



## Reports Process Guide

NC E-Procurement Reports are designed to provide users with access to a variety of procurement information captured within the system. This information includes order summaries based on supplier, eRequisitions waiting to be approved, and user summaries by Entity. NC E-Procurement standard reports offer three choices in report output format: **CSV**, **Excel**, or **HTML** formats. All three formats may be downloaded and saved to files for future use. The **CSV** format may be used in other applications like Microsoft Excel or Access.

Users have access to Reports within NC E-Procurement based on their established roles. Below is a matrix showing which NC E-Procurement roles have access to which Reports. Refer to the User Maintenance process guide for additional information on user roles.

Report Category	Report Name	Non-Integrated Buyer	Non-Integrated Reporting Role	EPLite Requester	EPLite Reporting Role	NCAS Requester	NCAS Reporting Role	NCAS Purchasing Agent	NCAS Central Receiver	All – Security Administrator	All – Extended Reporting Role
Operations	Approval History	X	X	X	X	X	X	X	X	X	X
	Catalog Vs. Non-Catalog Orders	X	X		X	X	X	X		X	
	Requisition Average Cycle Time Analysis	X	X		X	X	X	X		X	
	Requisition Volume Over Time	X	X		X	X	X	X		X	
	Commodity Approvers by Entity									X	
	CPO Approvers by Entity									X	
	Financial Approvers by Entity									X	
	Purchasing Agent Approvers by Entity									X	
User Group by Entity									X		
Orders	Order Details	X	X		X	X	X	X			
	Order Details (Historical)	X	X		X	X	X	X			
	Order Details Extended										X
	Order Summary	X	X		X	X	X	X			
	Order Summary (Historical)	X	X		X	X	X	X			
	Requisition Total, by Supplier	X	X		X	X	X	X			
Receiving	Overdue Orders					X	X	X			
Requisition	Requisition Detail	X	X		X	X	X	X			
	Requisition Detail (Historical)	X	X		X	X	X	X			
	Requisition Detail Extended										X
	Requisitions to be Approved	X	X		X	X	X	X			
	Requisition Summary	X	X		X	X	X	X			
	Requisition Summary (Historical)	X	X		X	X	X	X			
Users	Groups by Entity									X	
	Management Chain									X	
	User By Entity									X	
	User By Entity No Supervisor									X	



**Note:** Users with the 'Global Reporting Role' permission have the ability to view purchasing data for State entities beyond their own.

## I. Running Reports

1. Select 'Reports' from the 'Manage' Shortcut Menu on either the Menu Bar or the 'Common Actions' Portlet.

The screenshot shows the NCE-Procurement ARIBA SPEND MANAGEMENT interface. The 'Manage' menu is open, showing 'Receive Reports' as an option. A yellow callout box points to the 'Receive Reports' option in both the menu and the 'Common Actions' portlet, with the text: 'If you do not have these options, you do not have the roles required to access NC E-Procurement reports. Please consult with your Security Administrator.'



- Click the radio button beside the appropriate report category: **Operations**, **Orders**, **Receiving**, **Requisition**, or **Users**.

**Note:** The standard reports available to each user are based on the user's roles. See the matrix at the beginning of this course for additional information.

- Click **'Next'**.

The screenshot shows the 'Reports' section of the NCE-Procurement application. The breadcrumb trail is 'Home > Reports'. The main heading is 'Select a report category. The category determines the types of reports you can run.' Below this, there are five radio button options: 'Operations' (selected), 'Orders', 'Receiving', 'Requisition', and 'Users'. On the left side, there is a vertical list of steps: '1 Select Category', '2 Select Report', and '3 Run Report'. At the top right, there are 'Next' and 'Exit' buttons. At the bottom right, there are 'Next' and 'Exit' buttons, with the 'Next' button circled in a dashed line.

- Click the radio button beside the report to be run.

**Note:** The reports available are based on the report category selected on the previous screen. See section III. **Report Descriptions by Category** for specific details on each report.

- Click **'Next'**.

