

CIO INCIGHT® USER GUIDE

VERSION 5.0 August 2025

CIO InCight® User Guide

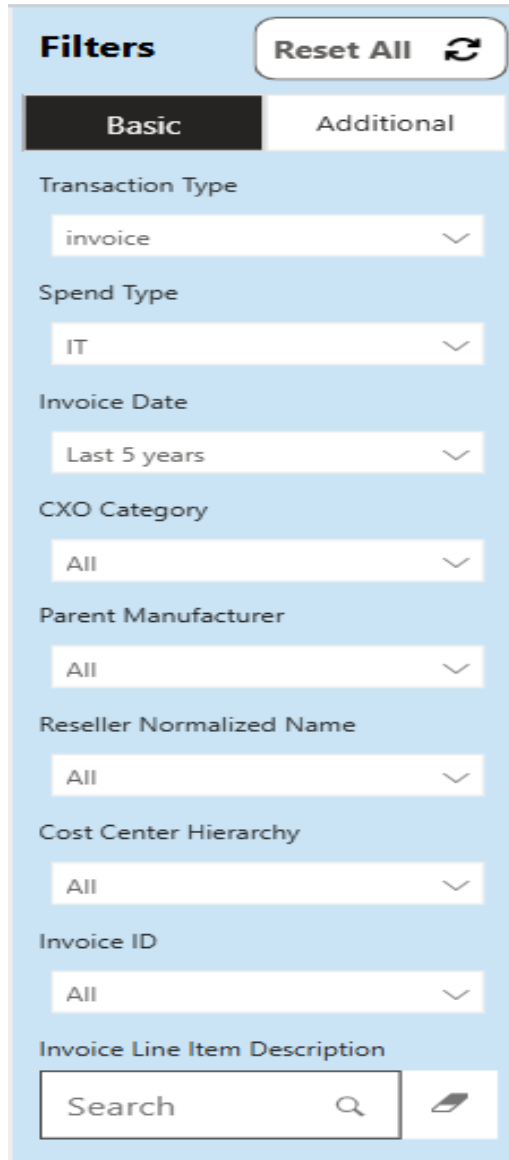
Contents	1
Getting Started	2
Filters	2
InCight Analyzer	3
InCight Nexus	4
InCight Visualizer	5
Export Data	6
Appendix	10
TBM 4.0 Classification Definitions	10
Help and Support	12

GETTING STARTED


This document describes the fields, filters, and navigation of the **InCight Dashboards** (Nexus, Analyzer and 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 Basic and Additional filters that can be used to sort and search your data. Within the Basic filters you can sort by: Transaction Type, Spend Type, Invoice Date, CXO Category, Parent Manufacturer, Supplier Normalized Name and Invoice Submitter. Each clients filters may be customized per their request of filters to display, and can contain more filters in the Additional Tab.




