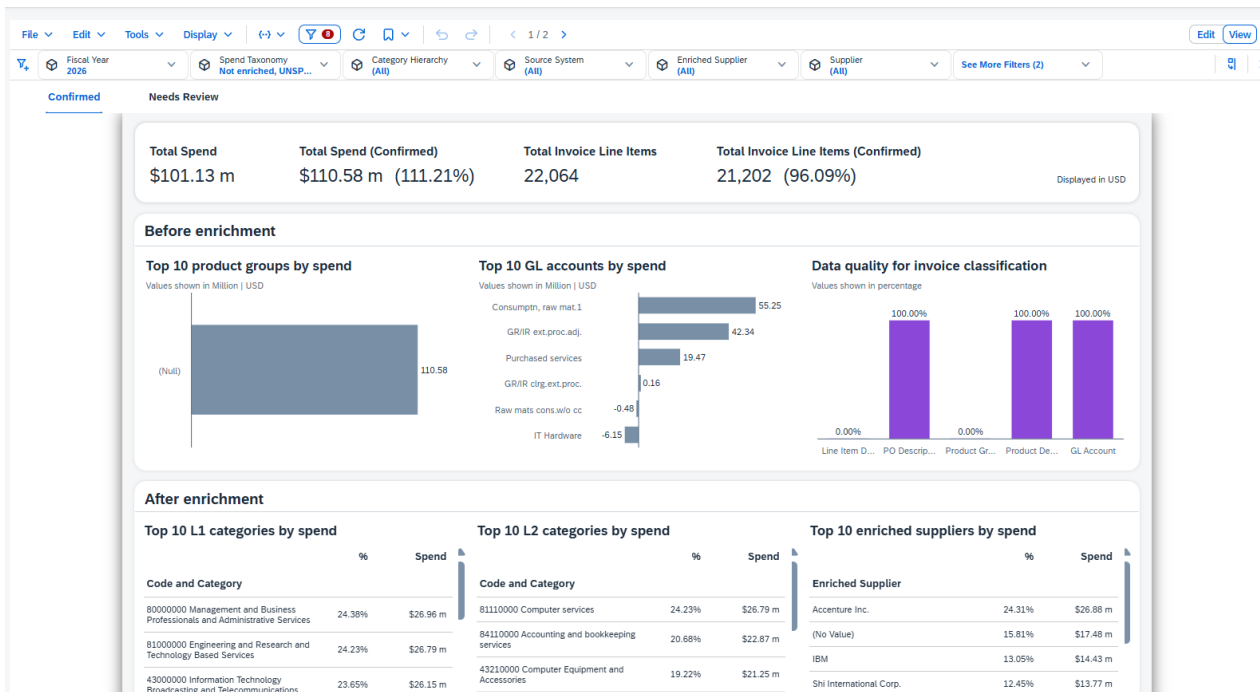


Figure 8: Spend Categorization Overview Dashboard: Confirmed Tab

Key Performance Indicators (KPIs)

On the **Confirmed** tab, the following KPIs summarize the data for the 12-month period in the fiscal year:

Key Performance Indicator	Description
Total Spend	Total invoiced spend converted to the reporting currency.
Total Spend (Confirmed)	Share of total spend covered by high-confidence taxonomy classifications.
Total Invoice Line Items	Count of the invoice line items.
Total Invoice Line Items (Confirmed)	Count of the line items where the taxonomy classification is confirmed with high confidence.
Displayed in <Currency>	Label showing the display currency in use.

→ Remember

The currently selected filters affect all KPI values.

Widgets

The **Confirmed** tab has the following widgets:

Widget	Description
Top 10 product groups by spend	A bar chart showing top 10 product groups by spend (before enrichment).
Top 10 GL accounts by spend	A bar chart showing top 10 GL accounts by spend (before enrichment).
Data quality for invoice classification	A bar chart showing the percentage of data quality for invoice classification (before enrichment).
Top 10 L1 categories by spend	A chart showing the top 10 level-1 spend taxonomy categories with the highest spend, including code and category, percentage, and spend.
Top 10 L2 categories by spend	A chart showing the top 10 level-2 spend taxonomy categories with the highest spend, including code and category, percentage, and spend.
Top 10 enriched suppliers by spend	A chart showing the top 10 enriched suppliers by spend, including enriched supplier, percentage, and spend.

Needs Review Tab

The **Needs Review** tab of the **Spend Categorization Overview** dashboard shows a summary of the spend categories for which the matches are found but cannot be confirmed with high confidence and so need human review.

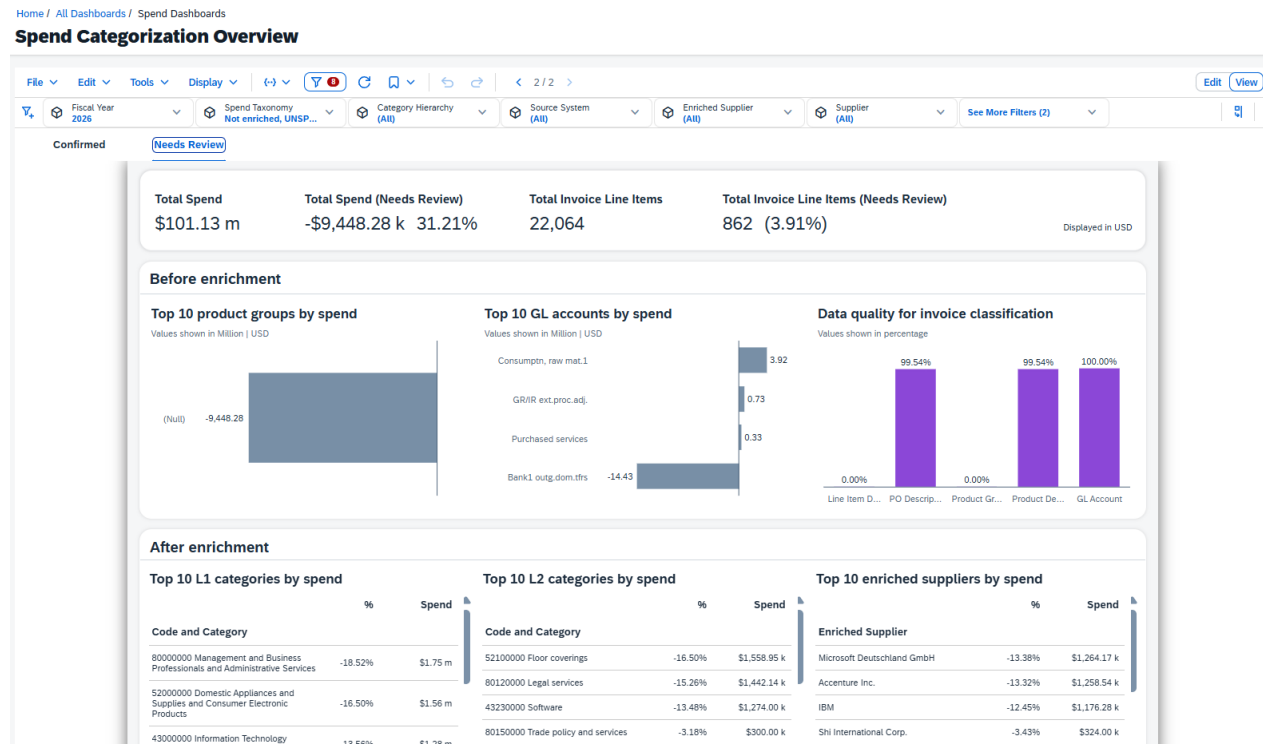


Figure 9: Spend Categorization Overview Dashboard: Needs Review Tab

Key Performance Indicators (KPIs)

On the **Needs Review** tab, the following KPIs summarize the data for the 12-month period in the fiscal year:

Key Performance Indicator	Description
Total Spend	Total invoiced spend converted to the reporting currency.
Total Spend (Needs Review)	Share of total spend covered by low-confidence taxonomy classifications.
Total Invoice Line Items	Count of the invoice line items.
Total Invoice Line Items (Needs Review)	Count of the invoice line items with a low-confidence taxonomy classification.
Displayed in <Currency>	Label showing the display currency in use.

→ Remember

The currently selected filters affect all KPI values.