The screenshot shows the 'Reports' section of the NCE-Procurement application. The breadcrumb trail is 'Home > Reports'. The main heading is 'Select a report. If you don't see the report you need, return to the previous screen and select a different category.' Below this, there are four radio button options: 'Approval History' (selected), 'Catalog Vs. Non-Catalog Orders', 'Requisition Average Cycle Time Analysis', and 'Requisition Volume Over Time'. Each option has a brief description of the report. On the left side, there is a vertical list of steps: '1 Select Category', '2 Select Report', and '3 Run Report'. At the top right, there are 'Prev', 'Next', and 'Exit' buttons. At the bottom right, there are 'Prev', 'Next', and 'Exit' buttons, with the 'Next' button circled in a dashed line.

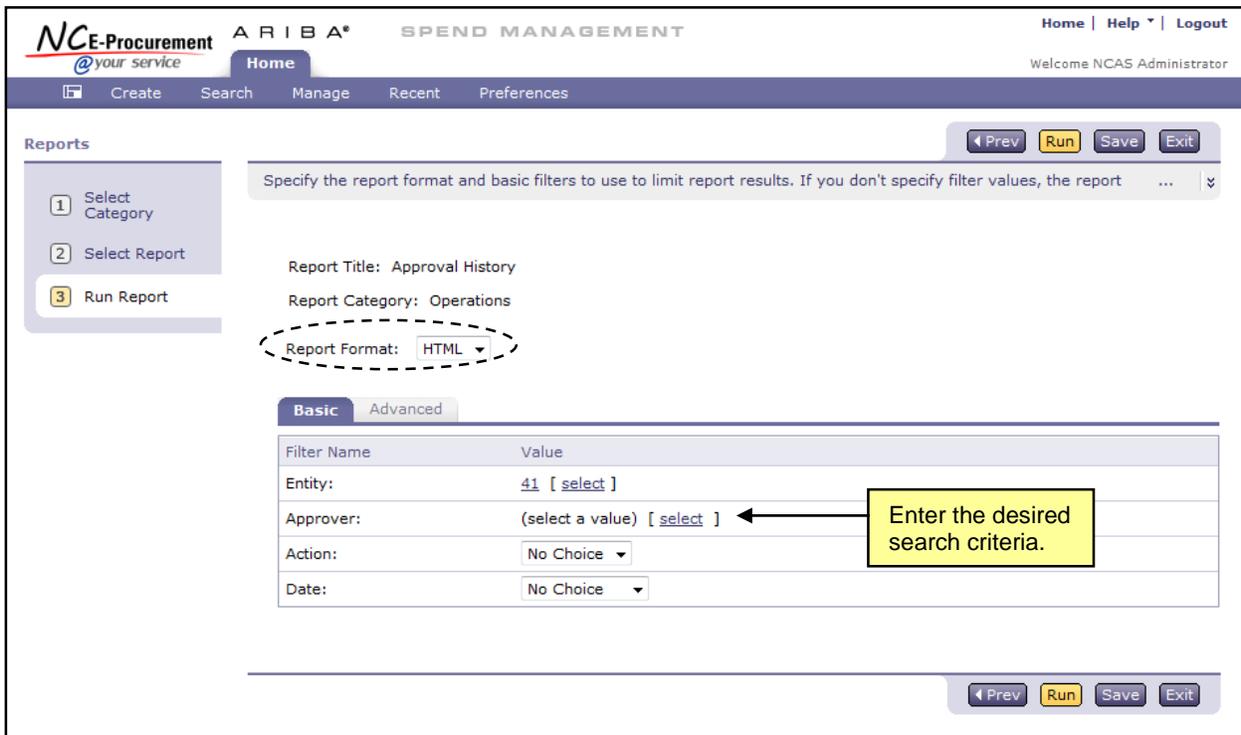
- Select the desired report output format in the **'Report Format'** drop-down menu: **HTML**, **Excel**, or **CSV**.

**Note:** Saving the report in Excel format will allow for easier sorting and filtering of the data.

- Enter the search criteria using either the available drop-down menus or **'Select'** links.

**Note:** The search criteria may differ according to which report is being run.

**Note:** The **'Entity'** field will automatically populate based on the user's entity. It will be uneditable unless the user has global reporting capabilities.



