

CIO INCIGHT® USER GUIDE

VERSION 4.2 NOVEMBER, 2024

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GETTING STARTED

This document describes the fields, filters, and navigation of the **InCight Dashboards** (CIO Nexus™, CIO Analyzer™ and CIO Visualizer™) and provides the definition of each TBM category to which spend data reported to CXO Nexus™ is assigned, using its proprietary AI processing technology.

FILTERS

On the right-hand side of your Nexus and Analyzer Modules you will see a list of filters that can be used to sort and search your data. Within these filters you can sort by Transaction Type, Spend Type, Invoice Date, CXO Category, Parent Manufacturer, Supplier Normalized Name and Invoice Submitter.

Filters

Transaction Type

invoice

Spend Type

IT

Invoice Date

All

CXO Category

All

Parent Manufacturer

All

Supplier Normalized Name

All










Invoice Submitter

All

INCIGHT ANALYZER

InCight Analyzer™ is your default landing page which will load when you log-in to your CXO Nexus™, CIO InCight instance. Your Analyzer page gives you a granular view of your data. Within Analyzer, you can drill down into different cost savings views. You can download data directly into Excel from any of your Analyzer modules.










-  **TruSpend Dashboard**- This module provides a snapshot of key metrics provided by CXO InCight.
-  **Parent Manufacturer TruSpend**- This module provides you the ability to drill down into your Parent Manufacturer data to look at Total Spend by Customer Original Supplier, Parent Manufacturer and Parent Manufacturer sold through Resellers.
-  **TruSpend vs AP**-This module allows you to have a side-by-side view of your TruSpend by Parent Manufacturer as well as your Accounts Payable spend.
-  **Reseller TruSpend Tab**- This module illustrates your Top Technology spend by Parent Manufacturer as well as gives you a view of your Top Tech Resellers and Top Parent Manufacturers sold through Resellers. This module also gives you a visual on the distribution of direct versus reseller spend.
-  **CXO Category TruSpend**- This module will give you a high-level overview of total spend by CXO Category and gives you the ability to drill down into each CXO Category and see spend by Parent Manufacturer, Supplier Normalized Name and Cost Center.
-  **TruSpend by Year**- This module gives you the ability to see Total Technology Spend by Parent Manufacturer year over year and drill down by CXO Category, Parent Manufacturer, Supplier Normalized Name and Cost Center.
-  **TruSpend Product Query**- This module allows for you to see Total Technology Spend by product. You can drill down by Parent Manufacturer to see individual product spend details. Additionally, you can see visuals of Original Equipment Manufacturer distribution and Supplier Composition broken down by Supplier Normalized Name.
-  **Cost Center TruSpend**- This module gives a view of your spend trends by Cost Center and allows you to drill down into each Cost Center to see more granular spend details.
-  **TruSpend Data Export**- This module allows you to download up to 150,000 lines of data directly from your Analyzer tab. If you need additional rows of data, please proceed to Export Data.