Widgets

The **Needs Review** tab has the following widgets:

Widget	Description
Top 10 product groups by spend	A bar chart showing top 10 product groups by spend (before enrichment).
Top 10 GL accounts by spend	A bar chart showing top 10 GL accounts by spend (before enrichment).
Data quality for invoice classification	A bar chart showing the completeness of the data that is used for invoice classification (before enrichment). Missing data can lead to low-confidence predictions.
Top 10 L1 categories by spend	A chart showing the top 10 level-1 spend taxonomy categories with the highest spend, including code and category, percentage, and spend.
Top 10 L2 categories by spend	A chart showing the top 10 level-2 spend taxonomy categories with the highest spend, including code and category, percentage, and spend.
Top 10 enriched suppliers by spend	A chart showing the top 10 enriched suppliers by spend, including enriched supplier, percentage, and spend.

Supplier Enrichment Overview Dashboard

The **Supplier Enrichment Overview** dashboard provides a summary of the Dun and Bradstreet supplier match results from the enrichment process.

The **Supplier Enrichment Overview** dashboard provides the results of the supplier matching to the Dun and Bradstreet database. The dashboard has the following views:

- The **Overview** tab shows the percentage of suppliers that found a match in the Dun and Bradstreet database and the corresponding spend. The waterfall chart shows the consolidation achieved by removing duplicates as well as by finding the suppliers that roll up to the Global Ultimate.
- The **Match Confirmed** tab shows the details of the suppliers that have confirmed matches in the Dun and Bradstreet database. The charts show the Global Ultimates by the number of source system suppliers to indicate the suppliers with the maximum consolidation.
You can choose a global ultimate supplier in the top-left widget to view the list of source system suppliers in the top-right widget. L1 categories as well as the products related to these suppliers are also provided.
The dashboard can be used to consolidate contracts as well as supplier spend.
- The **Needs Review** tab shows those suppliers that the system found the best match possible for in the Dun and Bradstreet database but the match is not confirmed with high confidence, so the matches need to be reviewed in the supplier feedback tool.
The top-right chart shows the count of suppliers in each source system that fall into the needs review status.
You can choose a source system to view the list of relevant suppliers.
The low-confidence match usually occurs due to data quality issues in the supplier record from the source system. The bottom-right chart shows the completeness of the address fields in the records that determine the match.

The dashboard can be used to determine the data quality and to determine where to focus on in the feedback tool.

- The **No Match Found** tab shows the suppliers that do not exist in the Dun and Bradstreet database. As the coverage of the Dun and Bradstreet database can vary by region, the top-left chart shows the count of supplier by country where the supplier is located. The top-right chart shows the spend related to these suppliers. The dashboard can be used to find alternate sources of supplier data in these regions.

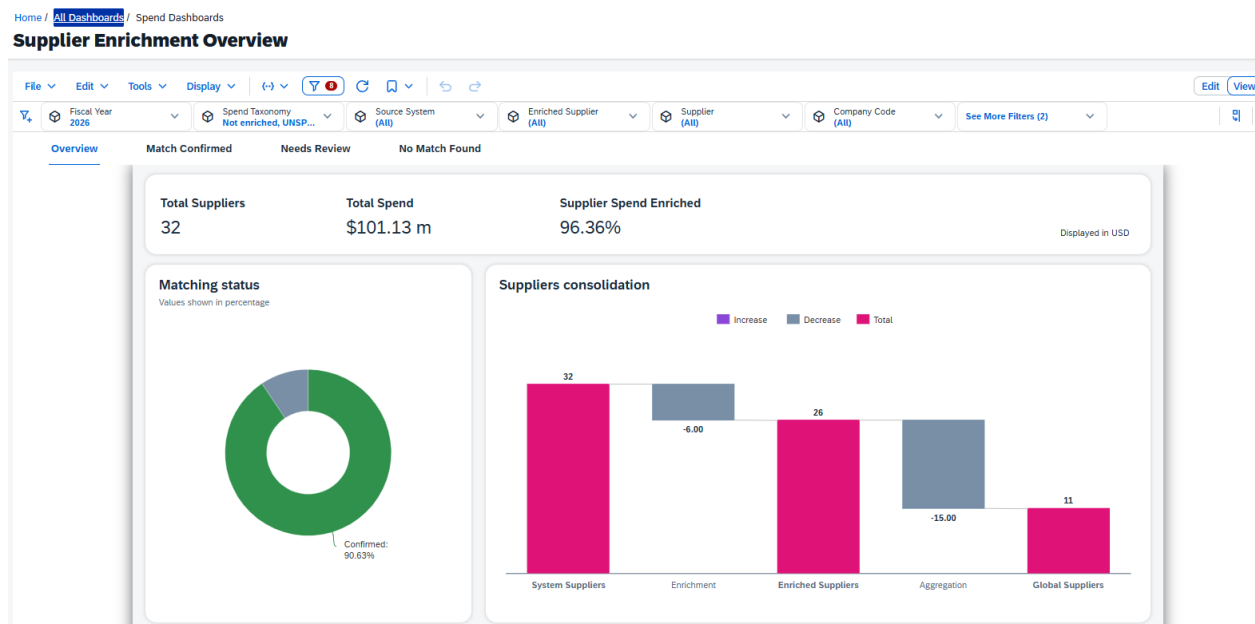


Figure 10: Supplier Enrichment Overview Dashboard

By default, you can filter the data by the following dimensions:

- Fiscal Year
- Spend Taxonomy
- Source System
- Enriched Supplier
- Supplier
- Company Code
- Country
- Plant

Key Performance Indicators (KPIs) and Widgets

For the details of the KPIs and the widgets on the respective tabs, see:

- [Overview Tab \[page 41\]](#)
- [Match Confirmed Tab \[page 42\]](#)
- [Needs Review Tab \[page 44\]](#)
- [No Match Found Tab \[page 45\]](#)

Overview Tab

The **Overview** tab of the **Supplier Enrichment Overview** dashboard shows a summary of the matching status and the suppliers' consolidation.

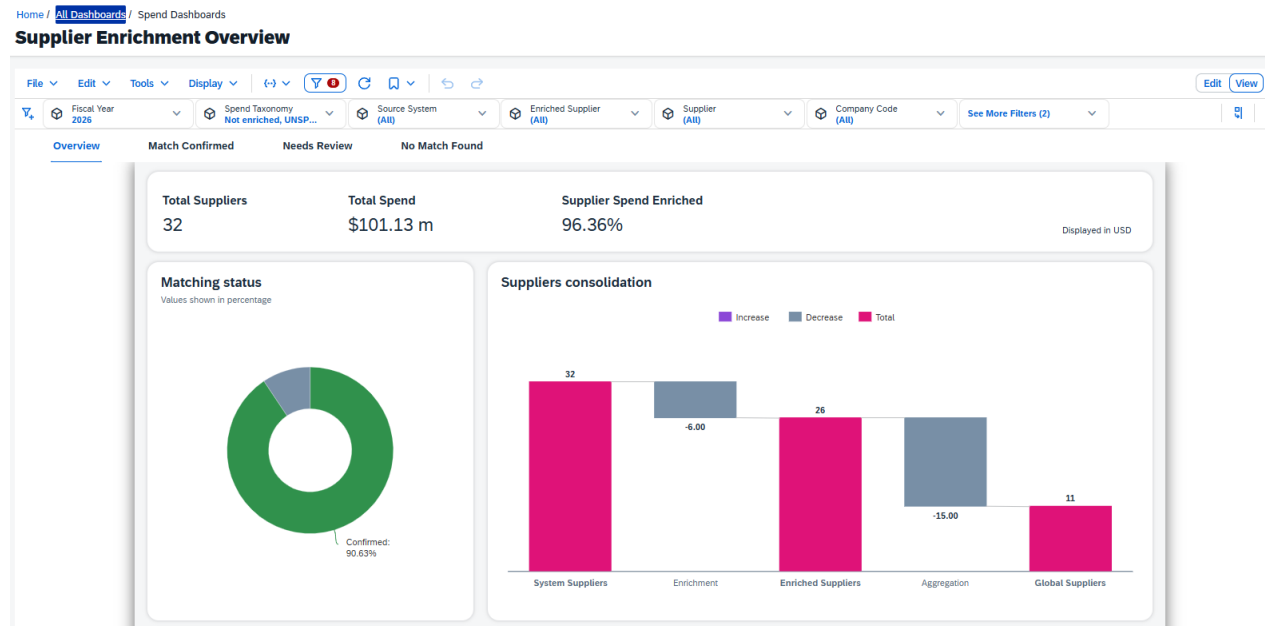


Figure 11: Supplier Enrichment Overview Dashboard: Overview Tab

Key Performance Indicators (KPIs)

On the **Overview** tab, the following KPIs summarize the data for the 12-month period in the fiscal year:

Key Performance Indicator	Description
Total Suppliers	Number of unique suppliers
Total Spend	Total spend for the suppliers
Supplier Spend Enriched	Percentage of spend for which the supplier has a confirmed match in the D&B database
Displayed in <Currency>	Label showing the display currency in use

→ Remember

The currently selected filters affect all KPI values.

