

NC eProcurement

eReporting Tool eForm

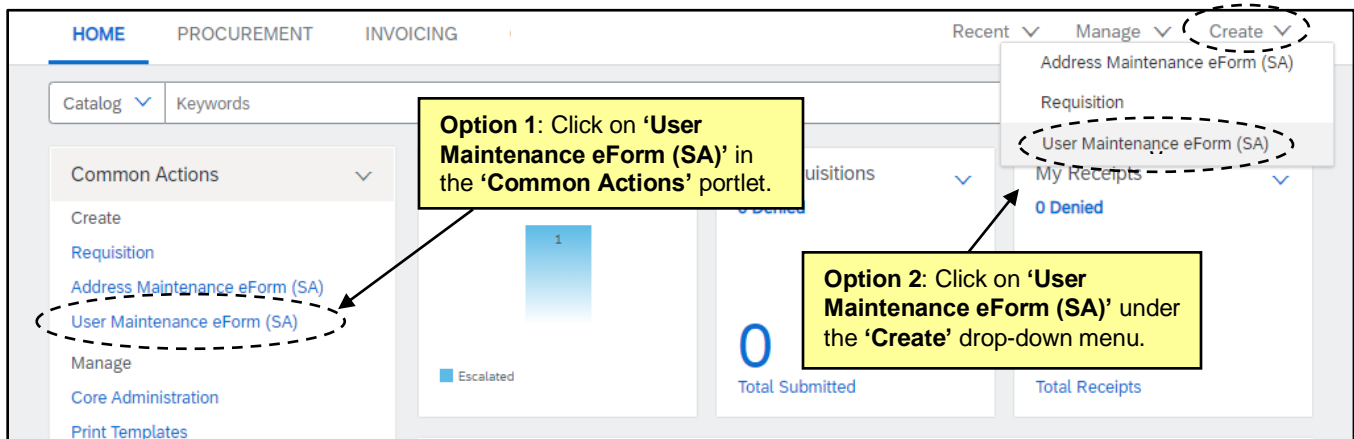
STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACT
ELECTRONIC VENDOR PORTAL HUB CERTIFIED VENDOR
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

NC eProcurement historical data is available through the NC eProcurement eReporting tool. 1-2 users for each agency will have access to the tool, and users must be in a procurement or budget-related position and have access to the corresponding funds for their entity.

Security Administrators within each entity have the ability to request access to the eReporting tool for their users by creating a User Maintenance eForm.

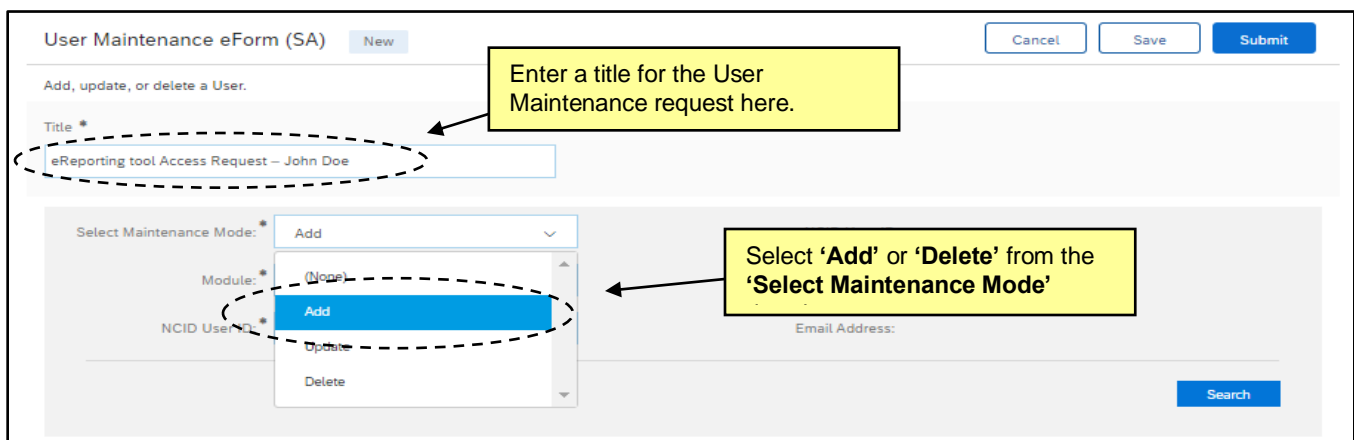
I. Requesting eReporting Access be Added or Removed for a User

1. User Maintenance eForms can only be accessed and completed through the Expert View of NC eProcurement. There is no way to access User Maintenance eForms through the Guided Buying View.
2. To access the User Maintenance eForm, select **'User Maintenance eForm (SA)'** from the **'Common Actions'** portlet or from the **'Create'** menu.