INCIGHT NEXUS

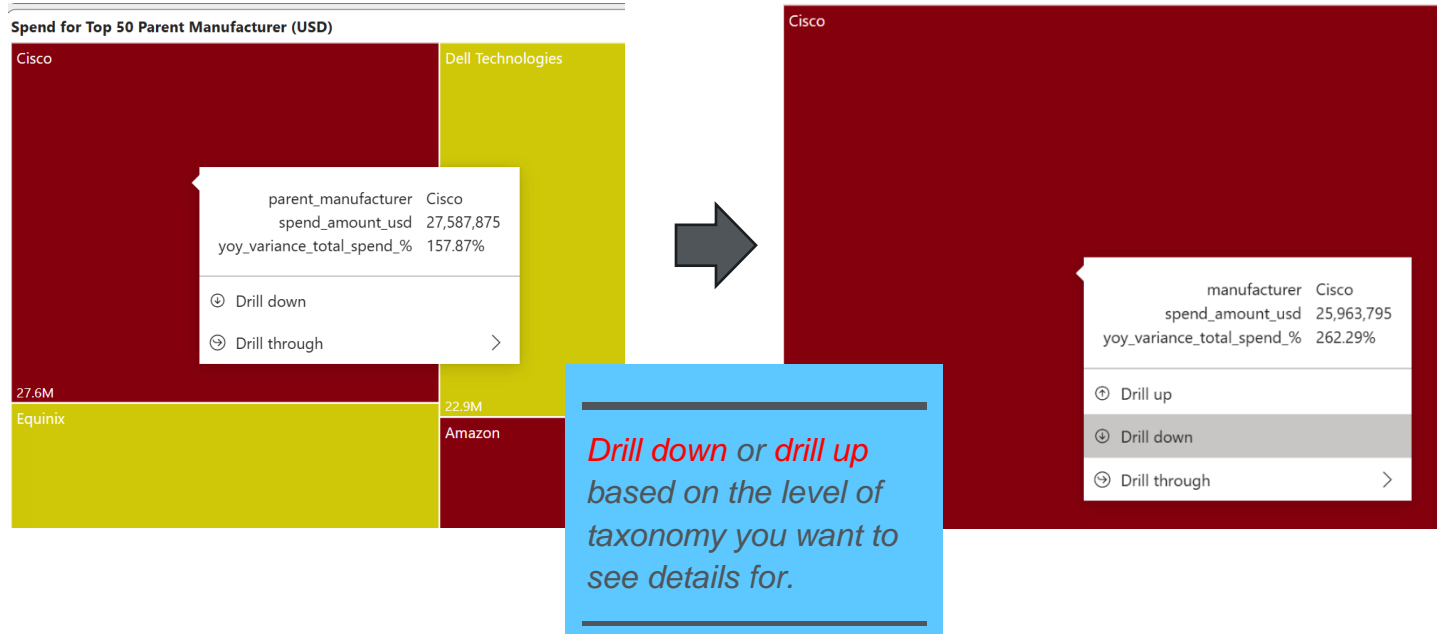
InCight Nexus™ give you a high-level overview of your Direct and Reseller spend. You can choose from the left-hand Page Navigator to see different TruSpend views. In many of you spend category modules you will be able to see both a profile view and a spend detail view.



