NC eProcurement

Reporting

Reporting is an important component in the Contracts process. Utilizing the reporting functions in Contracts enables a user to quickly analyze key information based on the needs of the individual user or entity.

Note: Reporting data is pulled at intervals rather than in real time. It might take up to 24 hours for the data from your latest transactions to display in reports.

I. Running Prepackaged Reports

- 1. Prepackaged Reports are designed to meet the most common reporting needs in the tool and can be accessed using the '**Manage**' function in one of two places on the Contracts Dashboard:
 - a. Under 'Manage' on the 'Common Actions' portlet, select 'Prepackaged Reports.' Click on the 'More' drop-down menu if Prepacked Reports does not immediately appear.
 - b. In the upper right, select the 'Manage' drop-down menu, then select 'Prepackaged Reports.'

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HOME SOURCING CONTRACTS	SUPPLIERS			Admir	Recen nistration	Mana	/	Create - c Reports	٦
Contract Workspace (Procurement) V Search	ch using Title, ID, or any other term		✓ Q	Claus	e Library		Repo	rt Search Filters	
				My Ta	asks		Sourc	cing Library	
	To Do	~	My Documents	Perso	onal Work	space	Suppl	lier Knowledge	
Create E Contract Workspace (Procurement)	Date ↓ Status Title		Title	Prepa	ackaged F	Reports	,		
Contract Request (Procurement) 2	^{2/3/2020} Select 'Prepackaged	v Attachments)	SITP Contract			1/29/	2020	Draft	
Analytical Report 1	1/28/2020 Reports' under 'Manage' on	ts)	Test IT Contract			1/29/	2020	Draft	
Compound Report	either the drop-down in the	View All 🔻	Software Subscription Arder	nt ABM		1/23/	/2020	Published	
	top right or in the 'Common		Janitorial Services - Murrco -	JMS		1/23/	/2020	Published	
Prepackaged Reports	Actions' portlet on the left.	~	Janitorial Services - Capital Jan	anitorial - JN	IS	1/23/	/2020	Published	
My Tasks			Snow Plow Attachments			1/23/	/2020	Draft	
Administration More •			Porconal Workspace			1/00/	0000	Draft •	
WOIG +								View All 🔻	

2. On the '**Prepacked Reports'** page, the default view lists the report type alphabetically by Name, with the Owner (always '**aribasystem**') listed to the right. To view the reporting options available within each report type, click on the report name, and then select '**Open**' from the Action drop-down menu.

repacka	aged Reports			Show Details Actions 🗸	
				Show Details Actions +	
Name				Owner	
* ?	Ariba Benchmark Prog	ram Reports .		aribasystem	
	Contract Workspace (P	Procurement) Analysis	5	aribasystem	
2 2	Action	\nalysis ,		aribasystem	
*	Open	•	Click on the 'Name' of the	aribasystem	
*	View Details		desired report type and select	aribasystem	
* 2	Search		'Open' from the drop-down.	aribasystem	
* 2	Unlock Document	ts		aribasystem	
	Create	ypes)-		aribasystem	
* 2	Shortcut			aribasystem	
* 2	Project Task Analysis			aribasystem	
<u>_</u> ?	Sourcing Project Analys	sis		aribasystem	

Note: Two recommended 'Prepackaged Reports' are those for 'Contract Workspace (Procurement) Analysis' and 'Contracts Task Analysis.'

- a. 'Contract Workspace (Procurement) Analysis' reports are designed to provide visibility into an entity's contract activity by supplier, commodity, owner, etc., and allow for entity-wide monitoring of contracts that are set to expire soon.
- b. **'Contracts Task Analysis'** reports are designed to provide analysis of contract project lifecycle and help identify process bottlenecks.
- 3. The next screen displays the reports available based on the previously selected report type. Choose a report to run by clicking on the report name and selecting **'Open'** from the Action menu.
- 4. The '**Refine Data'** page is displayed, and users can filter the data to include in the report by selecting specific values for each of the fields. Once all filters have been set, click on '**View Report**' to generate the prepackaged report, taking you to the '**Reporting**' page.

Refine Data	View Report	Cancel Export Background
Filter the data in your report by s	electing values for the fields below. All reports include a date field filter. To	select a different date field to use as a filter, select Advanced More
Region (L1):	(AII) ~	\mathbf{N}
State:	Active	
Contract Status:		On the ' Refine Data ' page, set the filters to the desired settings and click
Related ID:	(AII) V	'View Report' to generate the report.
Common Supplier: Start Date (Calendar): *	(Al) ~	Note: 'Region' is a default field but should not pertain to the way the State uses NC eProcurement Contracts.
	Time period: Year(s) V Most recent 2 V time periods	
	Future 0 time periods Include current partial year Fixed date range from: 1/1/2019 to: 12/31/2020	

5. The **'Reporting'** page defaults to the **'Aggregate'** view of the report on the **'Pivot table'** tab. To see more details, click the blue button (For this particular report, it's the **'Data'** button, but for other reports the button may have a different name) and select **'Detail View'** from the drop-down.

