

How to Use the Explorer Tool

UC Systemwide Supplier Diversity Portal

provided by supplier.io

Getting Access to supplier.io

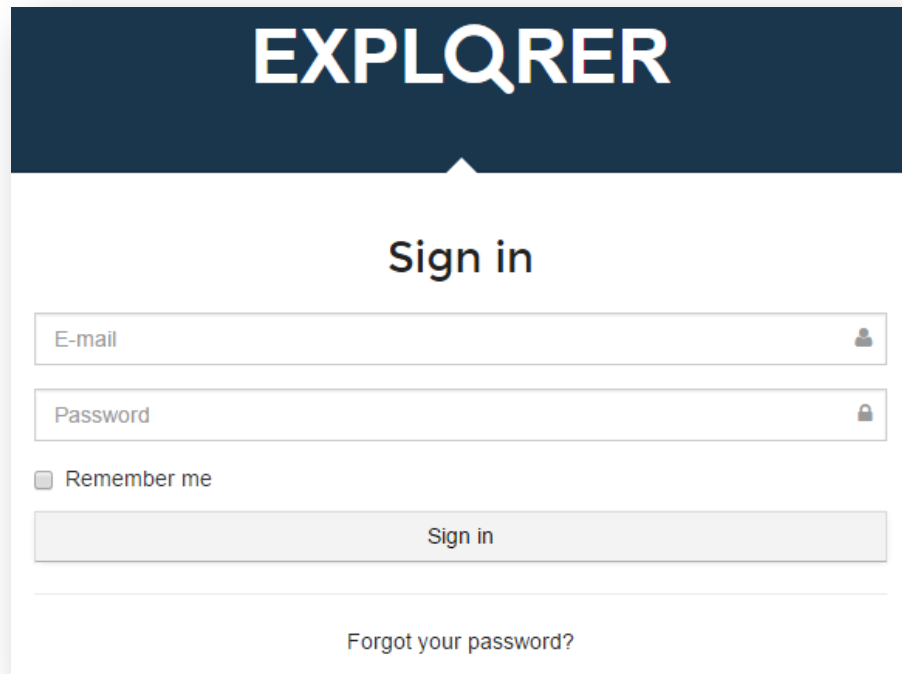
- Email your campus Supplier Diversity Program Manager at rgerst@berkeley.edu or roesia.gerstein@ucsf.edu to request access
- You will receive an email inviting you to sign into the supplier.io website with a temporary password. See screenshot example below. This is not spam or a phishing email. Make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

Roesia Gerstein has created a new Explorer account for you.

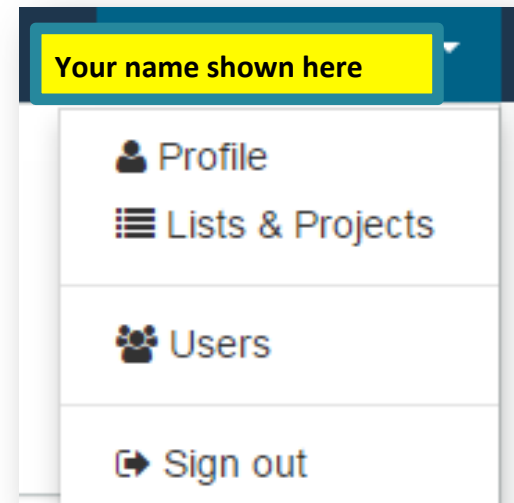
Welcome to the [supplier.io](#) Explorer - your definitive source for diverse suppliers! We look forward to having you as part of our community of supplier diversity and sourcing professionals.

Explorer – supplier.io tool

- 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.





The screenshot shows the 'EXPLQRER' sign-in interface. It features a dark blue header with the word 'EXPLQRER' in white. Below the header, the text 'Sign in' is centered. There are two input fields: 'E-mail' and 'Password', each with a small icon on the right. Below these fields is a 'Remember me' checkbox. A 'Sign in' button is positioned below the checkbox. At the bottom, there is a link that says 'Forgot your password?'.



Explorer – supplier.io tool

EXPLORER

 **User profile**

 **Login Information**

E-mail

Your email address

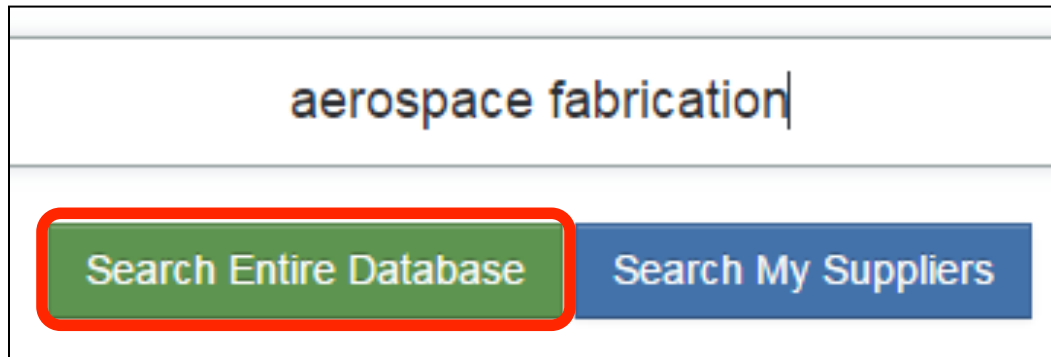
☐ **Change password?**

Click “Change password?” checkbox to reset your password

Using the Explorer tool

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.