The screenshot shows the NCE-Procurement ARIBA SPEND MANAGEMENT interface. The top navigation bar includes 'Home | Help | Logout' and 'Welcome NCAS Administrator'. The main menu has 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The 'Reports' section is active, showing a sidebar with steps: 1. Select Category, 2. Select Report, and 3. Run Report. The main area displays report configuration for 'Approval History' (Operations category). The 'Report Format' dropdown is set to 'HTML' and is circled. Below, the 'Basic' tab shows filter criteria:

Filter Name	Value
Entity:	41 [ select ]
Approver:	(select a value) [ select ]
Action:	No Choice ▾
Date:	No Choice ▾

A yellow box with the text 'Enter the desired search criteria.' has an arrow pointing to the 'Approver' field. At the bottom, there are 'Prev', 'Run', 'Save', and 'Exit' buttons.

8. For more options, click the **'Advanced'** tab.
9. Click **'Run'**.

**Note:** The report results will open a pop-up window. Pop-up blockers will need to be turned off or set to allow pop-up windows for NC E-Procurement.

The screenshot shows the NCE-Procurement reporting interface. At the top, there is a navigation bar with 'Home | Help | Logout' and 'Welcome NCAS Administrator'. Below this is a menu bar with 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The main content area is titled 'Reports' and contains a sidebar with three steps: '1 Select Category', '2 Select Report', and '3 Run Report'. The main area shows the 'Approval History' report configuration. The 'Report Format' is set to 'HTML'. Below this, there are two tabs: 'Basic' and 'Advanced'. The 'Advanced' tab is selected, and it contains a table with columns 'Name', 'Display', 'Filter', and 'Value'. The table lists several fields with checkboxes for 'Display' and 'Filter' and a 'Value' dropdown. A yellow callout box with arrows pointing to the checkboxes contains the text: 'On the 'Advanced' tab, users may choose which fields to display on the report by selecting or de-selecting the checkboxes beside each field.' At the bottom right, there are buttons for 'Prev', 'Run', 'Save', and 'Exit'. The 'Run' button is highlighted with a dashed circle.

Name ↑	Display	Filter	Value
Action:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No Choice
ApprovalDate:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No Choice
Approver:	<input type="checkbox"/>	<input type="checkbox"/>	(select a value) [ select ]
Approver:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Entity:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Entity:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	41 [ select ]
Request ID:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	



## II. Saving Reports

If a report is needed multiple times, such as running monthly reports on purchases that have been made, it helps to save the report so that the report options do not have to be set each time. How to save a report is discussed below.

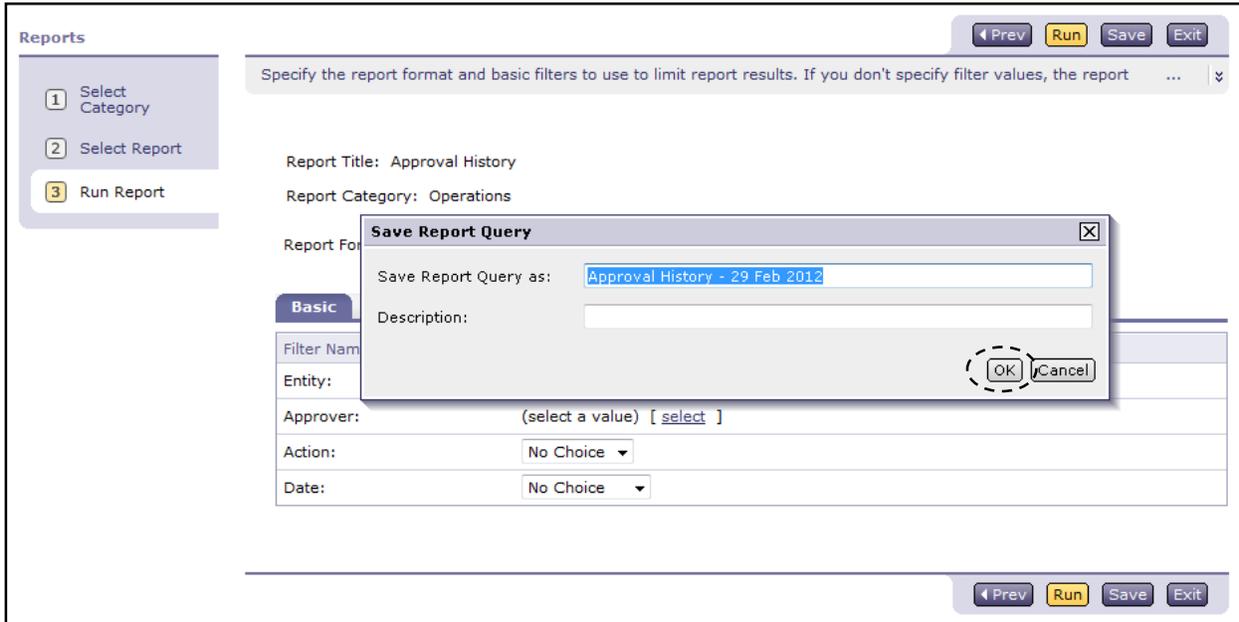
1. Once the report parameters are set as desired, click the **'Save'** button.