Filters

Reset All 


Basic

Additional


Transaction Type

invoice 


Spend Type

IT 


Invoice Date

Last 5 years 


CXO Category

All 


Parent Manufacturer

All 


Reseller Normalized Name

All 



Cost Center Hierarchy

All 

Invoice ID

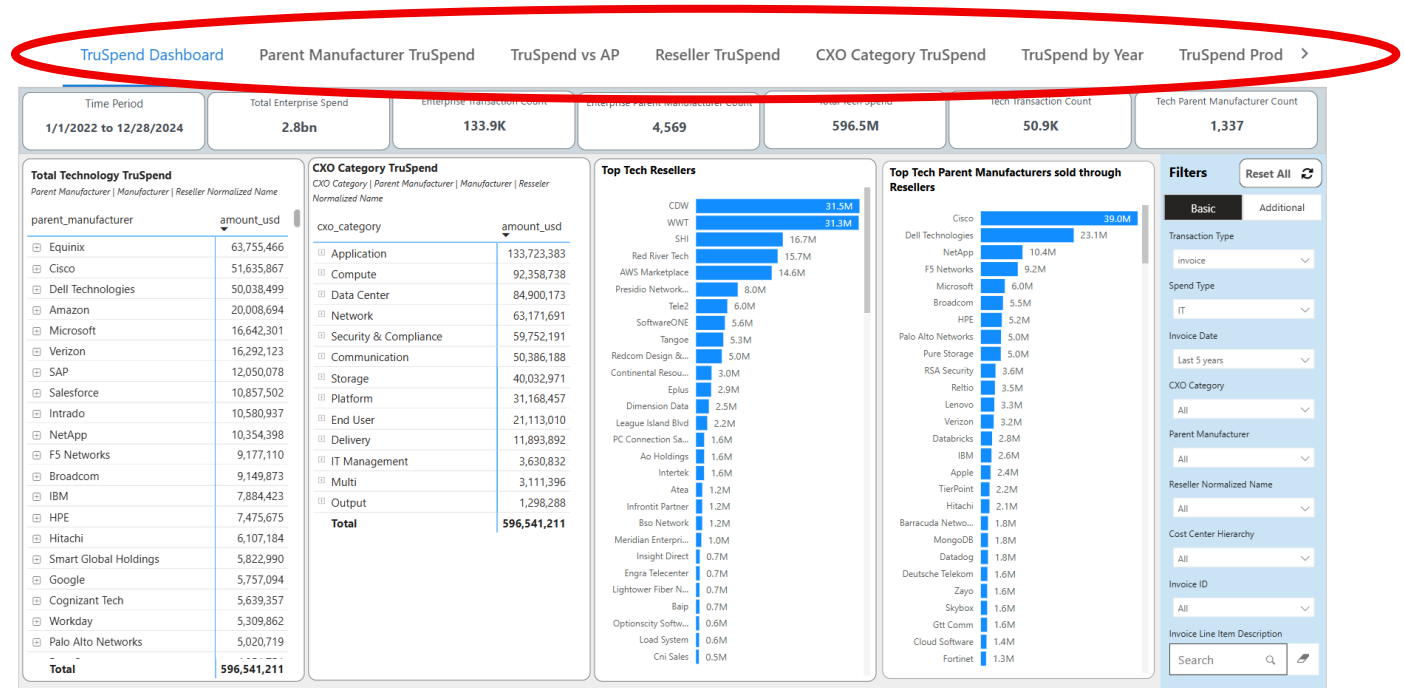
All 

Invoice Line Item Description

ANALYZER Dashboard

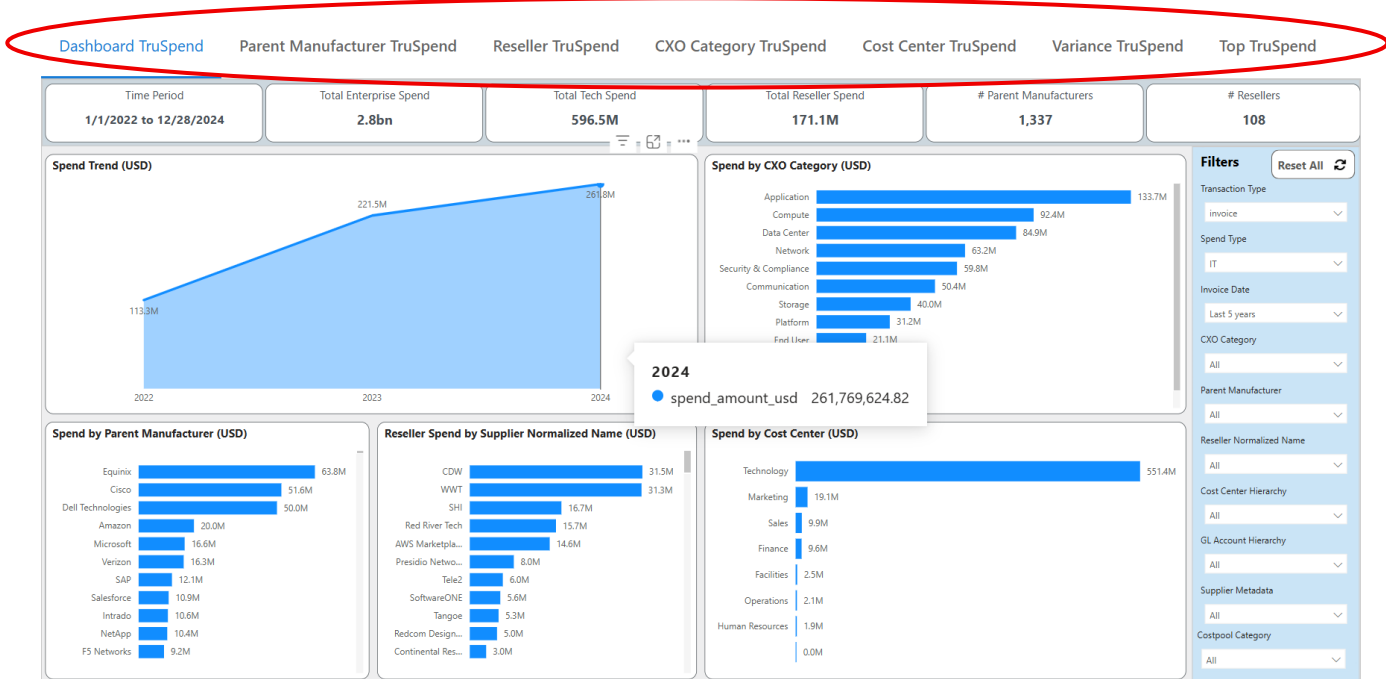
TruSpend Dashboard is your default landing page loads when you log-in to your CXO Nexus™, CIO InCight instance. Your Analyzer Dashboard provides a granular view of your data. Within the Analyzer Dashboard, you can drill down into different cost savings views. Users can download data directly into Excel from any of the views in an Analyzer tab. There are nine Tabs in the Analyzer Dashboard, scroll to the right to view the additional tabs. Data Summary Statistics are included that reflect the current view selected in the tab. The Tabs are:



- **TruSpend Dashboard** - Provides a snapshot of key technology views provided by CIO InCight.
- **Parent Manufacturer TruSpend** - Provides users 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** - 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** - 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** - Provides 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** - 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** - Identifies spend trends by Cost Center and allows you to drill down into each Cost Center to see more granular spend details.
- **TruSpend Data Export** - 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 the Export Data module.

NEXUS Dashboard

Nexus™ offers a high-level overview of the Direct and Reseller spend. You can choose from the Page Navigator on the top of the page to access the available TruSpend Tabs. In some of the spend category modules you will be able to see both a graphic profile view and a spend detail tabular 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.

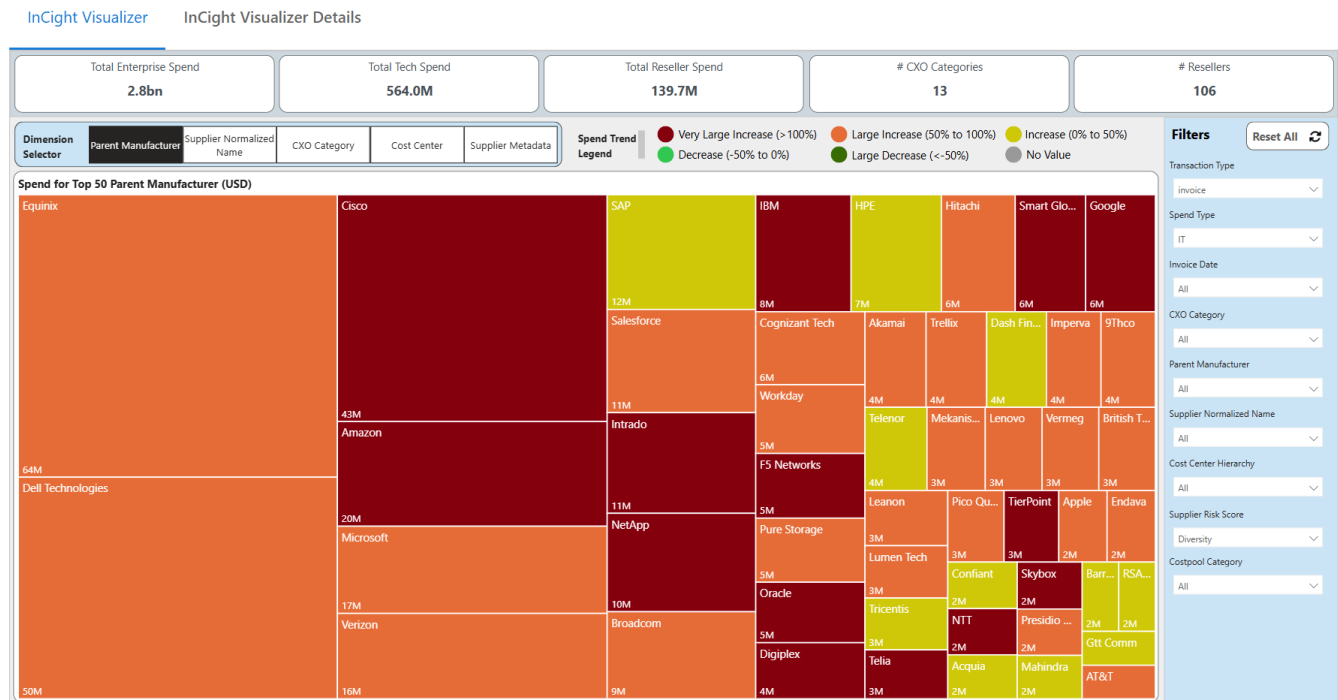
This is a standard taxonomy to describe cost sources, technologies, IT resources (IT towers), applications, and services to promote alignment between IT, Finance, and Business Unit leaders. TBM taxonomy provides a generally accepted way of categorizing and reporting IT costs and other metrics. The standard [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.