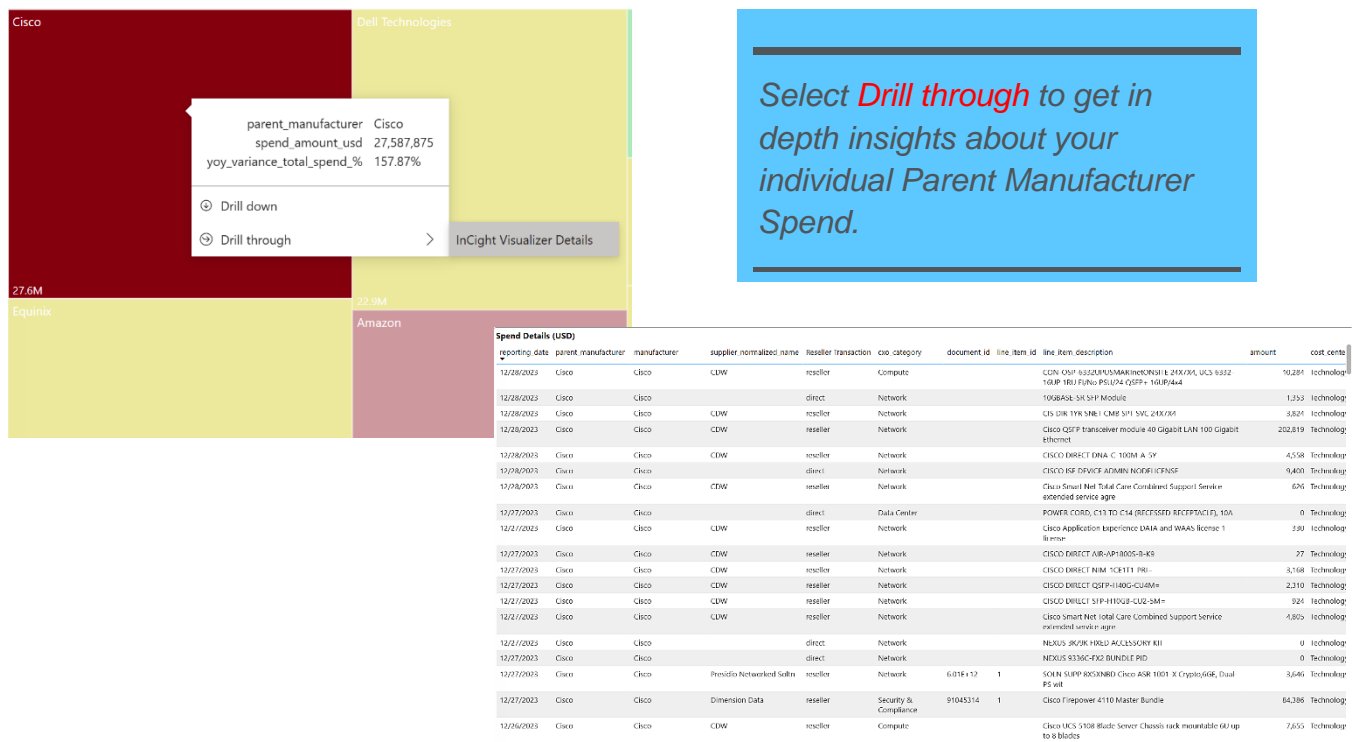
-  **Dashboard TruSpend**- Top spend view for your Parent Manufacturers and Suppliers as well as overall spend trends across past years via cost centers and CXO Categories
-  **Parent Manufacturer TruSpend**- This panel depicts the total Parent Manufacturer spend reported to CXO Nexus. The Parent Manufacturer tab gives you a view of each Parent Manufacturer profile and allows you to see spend trends, spend by Supplier Normalized Name, CXO Category and Spend by Cost Center.
-  **Reseller TruSpend**- This module illustrates the overall spend trends of each Reseller and allows you to see your spend trends broken out by Parent Manufacturer, CXO Category and Cost Center.
-  **CXO Category TruSpend**- This tab categorizes all product spend into the Technology Business Management Hierarchy (TBM). This is done by CXO Nexus' proprietary AI process.
 - This is a standard taxonomy to describe cost sources, technologies, IT resources (IT towers), applications, and services to promote alignment between IT, Finance, and Business Unit leaders. TBM taxonomy provides a generally accepted way of categorizing and reporting IT costs and other metrics. The standard [TBM Classifications](#) include Application, Compute, Data Center, Storage, IT Management, Network, Security & Compliance, Platform, Output, and Communication.
-  **Cost Center TruSpend**- This module allows for understanding vendor spend by business unit and cost center segmentation.
-  **Variance TruSpend**- This module gives you a year over year spend trend for your Parent Manufacturers.
-  **Top TruSpend**- This module gives you top spend comparisons for your Parent Manufacturers.

DRILL DOWN OPPORTUNITIES

Click on any Parent Manufacturer and select “Drill Down” or “Drill Through” to gain additional insights into your Parent Manufacturer Spend details.



DRILL THROUGH OPPORTUNITIES



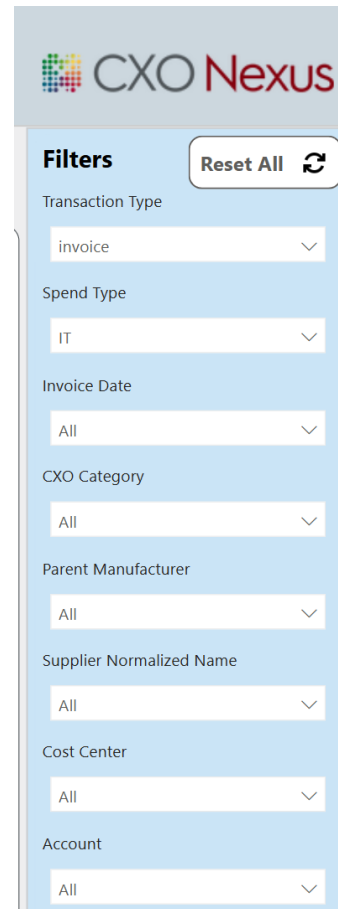
SPEND TREND LEGEND

The size of each box is relative to the total spend at the level displayed. The color map allows you to see spend trends at a glance, organized by color with the key located on the upper right of the Vizualizer screen.

Spend Trend Legend		Very Large Increase (>100%)		Large Increase (50% to 100%)		Increase (0% to 50%)
		Decrease (-50% to 0%)		Large Decrease (<-50%)		No Value

DATA SOURCE

Use the Filters on the right-hand side of the Visualizer screen to determine Transaction type, Spend Type, Invoice Date, CXO Category, Parent Manufacturer, Supplier Normalized Name, Cost Center and Account.








