eReporting Tool eForm

Introduction

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.

Learning **Objectives**

At the end of this job aid, **you will be able to**:

Find the User Maintenance eForm option.

Fill out an eForm with a eProcurement eReporting module.
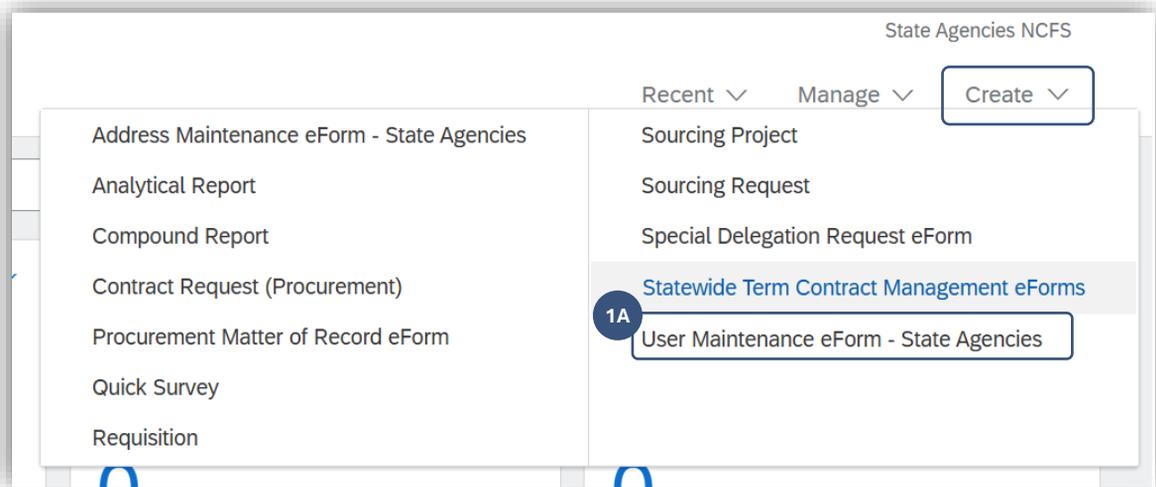
Submit an eProcurement eReporting eForm.

eReporting Tool eForm

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.

    A. To access the User Maintenance eForm, select **User Maintenenace eForm - State Agencies** from the **Common Actions** portlet or from the **Create** menu.

> 📢 Users entering an eForm from the Public Orgainizations realm will select **User Maintenance eForm – Public Orgainization** option form the **Create** menu or **Common Actions** portlet.

State Agencies NCFS

Recent ∨   Manage ∨   Create ∨

Address Maintenance eForm - State Agencies	Sourcing Project
Analytical Report	Sourcing Request
Compound Report	Special Delegation Request eForm
Contract Request (Procurement)	Statewide Term Contract Management eForms
Procurement Matter of Record eForm	**1A** User Maintenance eForm - State Agencies
Quick Survey	
Requisition	

    B. The **User Maintenance eForm** page will display. Begin by entering a title for the User Maintenance request (e.g. "eReporting tool Access Request – John Doe").

    C. Next, select **Add** from the **Select Maintenance Mode** drop-down menu.

> 📢 Select **Delete** to request a users access to eReporting be removed.
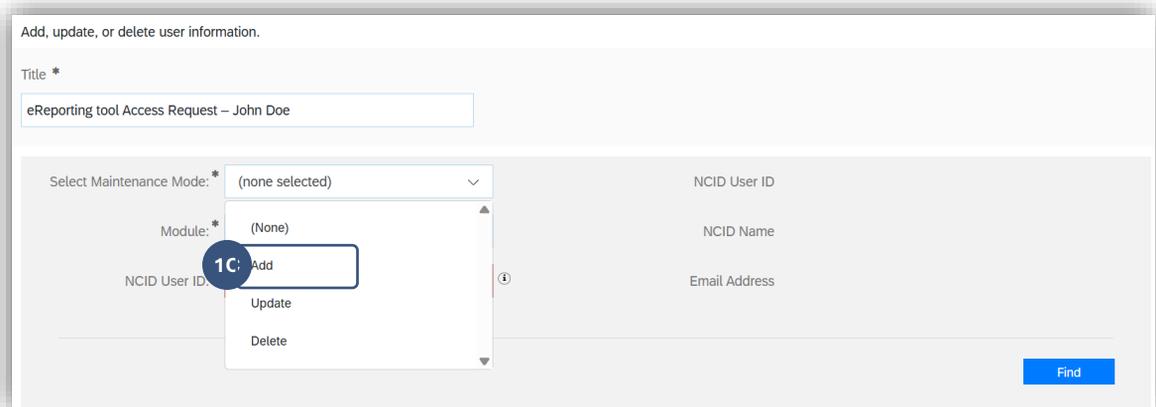
Add, update, or delete user information.

Title *

eReporting tool Access Request – John Doe

Select Maintenance Mode: *	(none selected) ∨		NCID User ID
Module: *	(None)		NCID Name
NCID User ID	**1C** Add	ⓘ	Email Address
	Update		
	Delete		Find

    D. Enter the NCID of the user for which access is being requested and click the blue **Find** button.

eReporting Tool eForm

- 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.

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

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

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

H. Once an **Entity** is selected, click the **Submit** button.

I. 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.

J. 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.

Security Administrators will see an additional **NC Help Desk** approver before the **P&C eReporting Approver**.