



Spend Manager Admin Guide


Basware P2P 18.2

1 Spend Manager Administration Overview

The Spend Manager module provides dashboard views of data stored in Basware P2P.

1.1 Access to Spend Manager – KPIs and Dashboards

In order to access the Spend Manager KPIs and Dashboards, the client must have a proper license to allow access. This can be verified by viewing the License page under the Administration Tools icon



Existing License

Verian Version Number	171.00.02.00.00 (internal)
Licensee	Production Cloud 2
Company	Basware (Basware)
User Count	120
License by Module	119 / 150 (Purchasing) 1 / 10 (Expense) 101 / 150 (Assets & WorkOrders) 0 / 10 (Vendor Portal) 3 / 100 (Invoice) 19 / 150 (Budeets) 1 / 10 (Spend Manager)
Webserver Port	443
Webserver Protocol	HTTP/1.1

Generate PGP Encryption Keys
(No keys)

Generate key

Figure 1: License screen displaying 25000 Spend Manager licenses with 2 in use

When licenses are available, an administrator may assign those licenses on a per-user basis by editing the user.

Figure 2: Edit User screen

As the third step, the user or user group must be granted permissions to access the KPIs in Spend Manager.

Figure 3: Assigning Spend Manager Permissions

Users with the permission 4010 – *Manage Spend Manager* have further control over the users who can view each KPI.

1.2 Access to Spend Manager – Ad Hoc Reporting

In order to access Ad Hoc Reporting, the user needs to have permission 22 – *Manage Reports* or permission 23 – *Run Reports*. This allows power users to access the Ad Hoc Reporting link under Spend Manager.

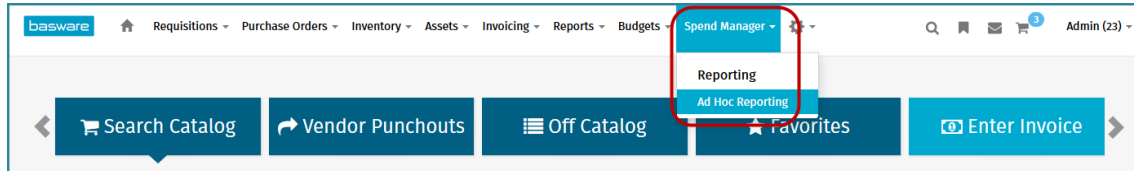


Figure 4: Ad Hoc Reporting Menu

Clicking the Ad Hoc Reporting link logs users automatically into the ad hoc reporting functionality system.

If user has permission 22 – *Manage Reports*, they can create ad hoc views and reports.

If user only has permission 23 – *Run Reports*, they are able to run the Standard Reports deployed in Spend Manager.



When creating an ad hoc report, Basware recommends you do not use special characters in the report title. Titles with special characters will cause an error when exporting the report to Excel. This includes the following characters:

- < (less than)
- > (greater than)
- : (colon)
- " (double quote)
- / (forward slash)
- \ (backslash)
- | (vertical bar or pipe)
- ? (question mark)
- * (asterisk)

1.3 Token Generation

The system generates an SSO tokens for users who have access to Spend Manager module.

Any time that user logs in, a token is generated for them and is stored in the UserTokens table as well as in the Session VerianServiceToken. The IP Address and the signature of the client are also stored in the UserTokens table. This token is used to access and establish the session on the Jaspersoft server.

Actions That Remove User Tokens

- End of session – removes the token
 - When a session for the user ends because of inactivity, the token for the user is automatically deleted.
- Logout – removes the token
 - When a user logs out of the system, the token is removed.
- Scheduled task – removes expired tokens
- Clear Expired SSO Tokens is a PitMainDayBegin task.
 - This task deletes any tokens that are older than 8 hours.