3. The **'User Maintenance eForm (SA)'** page will display. Begin by entering a title for the User Maintenance request (e.g. "eReporting tool Access Request – John Doe").
4. Next, select **'Add'** from the **'Select Maintenance Mode'** drop-down menu.

Note: Select **'Delete'** to request a user's access to eReporting be removed.



5. In the 'Module' dropdown, select 'eProcurement eReporting.'

The screenshot shows the 'User Maintenance eForm (SA)' interface. The 'Module' dropdown menu is open, and 'eProcurement eReporting' is selected. A yellow callout box with the text 'Select 'eProcurement eReporting' in the 'Module' dropdown.' points to the selected option. Other visible fields include 'Title' (eReporting tool Access Request – John Doe), 'Select Maintenance Mode' (Add), 'NCID User ID' (None), and 'Email Address'. A 'Search' button is also visible.

6. Enter the NCID of the user for which access is being requested and click the blue 'Search' button.

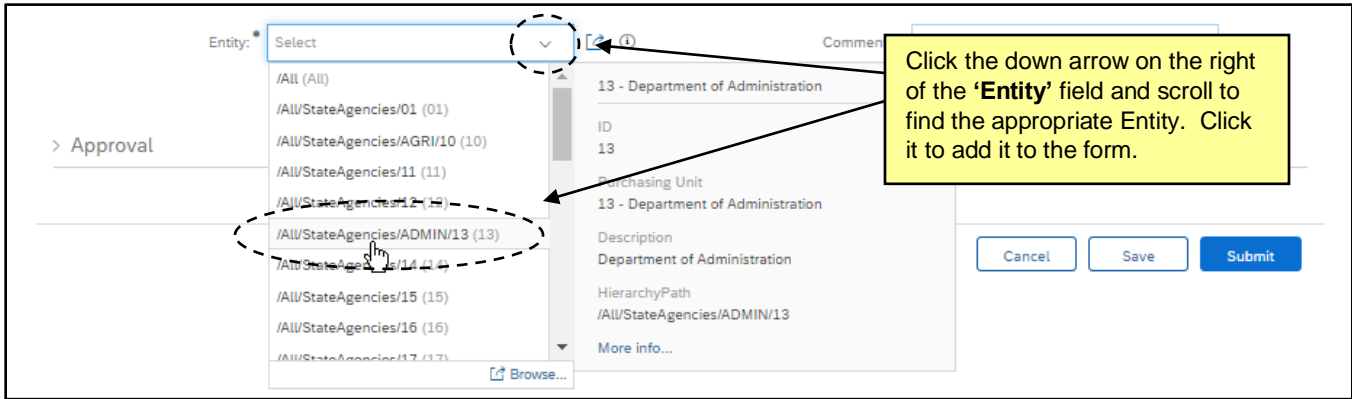
Notes:

- Users must have an active NCID User ID set up before they can gain access to eReporting.
- An error message of 'Invalid NCID' indicates that the NCID user does not exist.
- An error message of 'Disabled/Deactivated User' indicates that the NCID user has already been deactivated.
- If the NCID is associated with an Individual or Business account, the Security Administrator will see an error message stating, 'Only a State or Local NCID account may be used with NCEP.' NCID may be accessed by visiting <https://ncid.nc.gov>.

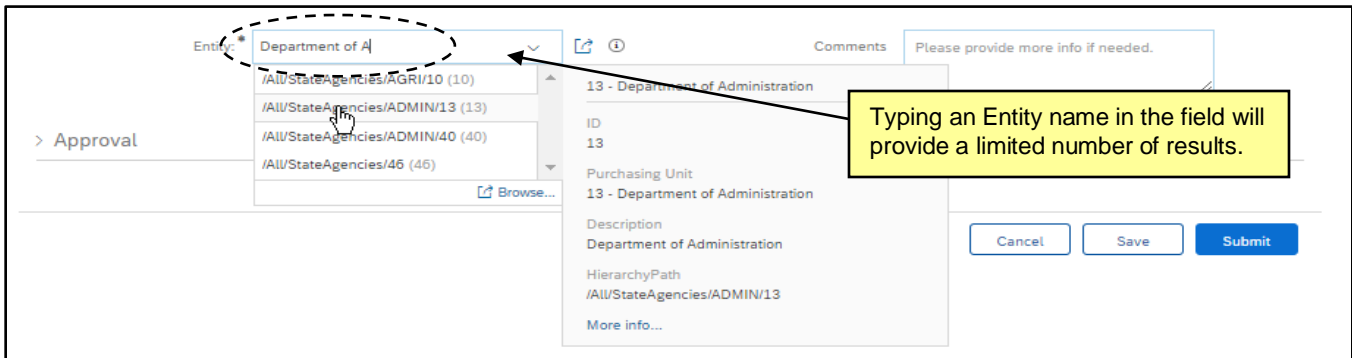
7. Entering a valid NCID will automatically populate the NCID Name and Email Address fields, and the 'Entity' field will display.