	Click on 'Data' and select	\rightarrow	Data - Sta	rt Date (Year) ▼
Owner (User) 🗸 🗸 Project Name 🔻	'Detail View' to see more	Project Count	WOVE I IEIG	
Owner (User) 🗸 🔻 Project Name 🔻	information about the items	2020	Up	
Total	in the report.		By Down	4,500,002.00
Agency Contract Admin 3 🔻			Edit in Wizard	4,500,002.00
UAT Agency Non IT Goods-Carpet-Modification v			Show	1,500,001.00*
UAT Agency Non IT Goods-Carpet-Modification v			Aggregate View	1,500,001.00
UAT1 Agency Non-IT Goods v		((Detail View	1,500,000.00

6. When 'Detail View' is selected, additional columns and data will appear, such as 'Project Name,' 'Start Date,' and 'State.'

Pivot table C	hart Dashboard			7				
 Applied Filters 		More specific data is						
■ 33 Start Date State	Spanning: most recent 2 Year(s) Active	columns on the 'Detail View.'			Display Op Min/Max ro Summary			
3 Owner (User	r) Agency Contract Admin 3							
Owner (User)	Project Name	Project Name	Start Date (Date)	Status	State	Owner (User)	Detail Project Count ↓	View - Contract Amount (USD)
Total							3.	4,500,002.00
Agency Contract Admin 3 v	UAT Agency Non IT Goods-Carpet- Modification 🔻	UAT Agency Non IT Goods-Carpet- Modification 🔻	1/15/2020	Gray	Active	Agency Contract Admin 3	1	1,500,001.00
	UAT Agency Non IT Goods-Carpet- Modification •	UAT Agency Non IT Goods-Carpet- Modification 🔻	1/15/2020	Gray	Active	Agency Contract Admin 3	1	1,500,001.00
	UAT1 Agency Non-IT Goods 🔻	UAT1 Agency Non-IT Goods 🔻	1/13/2020	Gray	Active	Agency Contract Admin 3	1	1,500,000.00

- 7. After the report is displayed, users can still perform the following actions:
 - a. Edit: Modify the configuration of the report via the reporting wizard.
 - b. Save: Save this version of the 'Prepackaged Report' to the user's 'Personal Workspace.'
 - c. Export: Export the data to an 'MS Excel' Template for further data analysis.

Users can also review the data visually on the '**Chart**' tab or add the report onto their own '**Dashboard**' by navigating to the '**Dashboard**' tab and clicking '**Add to Dashboard**.'

Active Contract Requests By Owner				ct Requests By Owner						
Pivot table Chart Dashboard										
Applied Filters 33 Start Date Spanning: most recent 2 Year(s) State Active				Users car 'Export' t			e report	Display Op Min/Max ro Summary		
■ 3 Owner (User) Users can click on the 'Chart' tab to display the data visually, or add the report to their 'Dashboard' from the							Detail	View 🗸		
Owner (User) 🗸	Proje	' Dashboard' tab.	Project Name		Start Date (Date)	Status	State	Owner (User)	Project Count ↓	Contract Amount (USD)
Total								3•	4,500,002.00	
Agency Contract Admin 3 v		gency Non IT Goods-Carpet- cation 🔻	UAT Agency Non IT Goo Modification v	ods-Carpet-	1/15/2020	Gray	Active	Agency Contract Admin 3	1	1,500,001.00
UAT Agency Non IT Goods-Carpet- Modification v Modification v		ods-Carpet-	1/15/2020	Gray	Active	Agency Contract Admin 3	1	1,500,001.00		
	UAT1	Agency Non-IT Goods 🗸	UAT1 Agency Non-IT Go	oods 🔻	1/13/2020	Gray	Active	Agency Contract Admin 3	1	1,500,000.00

II. Running Public Reports

 While Prepackaged Reports are standard reports in the system, Public Reports are custom reports that have been made available to all reporting enabled users. Public Reports can be used to meet the more specific reporting needs in the tool, and can be accessed using the 'Manage' function in one of two places on the Contracts Dashboard:

ORTH CAROLINA OPROCUREMENT			Q	. 🛱 🖓 Hel	p ▼ TRN Contract User 029 ▼ NC E-Procurement - TEST
HOME SOURCING CONTRAC				Recent -	Manage Create Public Reports
Contract Workspace (Procurement) V S Common Actions V	earch using Title, ID, or any other term To Do	~	My Doeuments	My Tasks Personal Workspace	Report Search Filters Sourcing Library Supplier Knowledge
Create Contract Workspace (Procurement) Contract Request (Procurement)	Date 4 Status Title Select 'Public Reports'	doex (Snow Plow Attachments)	Title	Prepackaged Repor	1/29/2020 Draft
Analytical Report Compound Report More v	under ' Manage ' on either the drop-down in the top right or	Plow Attachments) View All v	Test IT Contract Software Subscription – Arden		1/29/2020 Draft 1/23/2020 Published
Manage Prepackaged Reports	in the 'Common Actions' portlet on the left.	~	 Janitorial Services - Murrco - J Janitorial Services - Capital Ja 		1/23/2020 Published 1/23/2020 Published
My Tasks Administration More -			Snow Plow Attachments		1/23/2020 Draft

2. Select the applicable report from the list of public reports.

Show Detailed View
Show Details Actions 🔻
Owner
Jason Manjally
Customer Support Admin

3. Use the column headers to filter the results specific to your Agency or export the data for further manipulation in Excel.