The screenshot shows the NCE-Procurement ARIBA Spend Management interface. The top navigation bar includes 'Home | Help | Logout' and 'Welcome NCAS Administrator'. The main menu has 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The 'Reports' section is active, with a sidebar showing three steps: '1 Select Category', '2 Select Report', and '3 Run Report' (highlighted). The main content area has a 'Reports' header with 'Prev', 'Run', 'Save', and 'Exit' buttons. Below the header is a text box: 'Specify the report format and basic filters to use to limit report results. If you don't specify filter values, the report ...'. The report configuration shows: 'Report Title: Approval History', 'Report Category: Operations', and 'Report Format: HTML'. There are two tabs: 'Basic' (selected) and 'Advanced'. The 'Basic' tab contains a table of filters:

Filter Name	Value
Entity:	41 [ select ]
Approver:	(select a value) [ select ]
Action:	No Choice ▾
Date:	No Choice ▾

At the bottom right, the 'Save' button is circled with a dashed line.

2. Enter the **Report Name** and **Description** in the pop-up window.
3. Click the **'OK'** button.



The screenshot displays the 'Reports' application interface. On the left, a sidebar contains three steps: '1 Select Category', '2 Select Report', and '3 Run Report'. The main area shows a report configuration form with the following fields: 'Report Title: Approval History', 'Report Category: Operations', and 'Report For'. A 'Basic' tab is active, showing 'Filter Name', 'Entity', 'Approver: (select a value) [ select ]', 'Action: No Choice', and 'Date: No Choice'. A 'Save Report Query' dialog box is open, with 'Save Report Query as:' set to 'Approval History - 29 Feb 2012' and a blank 'Description:' field. The 'OK' button is circled with a dashed line. Navigation buttons 'Prev', 'Run', 'Save', and 'Exit' are visible at the top and bottom of the main window.



4. Saved reports will be displayed automatically after clicking the **'Reports'** link from the NC E-Procurement Dashboard.
5. Click **'Edit'** to change the settings of the saved report.
6. Click **'Run'** to run the saved report with the current settings.
7. Check the box next to the saved report and click **'Copy'** to create a copy of the saved report parameters.
8. Check the box next to the saved report and click **'Delete'** to delete the saved report parameters.
9. Click **'New Report'** to go to the **'Select Category'** page and run a new report.

The screenshot displays the 'Saved Reports' section of the NCE-Procurement system. At the top, there is a navigation bar with 'Home', 'Help', and 'Logout' links, and a welcome message for the 'NCAS Administrator'. Below this is a secondary navigation bar with 'Create', 'Search', 'Manage', 'Recent', and 'Preferences' options. The main content area is titled 'Saved Reports' and includes a sub-header: 'Edit, run, copy, or delete a saved report query, or create a new report query.' A table lists the saved reports:

<input type="checkbox"/>	Saved Report Query ↑	Category	
<input type="checkbox"/>	Approval History - 29 Feb 2012	Operations	<input type="button" value="Edit"/> <input type="button" value="Run"/>

Below the table, there are three buttons: , , and . The 'Edit' and 'Run' buttons for the 'Approval History' report and the 'Copy', 'Delete', and 'New Report' buttons are circled in red in the original image.