Widgets

The **Overview** tab has the following widgets:

Widget	Description
Matching Status	A donut chart comparing the matches confirmed, matches needing reviews, and no matches found.
Suppliers Consolidation	A waterfall chart showing distinct system suppliers, enriched suppliers, and global ultimate suppliers, along with the net change in supplier numbers after enrichment.

Match Confirmed Tab

The **Match Confirmed** tab of the **Supplier Enrichment Overview** dashboard shows the details of the suppliers that have confirmed matches in the D&B database.

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Supplier Enrichment Overview

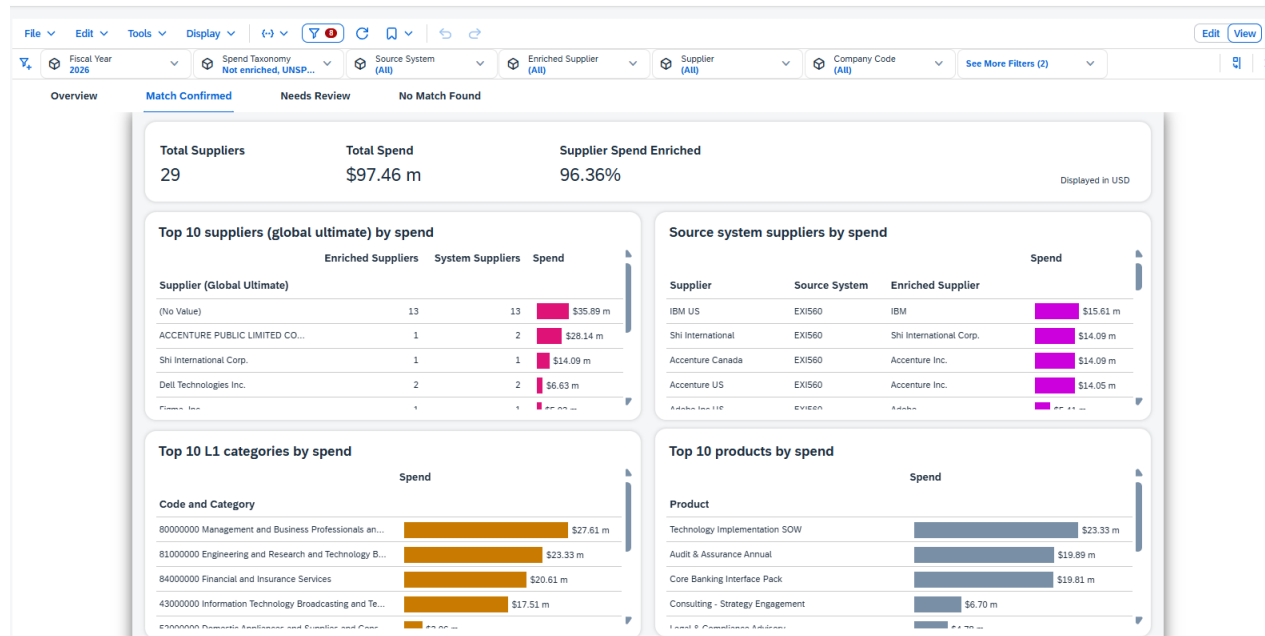


Figure 12: Supplier Enrichment Overview Dashboard: Match Confirmed Tab

Key Performance Indicators (KPIs)

On the **Match Confirmed** tab, the following KPIs summarize the data for the 12-month period in the fiscal year:

Key Performance Indicator	Description
Total Suppliers	Number of unique suppliers
Total Spend	Total spend for the suppliers

Key Performance Indicator	Description
Supplier Spend Enriched	Percentage of spend for which the supplier has a confirmed match in the D&B database
Displayed in <Currency>	Label showing the display currency in use

→ Remember

The currently selected filters affect all KPI values.

Widgets

The **Match Confirmed** tab has the following widgets:

Widget	Description
Top 10 suppliers (global ultimate) by spend	A column chart showing the top 10 suppliers (global ultimate) by spend, along with the number of enriched suppliers and the number of system suppliers associated with each global ultimate supplier.
Source system suppliers by spend	A column chart showing the distinct source system suppliers and the corresponding enriched suppliers by spend.
Top 10 L1 categories by spend	A column chart showing the top 10 L1 categories by spend.
Top 10 products by spend	A column chart showing top 10 products by spend.

Needs Review Tab

The **Needs Review** tab of the **Supplier Enrichment Overview** dashboard shows the details of those suppliers for which the system found a potential match in the D&B database, but the match is not confirmed with high confidence and needs to be reviewed in the supplier feedback tool.

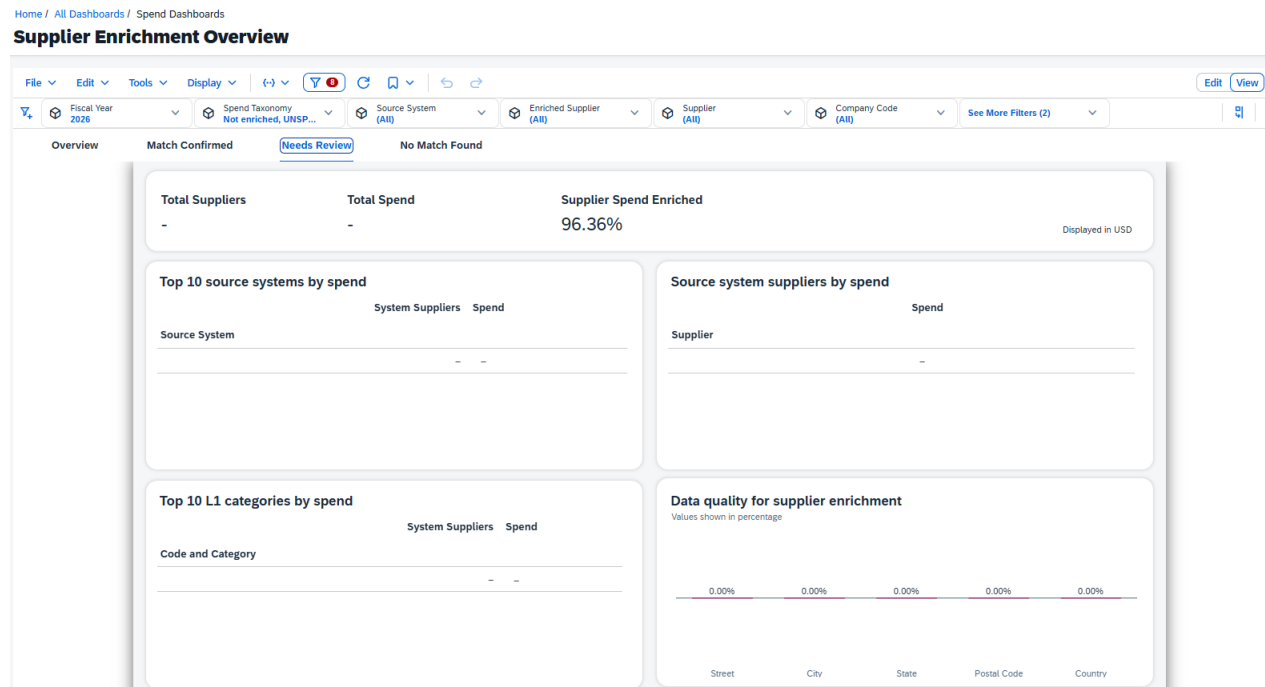


Figure 13: Supplier Enrichment Overview Dashboard: Needs Review Tab

Key Performance Indicators (KPIs)

On the **Needs Review** tab, the following KPIs summarize the data for the 12-month period in the fiscal year:

Key Performance Indicator	Description
Total Suppliers	Number of unique suppliers.
Total Spend	Total spend for the suppliers.
Supplier Spend Enriched	Percentage of spend for which the supplier has a confirmed match in the D&B database.
Displayed in <Currency>	Label showing the display currency in use.

→ Remember

The currently selected filters affect all KPI values.

Widgets

The **Needs Review** tab has the following widgets:

Widget	Description
Top 10 source systems by spend	A column chart showing the top 10 source systems by spend.
Source system suppliers by spend	A column chart showing distinct source system suppliers by spend and the count of system suppliers grouped by source system.
Top 10 L1 categories by spend	A column chart showing the top 10 L1 categories by spend.
Data quality for supplier enrichment	A bar chart showing data quality for supplier enrichment.