The screenshot shows the CXO Nexus Filters panel on the right-hand side of the Visualizer screen. The panel has a light blue header with the CXO Nexus logo and a 'Reset All' button with a refresh icon. Below the header, there are eight filter sections, each with a label and a dropdown menu:

- Transaction Type:** dropdown menu showing 'invoice'.
- Spend Type:** dropdown menu showing 'IT'.
- Invoice Date:** dropdown menu showing 'All'.
- CXO Category:** dropdown menu showing 'All'.
- Parent Manufacturer:** dropdown menu showing 'All'.
- Supplier Normalized Name:** dropdown menu showing 'All'.
- Cost Center:** dropdown menu showing 'All'.
- Account:** dropdown menu showing 'All'.

DIMENSION GROUPING

Dimension – You can use different dimensions to aggregate and explore your spend data in Visualizer.

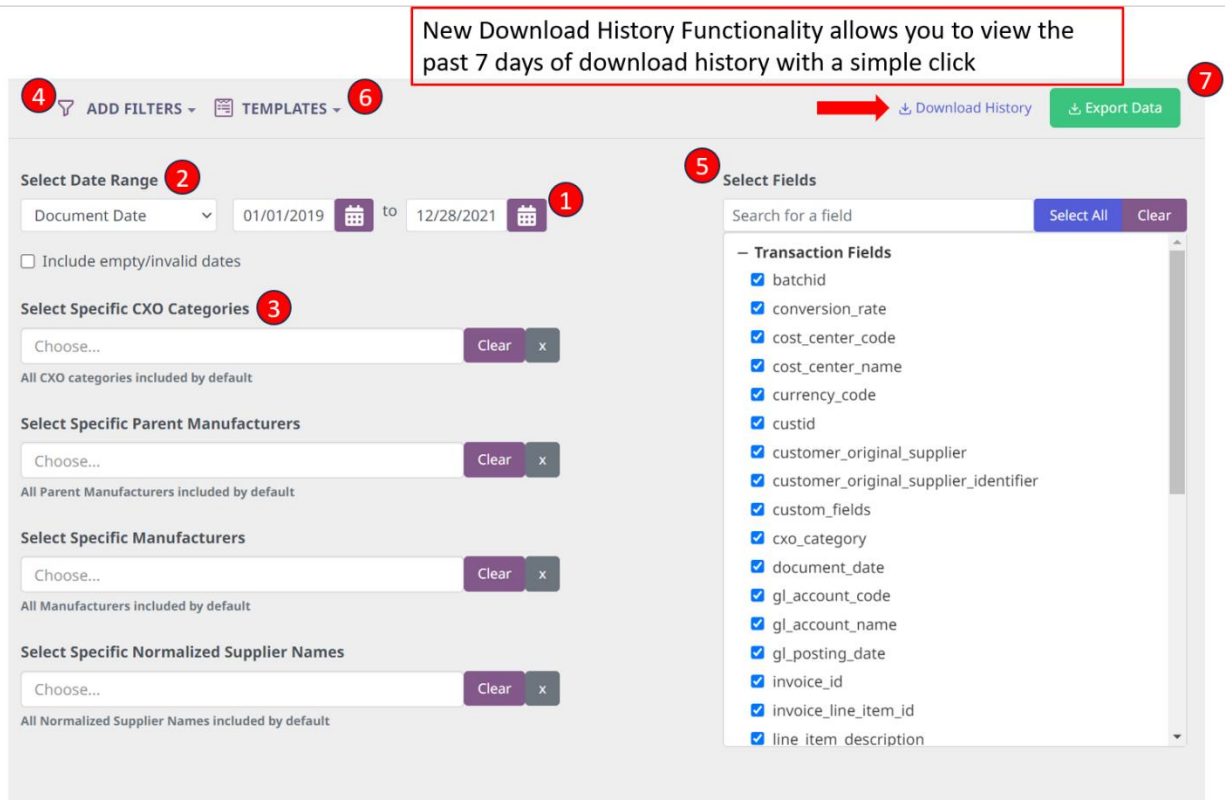
-  **Parent Manufacturer** - The Parent Manufacturer is the entity under which the supplier operates. Selecting Parent Manufacturer for your data grouping will provide you with spend by parent manufacturer across all categories.
-  **Supplier Normalized Name** – The Supplier is the entity which delivers the product to you. Selecting Supplier for your data grouping will provide you with spend by supplier across all categories. CXO Nexus normalizes supplier names.
-  **Cost Center** – CXO Nexus can leverage business hierarchies to roll up technology spend according to your chart of account (cost center, GL account, etc.).
-  **CXO Category**- See a heatmap view of your spend across our CXO categories: we apply AI and machine learning to categorize your spend data categories derived from TBM taxonomy towers: Application, Data, Communication, Compute, IT Management, Network, Data Center, Delivery, End User, Output, Platform, Security & Compliance, and Storage. CXO Nexus has added a “Multi” category which is used when product details are not sufficient to assign a category.
-  **Supplier Metadata**- See spend broken down by supplier business relationship. CXO Nexus can overlay any vendor-based metadata on top your technology spend (risk score, diversity score, etc.), if you can provide the source data.