### III. Report Descriptions by Category

#### Operations

- **Approval History:** Lists approval history of eRequisitions. Data returned will be limited to 40 days prior to the current date.
- **Catalog Vs. Non-Catalog Orders:** Displays total dollar amount of purchase orders and whether the items were selected from the catalog or entered ad-hoc. Data returned will be up to one year from yesterday's date.
- **Requisition Average Cycle Time Analysis:** Displays the average time it took to approve eRequisitions based on eRequisition total amount. Data returned will be limited to one year from yesterday's date.
- **Requisition Volume Over Time:** Displays total dollar amount of eRequisitions that have been submitted through NC E-Procurement. Data returned will be up to one year from yesterday's date.
- **Commodity Approvers by Entity:** If an entity utilizes approval groups based on commodity codes, this report displays the commodity codes requiring approval, the commodity approval group assigned to the commodity code, and the dollar threshold that must be exceeded to trigger the commodity approval rule.
- **CPO Approvers by Entity:** If an entity utilizes Chief Procurement Officer approval groups, this report displays the commodity codes requiring approval by a CPO, the CPO group assigned to the commodity code, and the dollar threshold that must be exceeded to trigger the CPO approval rule.
- **Financial Approvers by Entity:** If an entity utilizes Financial Approver approval groups, this report displays the cost centers requiring approval by a Financial Approver, the Financial Approver group assigned to the cost center, and the dollar threshold that must be exceeded to trigger the Financial Approver approval rule.
- **Purchasing Agent Approvers by Entity:** If an entity utilizes Purchasing Agent approval groups, this report displays the commodity codes requiring approval by a Purchasing Agent, the Purchasing Agent group assigned to the commodity code, and the dollar threshold that must be exceeded to trigger the Purchasing Agent approval rule.
- **User Group by Entity:** Displays all approval rule group properties for entities that utilize approval groups including the Financial Wildcard Approver.

#### Orders

- **Order Details:** Summarizes orders showing both header and line item information. Data returned will be limited to 90 days prior to the current date.
- **Order Details (Historical):** Summarizes purchase orders showing both header and line item information. Data returned will be up to two years prior to yesterday's date.
- **Order Details Extended:** Summarizes orders showing additional header and line item information, including Contract details, compared to the Order Details report. Data returned will be up to three years prior to yesterday's date.
- **Order Summary:** Summary of purchase orders submitted during some particular period. Data returned will be limited to 90 days prior to the current date.
- **Order Summary (Historical):** Summary of purchase orders submitted during some particular period. Data returned will be up to two years prior to yesterday's date.
- **Requisition Total, by Supplier:** Shows how purchases are divided between Suppliers. Data returned will be limited to one year prior to the current date.



### Receiving

- **Overdue Orders:** Lists the purchase orders that have not yet been marked as 'Received' and each respective 'Due-on Date.' Purchase orders that do not have a 'Due-on Date' set will be listed as due based on their date ordered. This allows a user to determine which items are overdue, but the NC E-Procurement report does not determine which items are overdue. Service items and Blanket purchase orders will not be included in this report. Data returned will be limited to one year prior to the current date.

### Requisition

- **Requisition Detail:** Summarizes a group of eRequisitions, showing both header and line item information. Data returned will be limited to 90 days prior to the current date.
- **Requisition Detail (Historical):** Summarizes a group of eRequisitions, showing both header and line item information. Data returned will be up to two years prior to yesterday's date.
- **Requisition Detail Extended:** Summarizes a group of requisitions, showing additional header and line item information, including Contract details, compared to the Requisition Detail report. Data returned will be up to three years prior to yesterday's date.
- **Requisitions to be Approved:** Lists eRequisitions that are waiting for approval. Data returned will be limited to one year prior to yesterday's date.
- **Requisition Summary:** Summary of eRequisitions submitted during a specified period of time. Data returned will be limited to 90 days prior to the current date.
- **Requisition Summary (Historical):** Summary of eRequisitions submitted during a specified period of time. Data returned will be up to two years prior to yesterday's date.

### Users

- **Groups By Entity:** Lists users by each Group in an Entity.
- **Management Chain:** Lists all users in an Entity, their management level and management chain. Data returned will reflect changes prior to the current date.
- **User By Entity:** Lists all active users in a selected Entity.
- **User By Entity No Supervisor:** Lists users in an Entity who do not have a supervisor.

**Note:** If one of the above reports does not provide the data for which you are looking, try conducting a System Search. System Searches are described in detail in the 'System Searches' Process Guide. If a System Search will also not provide the data for which you are looking, contact the NC E-Procurement Help Desk at 888-211-7440 option 1 or [ephelpdesk@its.nc.gov](mailto:ephelpdesk@its.nc.gov). Please have as many details as possible available when making your inquiry.