No Match Found Tab

The **No Match Found** tab of the **Supplier Enrichment Overview** dashboard shows the details of those suppliers that could not be matched to any record in the D&B database.

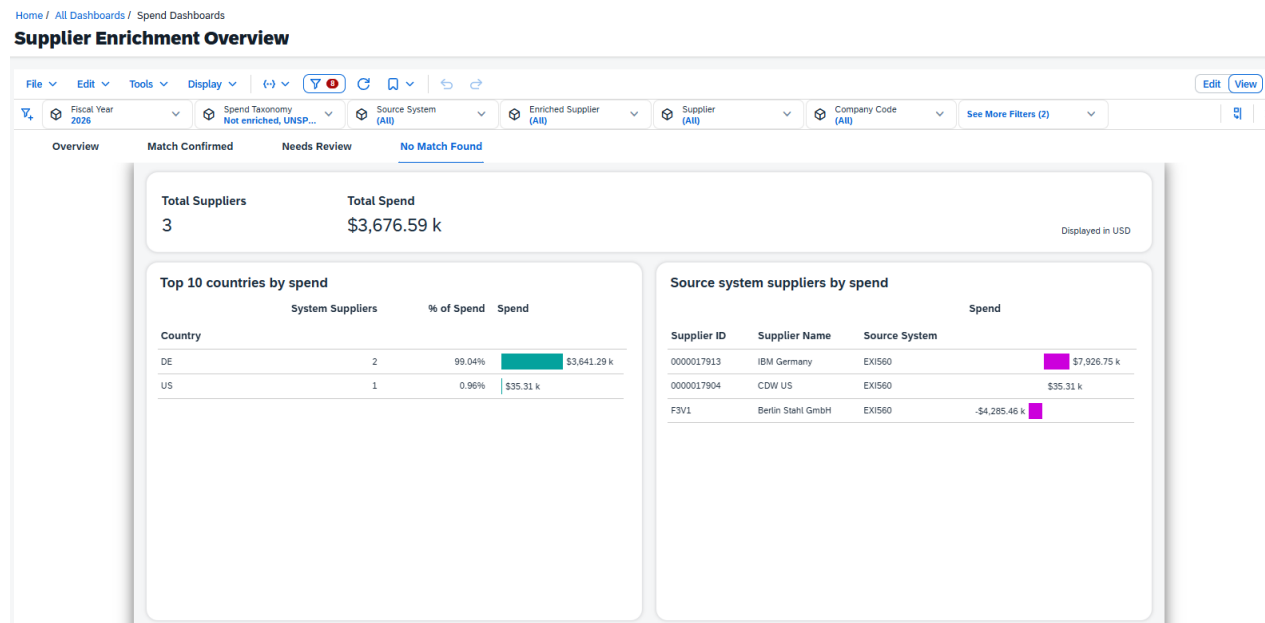


Figure 14: Supplier Enrichment Overview Dashboard: No Match Found Tab

Key Performance Indicators (KPIs)

On the **No Match Found** tab, the following KPIs summarize the data for the 12-month period in the fiscal year:

Key Performance Indicator	Description
Total Suppliers	Number of unique suppliers
Total Spend	Total spend for the suppliers

Key Performance Indicator	Description
Displayed in <Currency>	Label showing the display currency in use

→ Remember

The currently selected filters affect all KPI values.

Widgets

The **No Match Found** tab has the following widgets:

Widget	Description
Top 10 countries by spend	A column chart showing the top 10 countries where suppliers with no D&B match are located.
Source system suppliers by spend	A column chart showing the source systems from which the unmatched supplier records were sourced.

Spend Overview — Summary and Compliance Dashboard

The **Spend Overview — Summary and Compliance** dashboard shows a summary of spend and compliance for your organization over the last 12-month period.

The **Spend Overview — Summary and Compliance** dashboard is the most comprehensive dashboard based upon classified invoices and enriched suppliers. The dashboard is used by business users for multi-dimensional analysis.

Business users can filter to any taxonomy (UNSPSC or custom) and find the spend by top categories, suppliers, and regions. The dashboard also provides a filtered view of off-contract spend as well as off-PO spend.

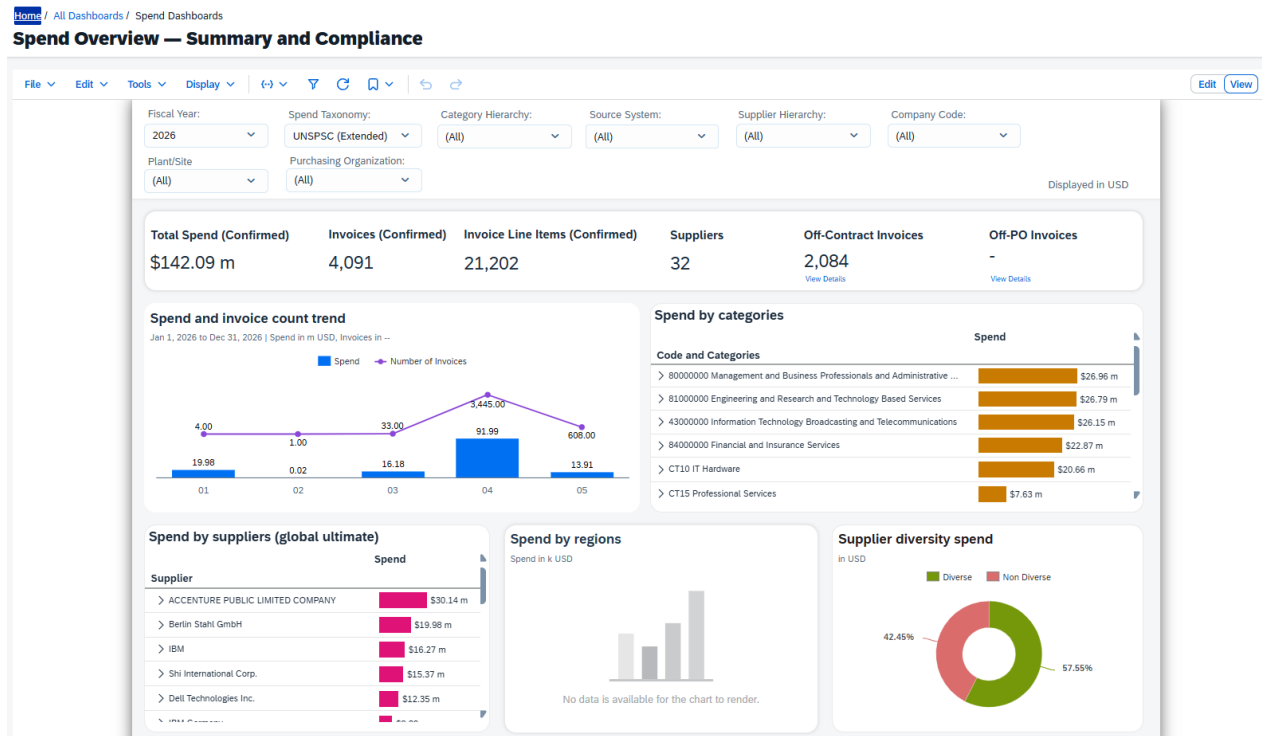


Figure 15: Spend Overview — Summary and Compliance Dashboard

By default, you can filter the data by the following dimensions:

- Fiscal Year
- Spend Taxonomy
- Category Hierarchy
- Source System
- Supplier Hierarchy
- Company Code
- Plant/Site
- Purchasing Organization

Key Performance Indicators (KPIs)

Key performance indicators for the last 12 months appear in a ribbon at the top of the dashboard. The bottom value for each KPI is the variance from the previous 12-month period. All KPI values are affected by the currently selected filters.

Key Performance Indicator	Description
Total Spend (Confirmed)	Sum of the amount of vendor paid transactions from general ledger postings in reporting currency.
Invoices (Confirmed)	Number of unique invoices related to the total spend amount.
Invoice Line Items (Confirmed)	Number of purchase orders referenced in the invoices.

Key Performance Indicator	Description
Suppliers	Number of unique source system suppliers processed.
Off-Contract Invoices	Number of unique off-contract invoices processed.
Off-PO Invoices	Number of unique off-PO invoices processed.