VISUALIZER Dashboard

The Visualizer Dashboard presents a graphical display of your Parent Manufacturer spend data based on preset or custom filters. CXO Nexus has provided you with a default selection of TruSpend system views; Category, OEM, Parent Manufacturer, Reseller, and Supplier TruSpend views. Category TruSpend is the default view displayed when you first log into InCight. TruSpend views are dependent upon the type of data you've provided, such as PO and Invoice data.

Each view starts on a primary element and takes you on a predefined path to supporting data with every click. Anywhere along the way, you can select a different relative data point or go back to a previous data point by clicking on the populating text above the heatmap and below the InCight Visualizer ribbon menu.



Category TruSpend

The size of each box is relative to the total spend at the level displayed. Metadata also plays a role in the display. In the example, Spend Trend is the metadata that determines the colors of the tiles. With each mouse click, you can explore the depths of your data along one of these preset paths or create your own with the variables provided in the InCight Visualizer ribbon menu above the heatmap.

EXPORT DATA

Export Data - Users can export data 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.

Select Date Range

Select Filters

Select Fields

Date Field

Document Date

☐ Include empty/invalid dates

From

01/01/2021

To

12/27/2021

January 2021

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December 2021

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Actions

Export Data as CSV

Download History

Last Downloads:

REFRESH

Created ...	Status	Download	Open Params
No rows			

Templates

Save Export Template

Open Export Template

1. Verify the data Timeframe - default is full data set.
2. Verify calendar reference – default is Paid Invoice Date, also available are GL Date, Document Date (Invoice Date), and PO Date.

3. Use filters to create the download report parameters - Five filters are displayed though additional filters can be available if they have been requested:

- CXO Category
- Parent Manufacturer
- Manufacturer
- Normalized Supplier Name
- Batch

Select Date Range

Select Filters

Select Fields

Batches

CXO Categories

Parent Manufacturers

Manufacturers

Normalized Supplier Names

Select Specific CXO Categories

Clear Selection

All CXO categories included by default

Select Specific Parent Manufacturers

Clear Selection

All Parent Manufacturers included by default

Select Specific Manufacturers

Clear Selection

All Manufacturers included by default

Select Specific Normalized Supplier Names

Clear Selection

All Normalized Supplier Names included by default

Actions

Export Data as CSV

Download History

Last Downloads:

REFRESH

Created ...	Status	Download	Open Params
No rows			

Templates

Save Export Template

Open Export Template

4. All Fields are the default for report content – Users have the option to pick the Fields they require.
5. To initiate export, click on the green “Export Data as CSV” button. Note you can save an Export Report format as a named Template to easily export with updated data.

[Select Date Range](#)
[Select Filters](#)
[Select Fields](#)

[Select All](#)
[Clear](#)

Transaction Fields

<input checked="" type="checkbox"/> batchid	<input checked="" type="checkbox"/> conversion_rate	<input checked="" type="checkbox"/> cost_center_code
<input checked="" type="checkbox"/> cost_center_name	<input checked="" type="checkbox"/> currency_code	<input checked="" type="checkbox"/> custid
<input checked="" type="checkbox"/> customer_original_supplier	<input checked="" type="checkbox"/> customer_original_supplier_identifier	<input checked="" type="checkbox"/> custom_fields
<input checked="" type="checkbox"/> cxo_category	<input checked="" type="checkbox"/> document_date	<input checked="" type="checkbox"/> gl_account_code
<input checked="" type="checkbox"/> gl_account_name	<input checked="" type="checkbox"/> gl_posting_date	<input checked="" type="checkbox"/> invoice_id
<input checked="" type="checkbox"/> invoice_line_item_id	<input checked="" type="checkbox"/> line_item_description	<input checked="" type="checkbox"/> line_item_discount_amount
<input checked="" type="checkbox"/> line_item_quantity	<input checked="" type="checkbox"/> line_item_unit_price	<input checked="" type="checkbox"/> manufacturer
<input checked="" type="checkbox"/> paid_date	<input checked="" type="checkbox"/> parent_manufacturer	<input checked="" type="checkbox"/> parent_supplier
<input checked="" type="checkbox"/> po_id	<input checked="" type="checkbox"/> po_line_item_id	<input checked="" type="checkbox"/> reseller
<input checked="" type="checkbox"/> source_entity	<input checked="" type="checkbox"/> supplier_normalized_name	<input checked="" type="checkbox"/> system_of_record
<input checked="" type="checkbox"/> transaction_amount	<input checked="" type="checkbox"/> transaction_amount_usd	<input checked="" type="checkbox"/> transaction_type