Reporting	Contracts Expiring by July 31st
Field Browser Page Others	Pivot table Chart Dashboard Click on the column headers
	Applied Filters to filter the results, or click
	• 2,500,000.00 Start Date Spanning: most recent 12 Year(s) Export to export the data to Jun, Apr, Feb, Jan, Jul, Mar, May Expiration Date (Wonth) Display Options Edit Min/Max rows: 3/8 • 2,500,000.00 Start Date Spanning: most recent 12 Year(s) Export to export the data to Excel for further manipulation.
	Organization (Department (L3)) Statewide IT Procurement, Purchase & Contract
	Detail View ~
¢	Project Rame Contract Id Id Contract ID Owner Status Statu

III. Running Background Reports

Users have the ability to schedule reports to run automatically – in the '**Background**' – even without being logged into NC eProcurement Contracts at the time. Use scheduled reporting for:

- Hands-off reporting: Once a report is scheduled in the background, users do not have to be logged into NC eProcurement Contracts when it runs. Reports can also be scheduled to run at regular intervals on a daily, weekly, or monthly basis.
- Sending reports to recipients: Scheduled reports can be shared with other stakeholders and project members through email. The specified recipients can be other NC eProcurement Contracts users or external email addresses. The report will be delivered as an Excel attachment so that users do not need to log in to view the data, or recipients can click a link to log into the system to view the report there.

To schedule a 'Background' report, follow these steps after selecting a specific report:

1. On the 'Refine Data' page, filter the data as desired and click 'Background.'

Note: Users without the permissions required to 'Save' reports will not see the option to 'Run In Background,' and the 'Background' button located on the 'Refine Data' page will be greyed out.

Refine Data		View Report Cancel Export Background
Filter the data in your report by s	electing values for the fields below. All reports inclu	lude a date field filter. To select a different date field to use as a filter, select Advanced More
Region (L1):	(All)	
State:	Active V	
Contract Status:	(All)	On the ' Refine Data' page, set the filters to the desired settings and click
Related ID:	(All)	'Background' to begin the process of scheduling the report.
Common Supplier:	(All) V	Note: 'Region' is a default field but
Start Date (Calendar): *	_	should not pertain to the way the State uses NC eProcurement Contracts.
	Time period: Year(s)	dises no el localement contracts.
	Most recent 2 v time periods	
	Future $_0$ \checkmark time periods	
	Include current partial year	
	Fixed date range from: 1/1/2019	to: 12/31/2020

- 2. On the next page, change the '**Report Name**' if necessary, and note that the report will be saved by default to the user's '**Personal Workspace**.' Click '**Save**.'
- 3. The **'Schedule Background Report'** page will display, and the user can select how often the report should be run in the **'Schedule'** section of the page.
- 4. In the '**Report Details'** section of the page, the user can set the following:
 - a. **'Number of days or runs to keep':** Number of days is the amount of time results are stored for reports that have been run. Number of runs is the number of stored results to keep for

recurring reports. For example, if the number of runs of a recurring report to keep is 3, when the report runs for the 4th time, the oldest result will be deleted.

- b. 'Attach report to notification email': Check the box to include an Excel version of the report in an email to recipients.
- c. **'Recipient users':** Click **'select'** for a list of internal users to add as recipients of notifications when this report runs.
- d. **'Recipient email addresses':** Enter a list of email addresses, separated by commas, that will receive notifications when this report runs.

	Schedule Background Report: Active Contract Requests By Owner	Cancel
	You can schedule analytical reports to run in the background at specific times and frequencies. Once you have schedu	uled the background report, you do not need to be logged in when it More
$\langle \rangle$	Schedule	
	None Run once as soon as possible	
	Run once on: 2/12/2020 2/12/2020 2/12/2020	On the 'Schedule Background Report' page, set the reporting schedule in the
	Run once for each period of: 1 V Week(s) V on: Sunday V at this time: 3:00 AM V Effective from: 2/12/2020 Effective to: 2/12/2022 Effective to: 2/12/202 Effective to: 2/12/2022 Effective to: 2/12/202 Effective to: 2/12/2	'Schedule' section, and set the recipient information in the 'Report Details'
,		section. Click 'Save' and the report will run when scheduled.
·	Report Details	
	Number of days or runs to keep: 3 V (i)	
	Attach report to notification email:	
	Recipient users: (select a value) [select] (i)	
	Recipient email addresses:	

5. When all details are set, click 'Save' and then 'OK' on the next page, and the report will run automatically per the set-schedule selected.