Widgets

The **Spend Overview — Summary and Compliance** dashboard has the following widgets:

Widget	Description
Spend and invoice count trend	A trend line chart showing invoice count and a column chart showing invoice spend and year-over-year variance.
Spend by categories	A column chart showing the top categories based on the spend taxonomy selected in the dashboard (UNSPSC or custom, as defined in the application). The categories are organized as a hierarchy.
Spend by suppliers (global ultimate)	A column chart showing the global ultimate suppliers by spend. The supplier hierarchy can be drilled down to show enriched suppliers (level 2) and source system suppliers (level 3).
Spend by regions	A column chart showing the distribution of spend based on the geography hierarchy. The top level is global regions as defined in the application, which can be drilled down to countries (level 2) and plants (level 3).
Supplier diversity spend	A donut chart comparing spend on diverse and nondiverse suppliers. A diverse supplier is a business that is majority owned and operated by an individual or group that is part of a traditionally underrepresented or underserved group.

Note

The source of diversity data for suppliers is SAP Ariba Spend Analysis diversity data.

Diversity Overview Dashboard

The **Diversity Overview** dashboard provides a summary of spend information based on the diversity classification of your suppliers.

A diverse supplier is a business that is majority owned and operated by an individual or group that is part of a traditionally underrepresented or underserved group.

You can use the **Diversity Overview** dashboard for multi-dimensional analysis.

You can filter by any taxonomy (UNSPSC or custom) and find the diversity spend by diversity types, categories, plants/sites, and enriched suppliers. The dashboard also provides a filtered view of enriched suppliers by their diversity certification status.

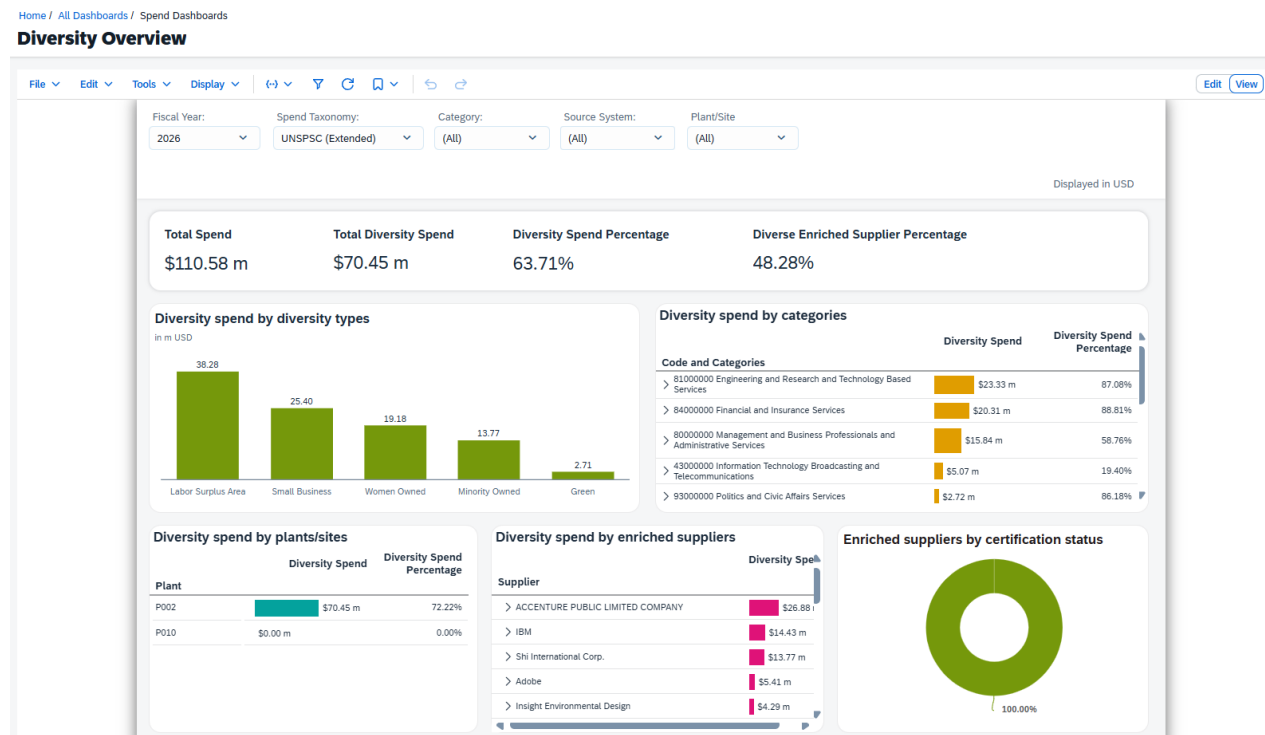


Figure 16: Diversity Overview Dashboard

By default, you can filter the data by the following dimensions:

- Fiscal Year
- Spend Taxonomy
- Category
- Source System
- Plant/Site

Key Performance Indicators (KPIs)

Key performance indicators for the last 12 months appear in a ribbon at the top of the dashboard. The bottom value for each KPI is the variance from the previous 12-month period.

Key Performance Indicator	Description
Total Spend	Sum of vendor-related transactions from general ledger postings in reporting currency.
Total Diversity Spend	Total spend based on diversity.
Diversity Spend Percentage	Percentage of the total diversity spend in the total spend.

Key Performance Indicator	Description
Diverse Enriched Supplier Percentage	Percentage of enriched suppliers that are classified as diverse, out of all enriched suppliers with a confirmed D&B match.

→ Remember

The currently selected filters affect all KPI values.

Widgets

The **Diversity Overview** dashboard has the following widgets:

Widget	Description
Diversity spend by diversity types	A bar chart showing diversity spend by diversity type.
Diversity spend by categories	A column chart showing top purchasing categories by diversity spend.
Diversity spend by plants/sites	A column chart showing plants/sites by diversity spend.
Diversity spend by enriched suppliers	A column chart showing enriched suppliers by diversity spend.
Enriched suppliers by certification status	A donut chart comparing enriched suppliers by their diversity certification status.

Spend Assessment – Payment Terms Dashboard

The **Spend Assessment – Payment Terms** dashboard provides insights into the distribution of payment terms across suppliers and categories, and helps you identify opportunities to improve or consolidate terms.

This dashboard shows how your organization applies payment terms across categories and suppliers. Use it to find inconsistent payment terms and ones to renegotiate to improve cash flow and discount utilization.

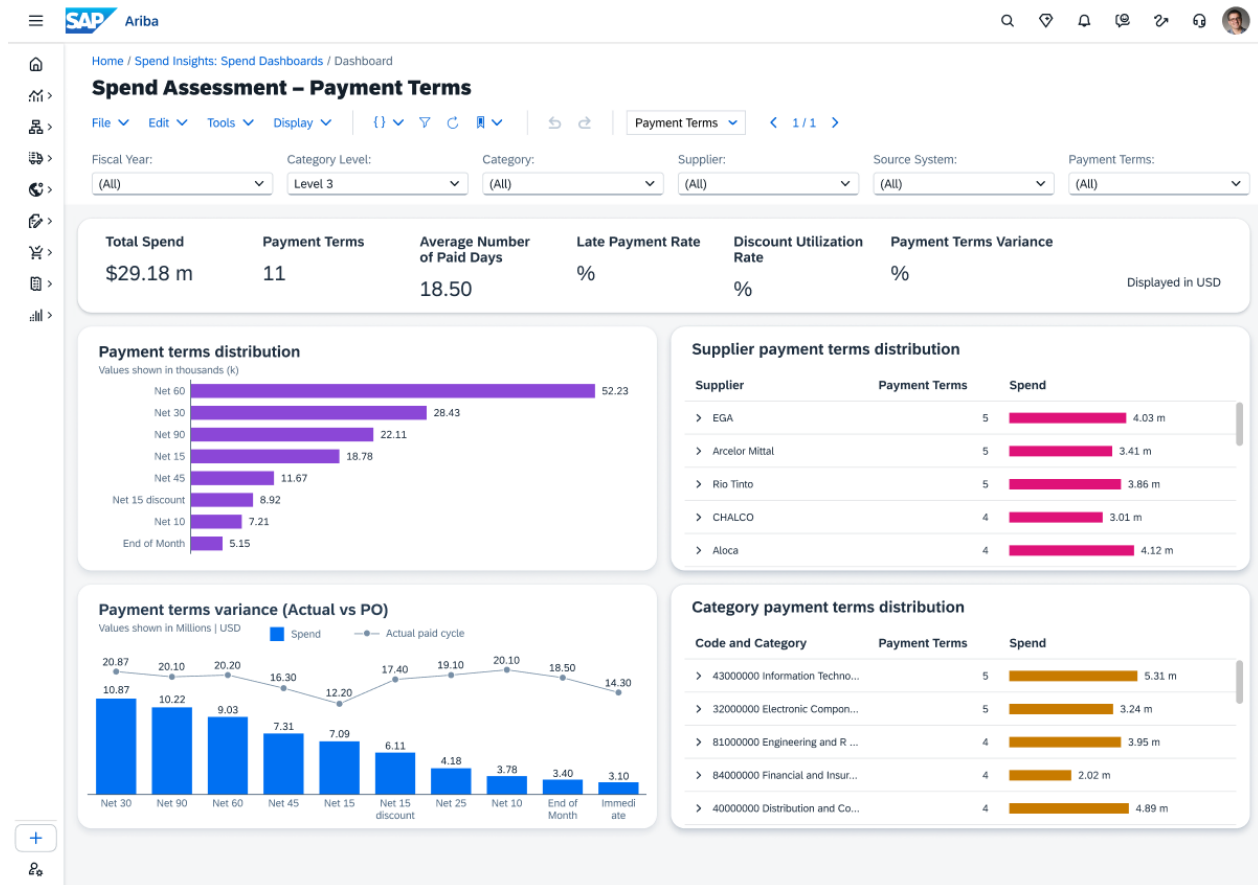


Figure 17: Spend Assessment – Payment Terms Dashboard

By default, you can filter the data by the following dimensions:

- Fiscal Year
- Category Level
- Category
- Supplier
- Source System
- Payment Terms

Key Performance Indicators (KPIs)

Key performance indicators appear in a ribbon at the top of the dashboard.