Actions

[Export Data as CSV](#)

[Download History](#)

Last Downloads:

Created ...	Status	Download
No rows		


Templates

[Save Export Template](#)

[Open Export Template](#)


6. An e-mail is sent to confirm the report request. Note the Job number ID for the request
7. A second e-mail is sent when the report is ready for download. Click on the link provided
8. Click on the Download link to download your file. We recommend using Chrome. Other browsers may display the download file in an alternative format.

Data export request submitted



CXO Nexus <no-reply@cxonexus.com>

To: ● Chris Andrews



Thu 5/22/2025 3:25 PM


Your request for data export is being processed.

When it's completed, you will receive an email including a link to download a file including all the data you requested.

Thank you,

Job id: horizon:export_customer_transactions_4be1d44fb1fb

CXO Nexus Customer Success
customersuccess@cxonexus.com




CXO Nexus

Transforming Data into InCight®


↩ Reply
➡ Forward

Data export file is ready to download



CXO Nexus <no-reply@cxonexus.com>

To: ● Chris Andrews



Thu 5/22/2025 3:26 PM


Your file is ready to download

Please click on this [link](#)

This link will expire in 7 days.

Job id: horizon:export_customer_transactions_4be1d44fb1fb

CXO Nexus Customer Success
customersuccess@cxonexus.com



CXO Nexus

Transforming Data into InCight®

↩ Reply
➡ Forward

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.

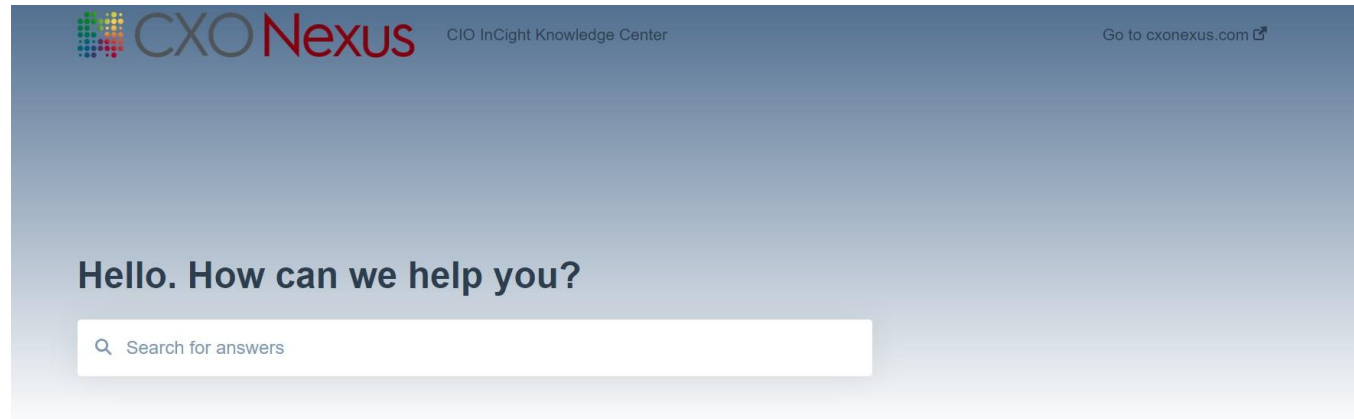
STORAGE

Storage resources which enable mission critical apps data & services. Storage resources which enable essential but non mission critical apps data & service. Storage resources are 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.



Getting Started

Video Overview of CXO Nexus Dashboard

How to do a Secure Data Transfer with CXO Nexus

See all articles →



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?

See all articles →



InCight Insider

TruSpend® is the Single Source of Truth - Providing Data for Vendor Spend for an Analytics Warehouse

Cost Center Clarity - Finding IT Spend in the Business

Cloud Tru-Incight

M&A: Fast Track Vendor Optimization

C-Suite Collaboration to Improve P&L

See all articles →



Release Notes

December 2022 InCight Nexus Reporting Module Release Notes

Pluto May 2020 Release Notes

May 2021 Version release

See all articles →