The screenshot shows the 'User Maintenance eForm (SA)' interface after a search. The 'NCID User ID' field is populated with 'johndoe'. The 'NCID Name' and 'Email Address' fields are populated with 'John Doe' and 'johndoe@nc.gov' respectively. The 'Entity' field is also populated with 'Select'. A yellow callout box with the text 'After entering a valid NCID and clicking 'Search,' specific user info will populate on the right side of the screen, and the 'Entity' field will display below.' points to the populated fields. A 'Search' button is also visible.

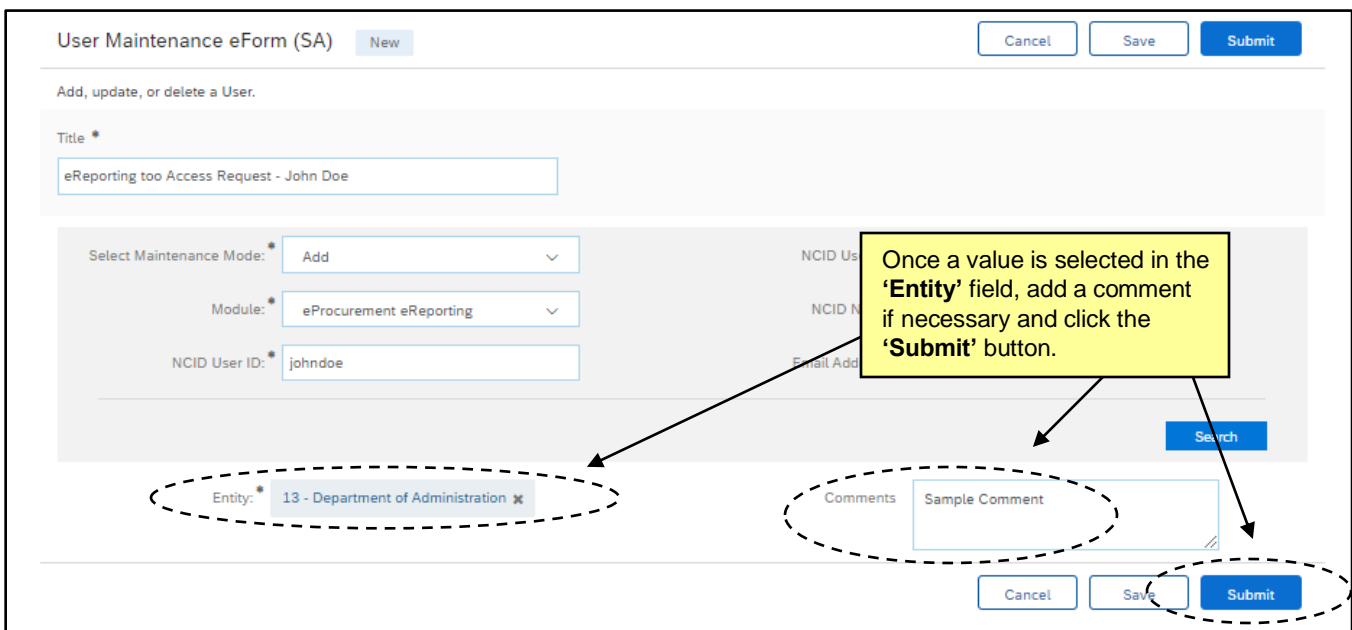
8. In the 'Entity' field, click the down arrow and scroll to find the appropriate Entity, then click it to add it to the form.



9. Alternatively, users can begin typing their Entity name into the field and results will display accordingly.



10. Once an Entity is selected, add any comments if necessary and click the 'Submit' button.



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11. After submitting the eForm, the Security Administrator will see a pop-up window verifying that the eForm was successfully submitted and the eForm will be given an ID number.
12. Click **'Proceed'** to view the request and note that the request will be routed to the **'P&C eReporting Approver.'** Once P&C approves, the Security Administrator will receive an email notification letting them know the request has been fully approved, indicating that access has been granted access to the eReporting tool.

Note: Security Administrators will see an additional **'NC Help Desk'** approver before the **'P&C eReporting Approver'** (not pictured below).

The screenshot displays the 'UMSA158 - User Maintenance eForm (SA)' interface. At the top right, there are buttons for 'Withdraw', 'Exit', and 'Print'. The main content area shows the form details: 'Add, update, or delete a User.', 'Title: eReporting too Access Request - John Doe', 'Select Maintenance Mode: Add', 'Module: eProcurement eReporting', 'NCID User ID: johndoe', and 'Entity: 13 - Department of Administration (13)'. Below this is an 'Approval' section with a 'P&C eReporting Approver' role. A yellow callout box with arrows pointing to the title and the approver role contains the text: 'Once submitted, a User Maintenance number will be applied, and the request will be routed to the 'P&C eReporting Approver.''