How to Use the Explorer Tool

UC Systemwide Supplier Diversity Application - June 4, 2015
Tool provided by supplier.io
Through an agreement with supplier.io, a minority business enterprise, all UC campus employees can gain access to find small and diverse businesses to meet their procurement needs.

This training session provides the basics on how to maximize your use of the tool.
Getting Access to the Explorer Tool

- Email your campus Supplier Diversity Program Manager at rgerst@berkeley.edu or roesia.gerstein@ucsf.edu to request access.
- You will receive an email inviting you to sign into the supplier.io website with a temporary password. See screenshot example below. This is not spam or a phishing email. Make sure that it does not go to your Spam or Junk folder.

![Roesia Gerstein has created a new Explorer account for you.]

Welcome to the supplier.io Explorer - your definitive source for diverse suppliers! We look forward to having you as part of our community of supplier diversity and sourcing professionals.
Explorer Login

- Once you have received an email with a temporary password, sign into the application using the temporary password
- Then look for your name in the upper right hand corner and open the dropdown menu. Click on Profile to change your password.
Explorer Login (cont’d)

Click “Change password?” checkbox to reset your password
Now you are ready to use the tool.

- Enter the name of a specific company or a keyword.
- In this example we enter “aerospace fabrication” & click on the Search Entire Database button.
Example: Quick View of the Explorer Tool

- “Aerospace fabrication” entered in the search field & the magnifying glass clicked – see item 1
- Filtered for “California” as the STATE from the dropdown – see item 2

This page shows the results with the classification codes to the right.

Note the classification codes for each.
If you scroll farther down on the left navigation bar, you can see the source agencies for the results. The number in parentheses is the number of businesses certified with that agency in the Explorer database.

Scroll down on the navigation bar to see the number of businesses that hold specific classification types in the application.
Suggestions for Narrowing Search Results

- Filter by geographic area. You can do so by state, city, zip code, etc.

- Determine the most accurate NAICS code for the type of business for which you are looking. The NAICS can effectively narrow your search results.

- Check out specific suppliers to determine how current their certifications are, their size and how they compare to other suppliers.
Other Ways to Use the Explorer Tool

- Let’s open a supplier record, AMERICAN FABRICATION from the resulting list.
  - Click on **Share** and email the listing to someone else AND/OR
  - Click on **Follow** so that you can receive a monthly report on this supplier from supplier.io. If you want to follow a number of suppliers, you can send the list to supplier.io and they will send you monthly reports for each of them.
We can also compare a business to others. Let’s say we search for a laboratory services supplier and find Pinnacle Materials Laboratory.

Click on the Compare button to review other businesses in comparison to Pinnacle.
Other Ways to Use the Explorer Tool (cont’d)

On the resulting page, see the “Similar Companies” section to the right.
Searching Supplier Lists in Explorer

You can look at UC systemwide spend data to find specific types of businesses. These lists are derived from the systemwide Spend Analytics application which holds spend data for all campuses. To start, click on your name in the upper right corner of the screen.

Then open Lists & Projects from the dropdown menu. You can also open Lists & Projects in the left navigation bar on this page.

On the resulting page, click on Supplier Lists.
All UC records are shown, but let’s look at UCB’s record.

This screenshot shows the spend records were last modified/enriched on 4/25/2015 after data from supplier.io provided update diversity coding for the suppliers from which UCB procured supplies or goods.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Suppliers</th>
<th>Last Modified On</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCB</td>
<td>UCOP</td>
<td>2950</td>
<td>4/25/2015</td>
</tr>
</tbody>
</table>

Note this “Actions” section which will be discussed on the next slide.
Searching Supplier Lists in Explorer

Each campus has its own records. On the prior slide, note the Actions header & the buttons underneath it.:

**View** shows a list of businesses with which the campus has done business in the last 6 months.

**Download** allows you to export those businesses to an Excel format. Note that this may take a considerable amount of time given the number of small businesses.

**Reports** shows graphs and pie charts illustrating type of small business ownership by classification code, small business classification, ethnicity, company revenues, employees, & top industries by NAICS.
My Projects in Explorer

You can also create your own project lists for specific types of suppliers. These lists can be maintained for projects or in genera by goods or services subjects, if you notice that departments are looking for particular types of projects. As with the Supplier Lists process, click on your name in the upper right corner of the screen. Then click on Lists & Projects.

In this example, we have conducted a search which resulted in finding this supplier, VECTOR FABRICATION INC which we want to include on a project list.

Open the “ADD TO LIST“ link under the company name or see the next slide for what you can do if you are looking at the supplier’s more detailed profile.
My Projects in Explorer

Let’s say we had previously created a project list for “aerospace circuit board assembly”, but we want to create a new list for “aerospace fabrication”.

We type in “aerospace fabrication” to create a new list
Once we do so, we can:

- Find that project list by opening “LISTS & PROJECTS” in the left navigation bar
- Scroll down to “Aerospace Fabrication” and open it.
We invite you to use Explorer

The more you try it out, the more you will see how you and your department can use it.

For support from supplier.io, click on the Button at the bottom of every page.

You can also contact the Supplier Diversity Program Manager at rgerst@berkeley.edu.

We hope you find it useful!