aerospace fabrication

Search Entire Database Search My Suppliers

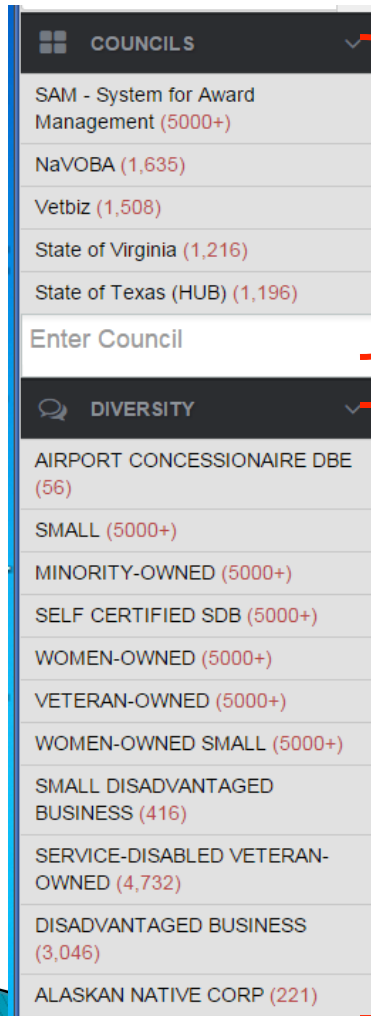
Example: Quick View of the Explorer Tool

- “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

The screenshot shows the Explorer Tool interface. The search bar contains 'aerospace fabrication' (item 1). The filters section shows 'California' selected for the STATE (item 2). The results table lists three organizations: HAWS FABRICATION INC, AMERICAN FABRICATION, and K FABRICATION AND DESIGN. Each organization has a classification code (VET, SBE, SBE) highlighted in a red box. A yellow callout box points to these codes with the text 'Note the classification codes for each'.

ORGANIZATION	LOCATION	EMPLOYEES	SALES	INDUSTRY	DIVERSITY ATTRIBUTES
HAWS FABRICATION INC	VENTURA, CA				VET
AMERICAN FABRICATION RUSSELL FABRICATION CORP	BAKERSFIELD, CA	11-50			SBE
K FABRICATION AND DESIGN K FABRICATION INC	CORONA, CA	11-50	\$1M-10M		SBE

Example: Quick View of the Explorer Tool (cont'd)



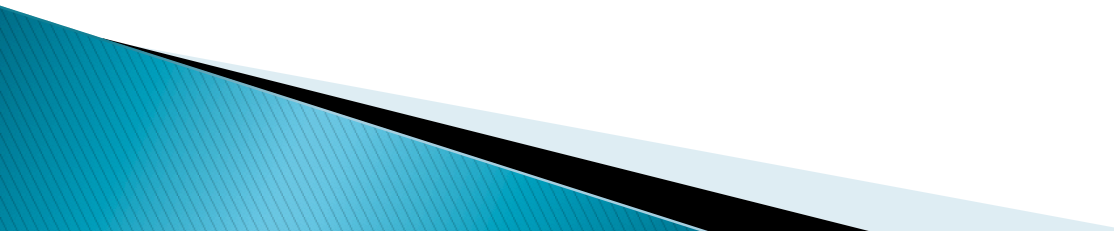
If you scroll farther down on the left navigation bar, you can see the source agencies for the results. The number in parentheses is the number of businesses certified with that agency in the Explorer database.

Farther down on the navigation bar, you can 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.
- Once you get results, you can use the Compare button to check out other similar suppliers.

Suggestions for Narrowing Search Results

- 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.
- We can click on:
 1. **Share** and email the listing to someone else AND/OR
 2. **Follow** so that we will get a monthly report on this supplier from supplier.io. If we want to follow a number of suppliers, we can send supplier.io the list and they will send us reports for each of them once per months.

◀ Back to Search Results

DIVERSITY
SBE

AMERICAN FABRICATION

Share

Follow

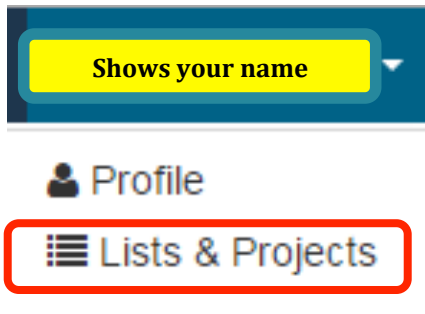
4940 GILMORE AVE BAKERSFIELD, CA 93308. (661) 861-8495