EXPORT DATA

Export Data - Users can export data on to their desktop using multiple data filters to refine their data request. Downloads larger than 1 Million rows or 6GB, will be divided into 6GB files and will export in sequence as needed.

Access the Export Data Module using the Main Menu on the far-left side of the screen.

New Download History Functionality allows you to view the past 7 days of download history with a simple click



4 ADD FILTERS - 6 TEMPLATES - 7

1 2

Select Date Range

Document Date 01/01/2019 to 12/28/2021

☐ Include empty/invalid dates

3

Select Specific CXO Categories

Choose... Clear x

All CXO categories included by default

Select Specific Parent Manufacturers

Choose... Clear x

All Parent Manufacturers included by default

Select Specific Manufacturers

Choose... Clear x

All Manufacturers included by default

Select Specific Normalized Supplier Names

Choose... Clear x

All Normalized Supplier Names included by default





5

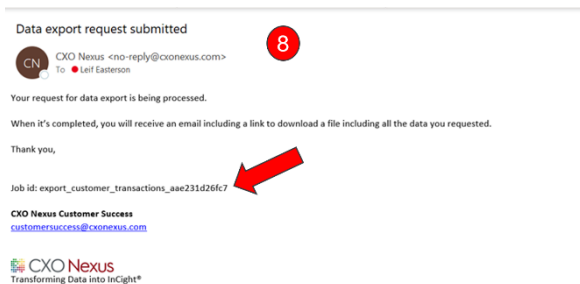
Select Fields

Search for a field Select All Clear

Transaction Fields

- ☒ batchid
- ☒ conversion_rate
- ☒ cost_center_code
- ☒ cost_center_name
- ☒ currency_code
- ☒ custid
- ☒ customer_original_supplier
- ☒ customer_original_supplier_identifier
- ☒ custom_fields
- ☒ cxo_category
- ☒ document_date
- ☒ gl_account_code
- ☒ gl_account_name
- ☒ gl_posting_date
- ☒ invoice_id
- ☒ invoice_line_item_id
- ☒ line item description