Key Performance Indicator	Description
Total Spend	The total invoiced spend within the selected filter criteria.
Payment Terms	The total number of distinct payment terms in use.
Average Number of Paid Days	The average number of days taken to pay invoices (days from invoice creation to settlement).

Key Performance Indicator	Description
Late Payment Rate	The percentage of invoices paid after the agreed payment term (posting date is later than net due date).
Discount Utilization Rate	The percentage of available early payment discounts that were used (invoices where cash discounts were applied).
Payment Terms Variance	The variance between the agreed payment terms and the actual payment behavior. This variance is the percentage of invoices where the payment posting date is different than the agreed payment due date, which indicates whether payments were made too early or too late.

📘 Note

The currently selected filters affect all KPI values and widgets on the dashboard. Selecting a payment term in one widget updates all other widgets to reflect that selection.

Widgets

The **Spend Assessment – Payment Terms** dashboard has the following widgets:

Widget	Description
Payment terms distribution	A chart that shows the number of payment terms used in invoices (for example, Net 30, Net 60, Net 90). It can help you understand the different payment terms and conditions used, and to identify long-tail spend.
Supplier payment terms distribution	A chart that shows the count of distinct payment terms for each supplier, useful for identifying suppliers that use too many terms.
Payment terms variance (Actual vs PO)	A combination chart comparing agreed payment terms and the actual paid cycle per payment term. The actual paid cycle is calculated using the invoice clearing date and posting date.
Category payment terms distribution	A chart showing spend categories with the number of distinct payment terms in use and their associated spend, which enables you to harmonize payment terms within a category.

📘 Note

Spend records that have no payment term assigned display as *Not Specified*.

Tail Spend Dashboard

The **Tail Spend** dashboard provides insights into your organization's low-value, high-volume transactions to help you identify opportunities to reduce tail spend based on suppliers and categories.

The **Tail Spend** dashboard shows spend distributed across many suppliers with low-value invoices. Use this dashboard to identify which supplier and category combinations drive the most tail spend, and take action to consolidate suppliers and reduce transaction volume.

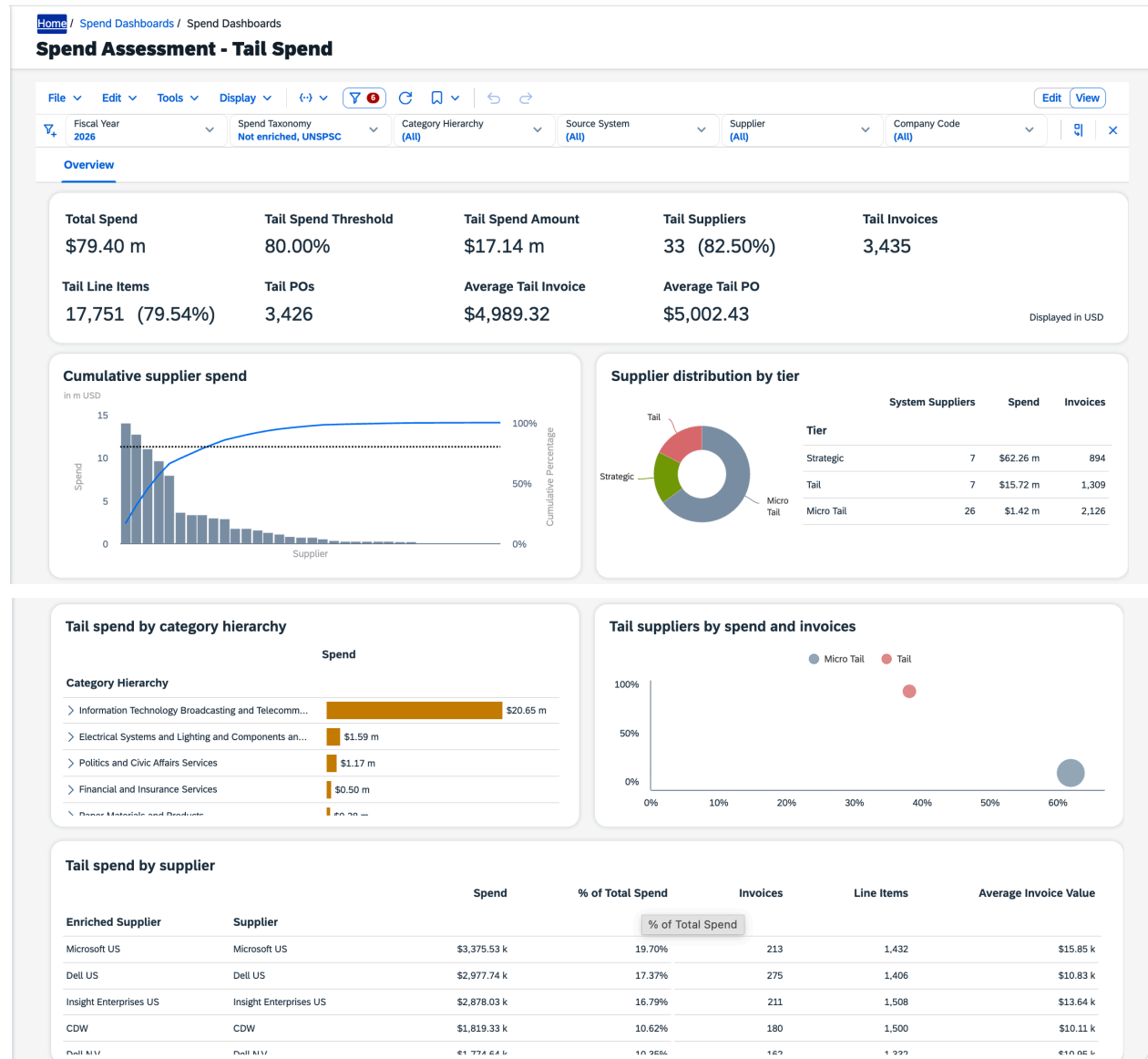


Figure 18: Tail Spend Dashboard

By default, you can filter the data by the following dimensions:

- **Fiscal Year**
- **Spend Taxonomy**
- **Category Hierarchy**

- Source System
- Supplier
- Company Code

Key Performance Indicators (KPIs)

Key performance indicators appear in a ribbon at the top of the dashboard.

Key Performance Indicator	Description
Total Spend	The total invoiced spend within the selected filter criteria.
Tail Suppliers	The number of suppliers classified as tail spend based on their low spend share and high invoice volume.
Tail Invoices	The number of invoices that contain tail spend. These are supplier invoices in the bottom 20% of supplier spend.
Tail Line items	The number of line items in tail invoices.
Tail POs	The number of tail purchase orders. These are POs related to the invoices in the bottom 20% of supplier spend.
Average Tail Invoice	The average value of tail invoices.
Average Tail PO	The average value of tail purchase orders.

Note

The currently selected filters affect all KPI values and widgets on the dashboard.

Widgets

The **Tail Spend** dashboard has the following widgets:

Widget	Description
Cumulative supplier spend	A Pareto chart with the cumulative spend for source system suppliers (from high to low) on the Y axis, and cumulative supplier count on the X axis.
Suppliers distribution by tier	A donut chart showing strategic versus tail suppliers for the top 80% of spend and supplier count for the bottom 20% of spend.
Tail spend by category hierarchy	A top 10 bar chart showing category hierarchy with tail spend. It includes only invoices belonging to the tail suppliers.