DBA: RUSSELL FABRICATION CORP

METAL FABRICATION (STAINLESS STEEL, ALUMINUM, CARBON STEEL, PIPE, SHEET METAL)- SHEARING, PLASMA CUTTING, SAW CUTTING, THREADING, FORMING, ROLLING, PUNCHING, WELDING, SANDBLASTING & POWDER COATING

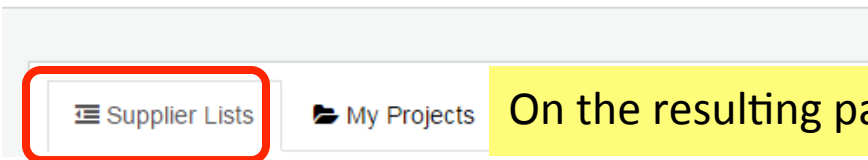
Searching Supplier Lists in Explorer

You can also look at UC systemwide 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.

Supplier Lists and My Projects



On the resulting page, click on Supplier Lists

Searching Supplier Lists in Explorer

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 was provided to update the diversity coding of the suppliers from which UCB procured supplies or goods.

Supplier Lists

My Projects

Supplier Lists

Lists of suppliers enriched by UCOP

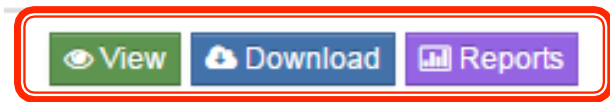
Name	Description	Suppliers	Last Modified On	Actions
UCB	UCOP	2950	4/25/2015	<div><div>View</div><div>Download</div><div>Reports</div></div>

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:

Actions



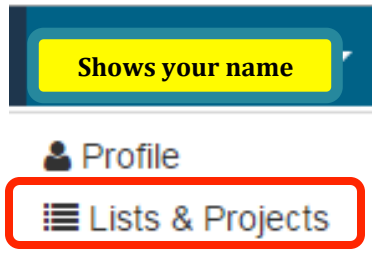
View shows a list of businesses with which the campus has done business in the last 6 months.

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 by goods or services topics. 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.

**VECTOR
FABRICATION INC**
MILPITAS, CA
☐ COMPARE | [ADD TO 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".

VECTOR FABRICATION INC vectorfab.com [Share](#) [Follow](#)

1629 WATSON CT MILPITAS, CA 95035. (408) 942-9800

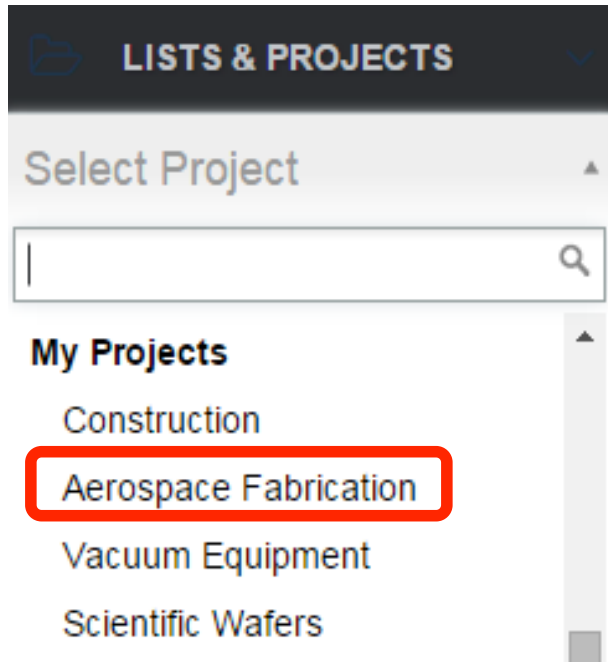
Based out of Milpitas, CA VECTOR FABRICATION INC operates in the Bare Printed Circuit Board Manufacturing. E 1995, the company has about 11-50 employees and annual revenues of \$1M-10M.

Assign to projects (only visible to you):

We type in "aerospace fabrication" to create a new list

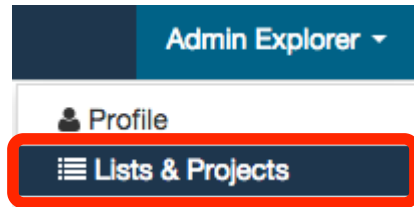
Creating Your Own Project List



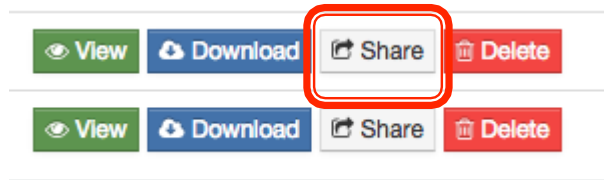
Once we do so, we can:

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

Creating Your Own Project List




- Your lists are also available from the Lists & Projects dropdown on the top right corner.



- You can share your lists with colleagues. Once you do so, any updates that you make in your lists will automatically update it for all your colleagues.

We invite you to use Explorer

- The more you use it, the more you will see how you and your department can maximize its capabilities.
- If you experience errors, email your campus Supplier Diversity Program Manager or
- Use the  link at the bottom of the page to report the issue to supplier.io.