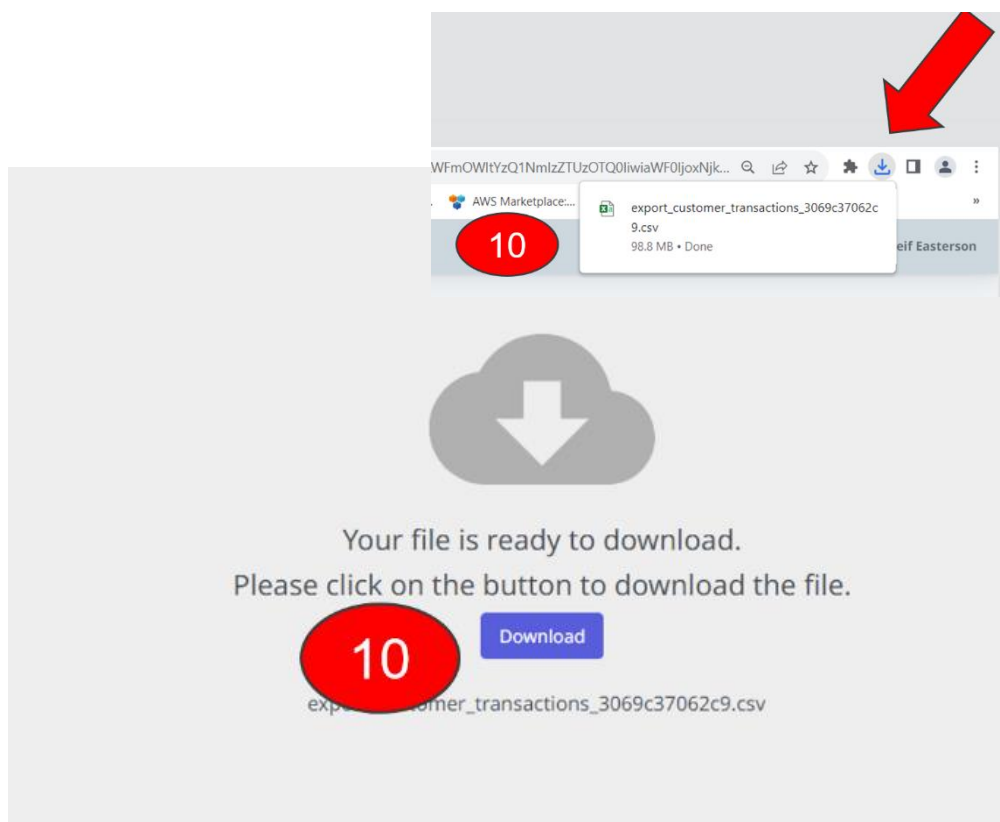
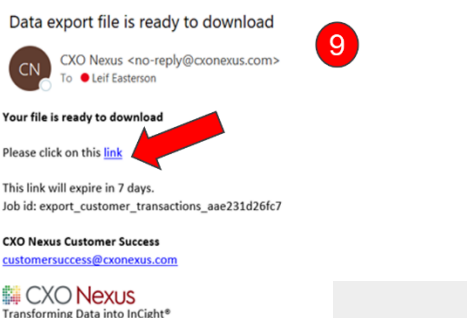
1. Verify the data Timeframe - default is full data set.
2. Verify calendar reference – default is Paid Date, also available are GL Date and Document Date (Invoice Date).
3. Use filters to create the download report parameters - Four filters are displayed:
 -  CXO Category
 -  Parent Manufacturer
 -  Manufacturer
 -  Normalized Supplier Name
4. Additional Filters are available in the “Add Filters” drop down menu – Transaction Type (PO or Invoice) and Batch.
5. All Fields are the default for report content – Users have the option to pick the Fields they require.
6. You can save and retrieve your named download report by clicking on the “Templates” button.
7. To initiate export, click on the green “Export Data” button.



8. An e-mail is sent to confirm the report request. Note the Job number ID for the request (image (8)).

9. A second e-mail is sent when the report is ready for download. Click on the link provided (image (9)).

10. Click on the Download link to download your file. We recommend using Chrome. Other browsers may display the download file in an alternative format.



APPENDIX

TBM 4.0 CLASSIFICATION DEFINITIONS: ANY SPEND NOT IDENTIFIED AS A TBM CLASSIFICATION WILL DISPLAY AS NON-IT

APPLICATION

Development, operations, maintenance & support. Packaged software cost, purchase, lease, subscription Cloud Apps: Public cloud Software-as-a-Service (SaaS)

COMMUNICATION

Voice and data network circuits. Voice and data usage associated with standard telephone calls, 800 number service, mobility and other data transit based on usage billing.

COMPUTE

Linux & Unix: Physical and virtual servers and OS. Includes hardware, software, labor, and support services. Converged Infrastructure /Purpose-built appliances that provide compute, storage, and network capabilities in one box. Traditional mainframe computers and operations running legacy operating systems. Public cloud Infrastructure-as-a-Service (IaaS) compute offerings running any version of Window Server operating system. Infrastructure-as-a-Service (IaaS) compute offerings. Chips: integrated circuits, electronic circuit.

IT MGMT

IT Mgmt & Strategic Planning: IT management and administration resources; including CIO, senior IT leaders and administrative support. IT Finance: Resources involved in the planning, budgeting, spend management system, chargeback of IT expenditures and the costing of IT products and services. Vendor Mgmt: Resources involved in the selection, contract management, oversight, performance management and general delivery of services by 3rd party vendors and external service providers.