Widget	Description
Tail suppliers by spend and invoices	A bubble chart showing spend value by transaction volume for tail suppliers, with invoice count on the x axis, spend value on the y axis, and bubble size for supplier count.

Creating Dashboards

You can create new dashboards to display analysis specific to your organization. You can also share new dashboards with colleagues.

Create a new dashboard if you want to analyze spend information that isn't displayed in one of the predefined dashboards. Any user who can view dashboards can also create new dashboards.

SAP Analytics Cloud

The dashboard builder is based on SAP Analytics Cloud, a flexible solution that enables you to graphically assemble disparate data into cohesive, informative stories.

The instructions below describe how to use the dashboard builder at a rudimentary level. To learn about all available features, refer to the SAP Analytics Cloud [documentation](#).

The basic steps for creating dashboards are:

[Step 1: Start the Dashboard Builder and Select a Data Source \[page 56\]](#)

[Step 2: Add Widgets to the Dashboard \[page 58\]](#)

[Step 3: View, Save, and Share the Dashboard \[page 59\]](#)

Step 1: Start the Dashboard Builder and Select a Data Source

When you start a new dashboard, you specify a data source, which is the data model to use for analysis.

1. From the Ariba launchpad, choose **Spend Insights**.
2. Choose **Spend Dashboards**.
3. Choose **Create**.

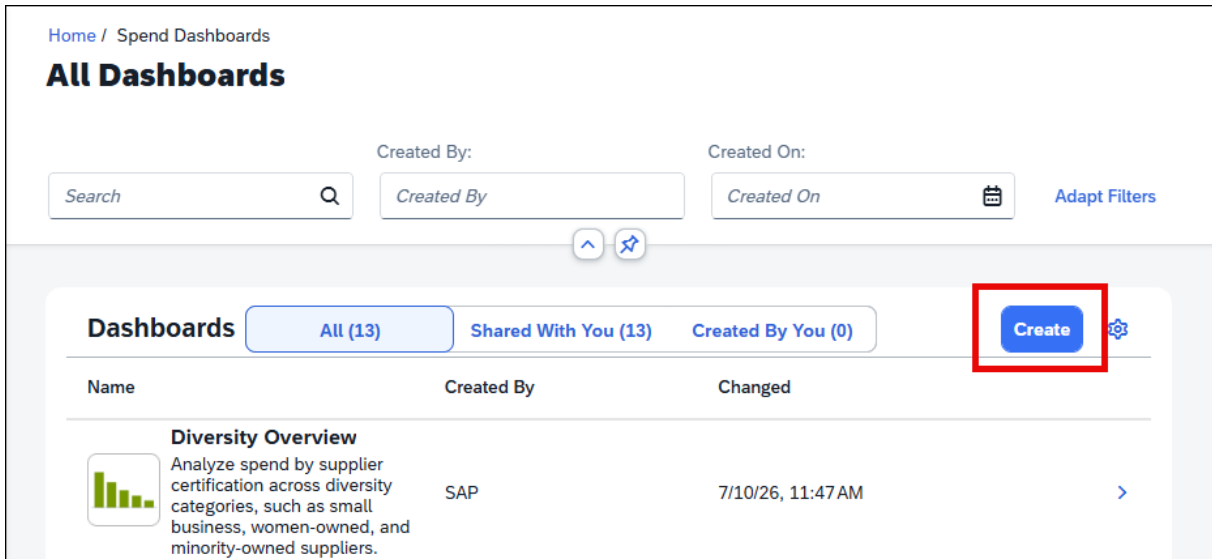


Figure 19: Create Dashboard button

4. In the **Select a Calculation View** window, choose the entry field.
The **Select a Data Source** window display. Choose an analytical data model, which is the published data made available for analysis.

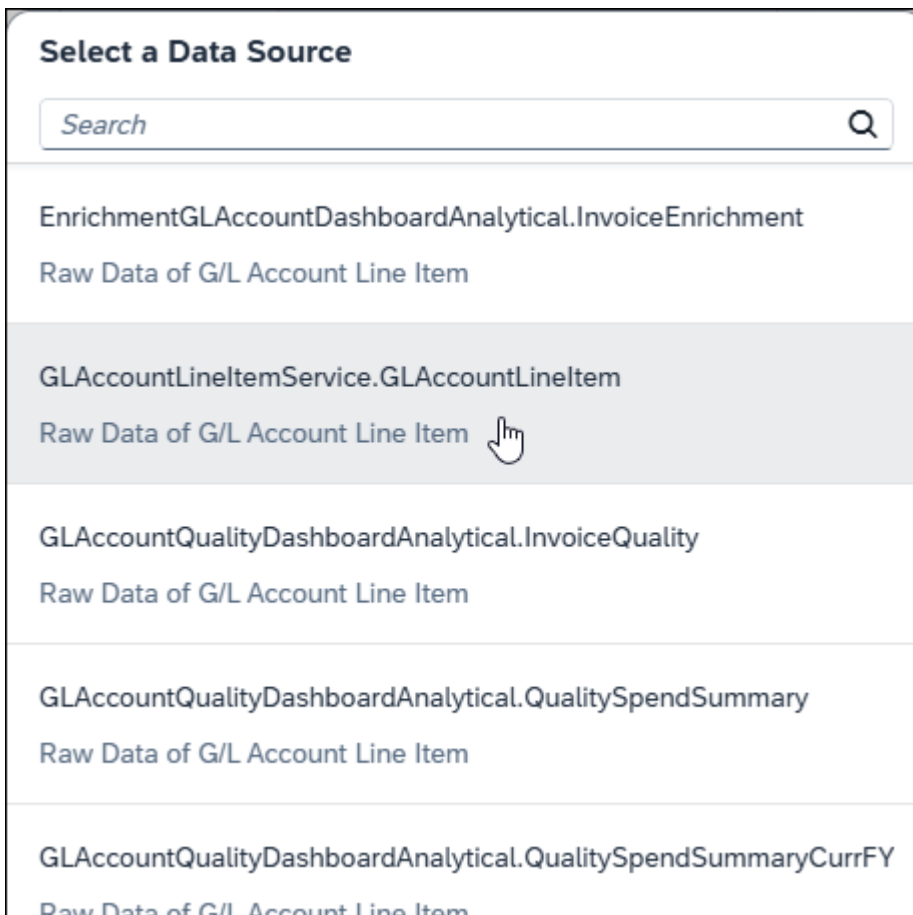


Figure 20: Select a Data Source

The data sources available to you will be different, depending on your configuration.

Click **OK** to confirm your choice in the **Select a Calculation View** window.

Step 2: Add Widgets to the Dashboard

After selecting a data source, begin designing the layout of the new dashboard by adding widgets.

When you add a widget, you select a **measure**, which is a quantitative value, such as **PO Count** or **Spend**, and a **dimension**, which qualifies the data, such as **Cost Center** or **Fiscal Year**.

1. In the left panel, select the **Assets** tab and find a widget, such as **Chart**. Drag the widget right and drop it on the canvas.

