



Participation Report Guidelines

Each quarter, schools submit the following two reports to NC E-Procurement:

- I. Participation Report
- II. Expended Funds Report

I. Participation Report

SunPac

The participation report includes a summary of all purchase orders from Type A, Type B, and Type C purchases for SunPac Schools:

- Type A** – Non-NC E-Procurement Purchase Orders
- Type B** – Purchase Orders entered in SunPac to NC E-Procurement Vendors
- Type C** – Purchase Orders entered in NC E-Procurement

In order to review progress towards this goal, the participation report available within each LEA's purchasing system is submitted on a quarterly basis. The report should be emailed to eprocurement@its.nc.gov by the fifth business day of each fiscal quarter. The report is cumulative, therefore each quarter ran should include the previous quarter. For example, when the report is run for third quarter, it should include first, second, and third quarter numbers. If the report is submitted in the last quarter of the fiscal year, it should include first, second, third, and fourth quarters.

Steps to Run the Participation Report – SunPac

1. From the Main Menu, select **Option 4 (Purchasing)**
2. From the Purchasing Menu, select **Option 34 (Participation Report)**
3. In fields 1 and 2, enter the period range for the report
 - a. **Start Date:** 1
 - b. **End Date:** 3 for Q1, 6 for Q2, etc.
4. In field 4, enter the maximum number of suppliers to rank. We are currently asking that users rank their top 100; therefore, they should put **'100'** in this field
5. In field 8, Enter **'N'** to run the report or **'Y'** to run the report and save to PC
6. Field 9 will default to the SFFIN file **IF** the SFFIN file exists and holds the reports. If the reports go to another folder, then that folder will default here. This is ok. The user does not need to change this setting to SFFIN if something else appears here. This field shows the folder/location where the report will be saved
7. Once the information has been entered on this screen Press **'Enter'** on the keyboard to run the reports
8. Once the report is run the user will be taken back to the Purchasing Menu
9. To view the report, Enter **F18** from the Purchasing Menu
10. Enter 5 in the **'Opt'** field next to report you would like to view



11. Select the **'Page Down'** button to view the report
12. Press **'Enter'**

ISIS

The participation report for ISIS Schools includes a summary of all purchase orders from ISIS/Non-EP Vendors, ISIS/EP Vendors, and E-Procurement Vendors:

- ISIS/Non-EP Vendor** – Purchase Orders entered in ISIS to ISIS Vendors
- ISIS/EP Vendor** – Purchase Orders entered in ISIS to NC E-Procurement Vendors
- E-Procurement Vendor** - Purchase Orders entered in NC E-Procurement

In order to review progress towards this goal, the participation report available within each LEA's purchasing system is submitted on a quarterly basis. The report should be emailed to eprocurement@its.nc.gov by the fifth business day of each fiscal quarter. The report is cumulative, therefore each quarter ran should include the previous quarter. For example, when the report is run for third quarter, it should include first, second, and third quarter numbers. If the report is submitted in the last quarter of the fiscal year, it should include first, second, third, and fourth quarters.

Steps to run the Participation Report – ISIS

1. Access the **'Utilities'** Menu by entering **'99'** on the Main Menu
2. Select **Option 11 (E-Procurement Participation)**
3. Enter **Start Date**
4. Enter **End Date**

Note: For additional assistance on this report, please contact the ISIS Help Desk at 800-541-8999 option 2.



II. Expended Funds Report

Each LEA must also submit a copy of their expended funds report (to note expended funds) with the participation report each quarter to obtain an accurate assessment of their participation progress. At the end of each fiscal year, the participation report will be used in conjunction with the expended funds report to calculate participation percentages for the entire fiscal year. Please review the detailed steps on how to run both the Participation Report & Expended Funds Report.

Steps to Run the Expended Funds Report – SunPac

1. From the Main Menu, select **Option 2 (General Ledger)**
2. From the General Ledger screen, select **Option 40 (Ledger Report)**
3. Set the '**Start Date**' as beginning of Quarter 1 (i.e., 1 for Month 1)
4. Enter the '**End Date**' as the last month of the current Quarter (e.g., 4th quarter report would be Start Date 1 & End Date 12)
5. Enter Printer Name
6. Hit **F11** to Run Report

Steps to Run the Expended Funds Report – ISIS

1. From the Main Menu, access **General Ledger (Option 67)**
2. Select **Report Writer Option**
3. Each LEA will need to set up a query to fit the requirements

Note: For additional assistance on this report, please contact the ISIS Help Desk at 800-541-8999 option 2.

When should I submit the report?

In order to review progress towards this goal, the participation report, available within each LEA's purchasing system, is submitted on a quarterly basis.

Fiscal Year XX

Quarter 1	7/1/XX – 9/30/XX
Quarter 2	7/1/XX – 12/31/XX
Quarter 3	7/1/XX – 3/31/XX
Quarter 4	7/1/XX – 6/30/XX

The report should be emailed to eprocurement@its.nc.gov by the fifth business day of each fiscal quarter. The report is cumulative; therefore, each quarter that is run should include the previous quarter.

Where should I submit the report?

Reports can be emailed to eprocurement@its.nc.gov, or faxed to 919-424-1975.

Need help?

For additional assistance, please contact NC E-Procurement Help Desk at (888) 211-7440, select option 1 or via email at ephelpdesk@its.nc.gov if you have questions.