NETWORK

Physical and wireless local area network connecting equipment within the core data centers and connecting end users in office working areas to the company's broader networks. Wide area network equipment, labor and support services directly connecting data centers, offices and third parties. Voice resources which enable or distribute voice services through on-premise equipment including PBX, VoIP, voicemail and Other specialized network equipment, infrastructure and services including: contact center, network security, remote access through VPN/RAS, cabling infrastructure and telepresence (video conferencing services) Cloud Network: Public cloud Infrastructure-as-a-Service (IaaS) network offerings providing ingress/egress, load balancing, intra/inter-data center connectivity and resiliency services.

DATA CENTER

Purpose-built data center facilities that house and protect critical IT equipment including the space, power, environment controls, racks, cabling and "smart hand" support. Facilities: Computer rooms and in office working areas to the company's broader networks. MDF/IDF/telco closets that house IT equipment in corporate headquarters, call centers or other general purpose office buildings.

DELIVERY

Project Mgmt: Resources involved with managing and supporting IT-related projects including business and IT-driven initiatives. Client Mgmt: Resources or account managers aligned with the lines of business to understand business needs, communicate IT products, services, and status of IT projects. Ops Center: Centralized IT Operations Center resources including monitoring and intervention e.g., NOC (network operations center), GOC (global operations center). Cloud Ops: Public cloud centralized service management, operations, and monitoring services.

END USER

Workspace: Client compute physical desktops, portable laptops, thin client machines, peripherals and associated software used by individuals to perform work. Mobile Devices: Client compute tablets, smart phones (iOS, Android, Windows Mobile) and apps used by individuals to perform work. Service Desk: Centralized help desk resources which handle user requests, answer questions Field Support: Local support resources which provide on-site support for moves, adds, changes and hands on issue resolution. Cloud Desktop: Public cloud Infrastructure-as-a-Service (IaaS) virtual desktop offerings.

OUTPUT

Central Print: Services often provided to support customer billing or customer documentation support processes. Post Processing: Centralized post print processing support, customer billing or customer documentation support processes Shipping: Costs associated with shipment, mail, or packaging Lens or Imaging: Barcodes, scanning, Optical character recognition (OCR), etc.

PLATFORM

Middleware: Mainframe & Distributed platform, application and system integration resources enabling cross application development, communications, and information sharing. Cloud Platform: Public cloud Platform-as-a-Service (PaaS) application development offerings.

SECURITY & COMPLIANCE

Security Policy: IT Security resources setting policy, establishing process & means, measuring compliance and responding to security breaches. IT Compliance resources setting policy, establishing controls, and measuring compliance to relevant legal and compliance requirements Disaster Recovery: Centralized IT Operations Center resources including monitoring and intervention. Cloud DR:IT resources dedicated to Disaster Recovery including dedicated failover facilities, DR policies and testing.

STORAGE

Storage resources which enable mission critical apps data & services. Storage resources which enable essential but non-mission critical apps data & service. Storage resources used for non-essential, historical, and other information where immediate availability is not required. Online and offline storage resources used for archive, backup & recovery to support data loss, data corruption, disaster recovery and compliance requirements. Cloud Storage: Public cloud Infrastructure-as-a-Service (IaaS) storage offerings supporting normal transactional or other operational applications and system. Cloud Archive: Public cloud Infrastructure-as-a-Service (IaaS) storage offerings for backup and archival purposes.

HELP AND SUPPORT

Email customersuccess@cxonexus.com for any assistance.

Visit our [Knowledge Center](#) to access FAQ answers, help guides, quarterly reports and more.

Hello. How can we help you?



Getting Started

[Video Overview of CXO Nexus Dashboard](#)

[How to do a Secure Data Transfer with CXO Nexus](#)

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FAQ

[Adding New Users and Admin Instructions](#)

[Does CXO Nexus have SOC 2 Accreditation?](#)

[How do I reset or change my password?](#)

[How do I set up my CXO Credentials?](#)

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[Cost Center Clarity - Finding IT Spend in the Business](#)

[Cloud Tru-Incight](#)

[M&A: Fast Track Vendor Optimization](#)

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Release Notes

[December 2022 InCight Nexus Reporting Module Release Notes](#)

[Pluto May 2020 Release Notes](#)

[May 2021 Version release](#)

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