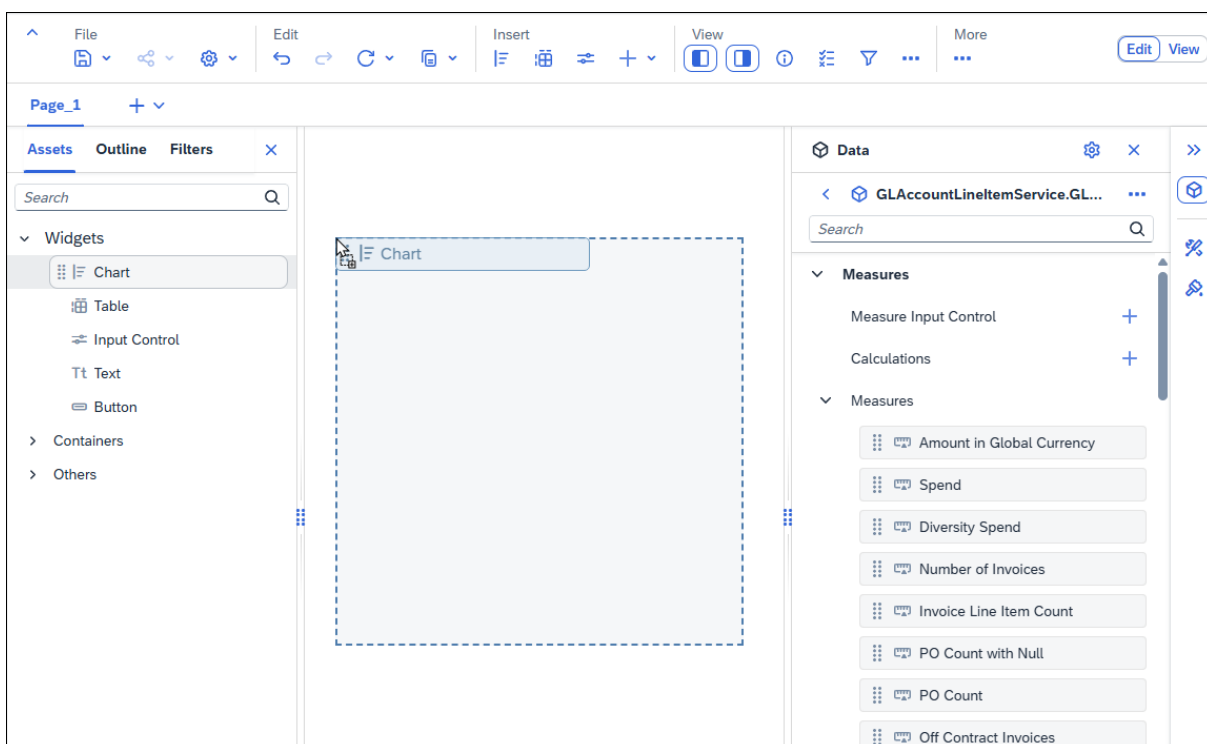


Figure 21: Adding Chart Widget

2. In the **Data** panel, under **Measure**, find data to analyze, such as **Spend**. Drag the measure left and drop it in the **Measures** area in the widget.

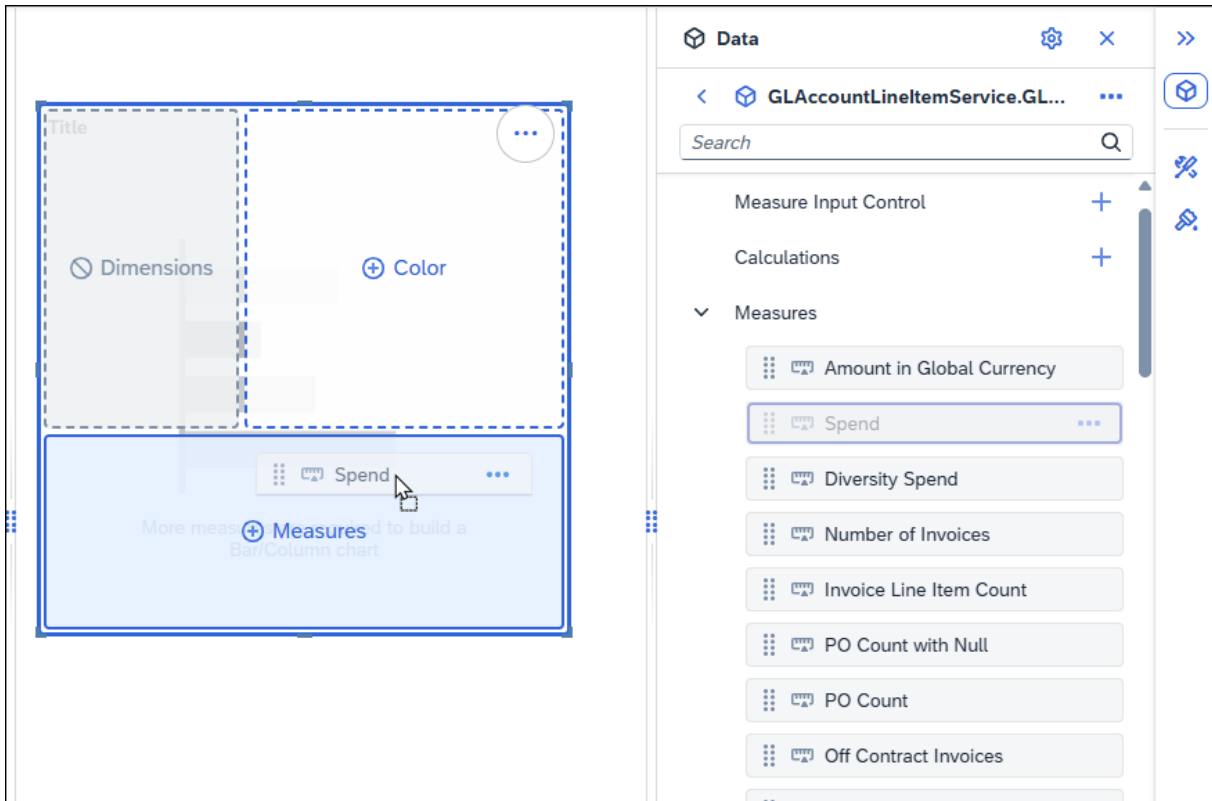


Figure 22: Adding Spend to the Widget

3. In the **Data** panel, under **Dimensions**, find a data dimension, such as **Fiscal Year**. Drag the dimension left and drop it in the **Dimensions** area in the widget.
Widgets prevent you from dropping measures or dimensions in the wrong area.
4. Optionally, change the format and aesthetics of the widget by using controls in the **Builder** and **Styling** tabs in the right panel.
5. Add additional widgets to the dashboard to build a complete analytical story.

Step 3: View, Save, and Share the Dashboard

View the dashboard to review it, then save it. You can optionally share it with colleagues.

1. In the upper right, click **View** to display the dashboard as users would display it.
View mode removes editing controls and renders the dashboard normally.
2. Review the dashboard and ensure the widgets show the desired data. To make changes, choose **Edit** and change the widgets.
3. After you're done editing, choose **File > Save**.
In the **Save Story** window, name the dashboard and choose **Save**.
4. Optionally, share the dashboard with colleagues by choosing **File > Share**.
You can share a dashboard only after you save it.

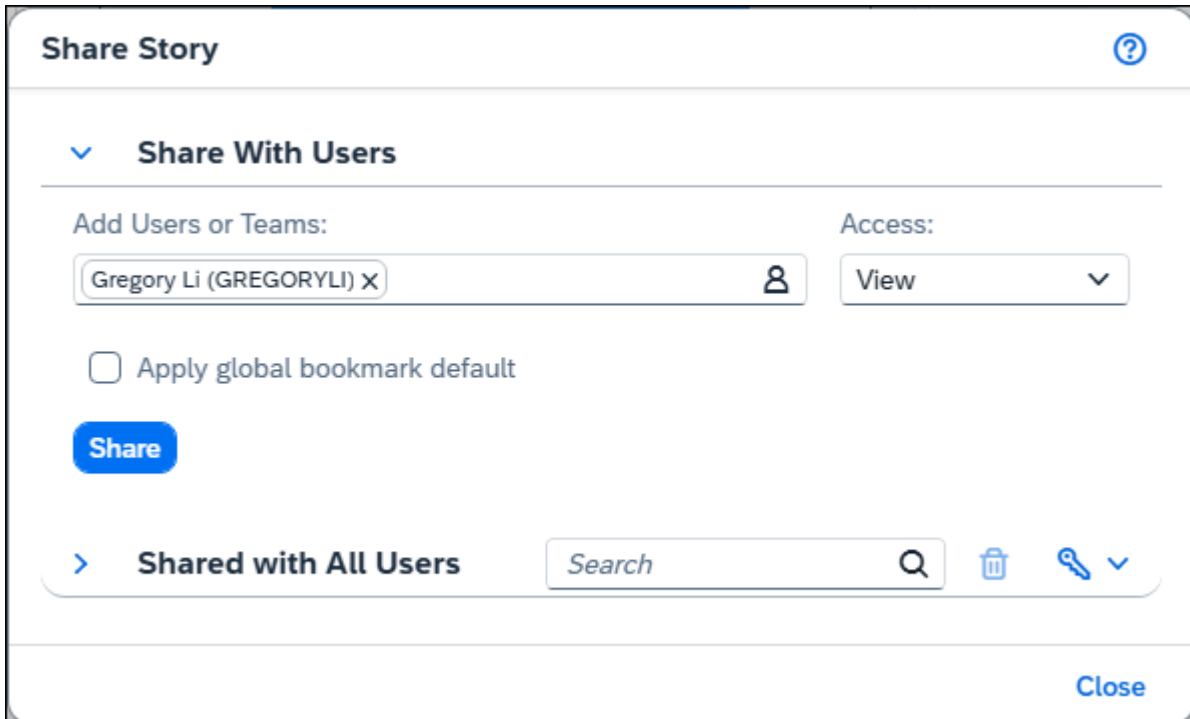


Figure 23: Share Story

5. Select users and their access permission. By default **View** only access is selected. Choose **Share** then choose **Close**.

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