Reporting

Introduction

Utilizing the reporting functions in Sourcing or Contracts enables a user to quickly analyze key information based on the needs of the individual user or entity. Accessing and running reports is the same process within both Sourcing and Contracts.

Please 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.

Learning **Objectives**

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

- Understand how to run Prepackaged Reports.
- Understand how to run Public Reports.
- Understand how to run Background Reports.

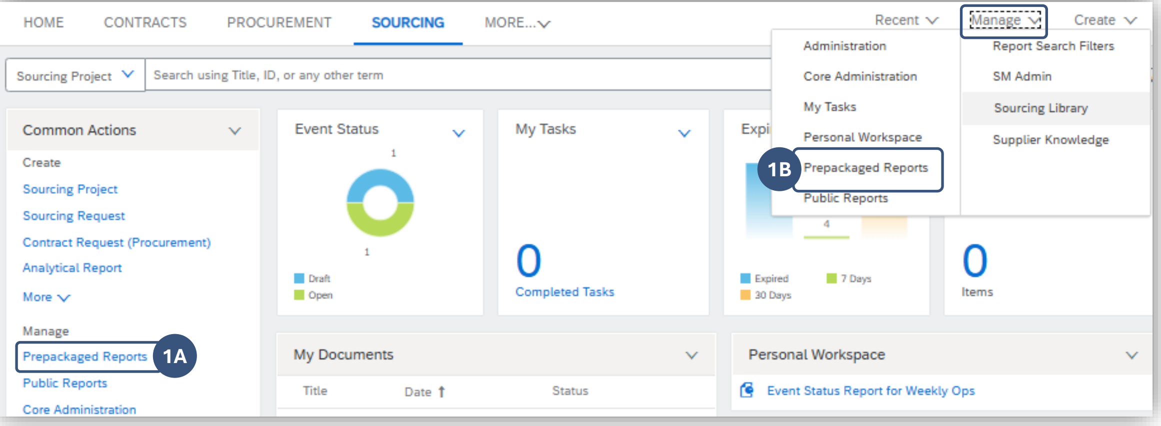
Reporting

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 Sourcing or Contracts Dashboard. The following example shows running a prepackaged report for Sourcing:

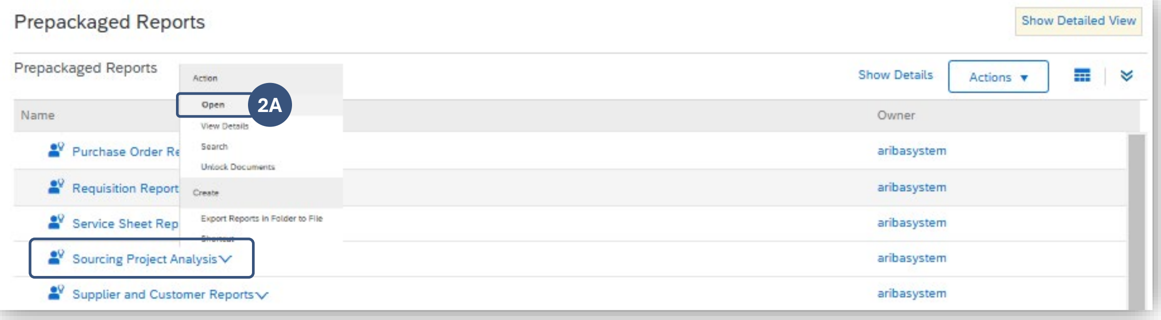
A. Under **Manage** on the **Common Actions** portlet, select **Prepackaged Reports**. Click on the **More** drop-down menu if **Prepacked Reports** does not immediately appear.

B. In the upper right, click on **Manage**, then select **Prepackaged Reports** from the drop-down menu.



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.

A. To view the reporting options available within each report type, click on the report **Name**, then select **Open** from the pop-up menu.



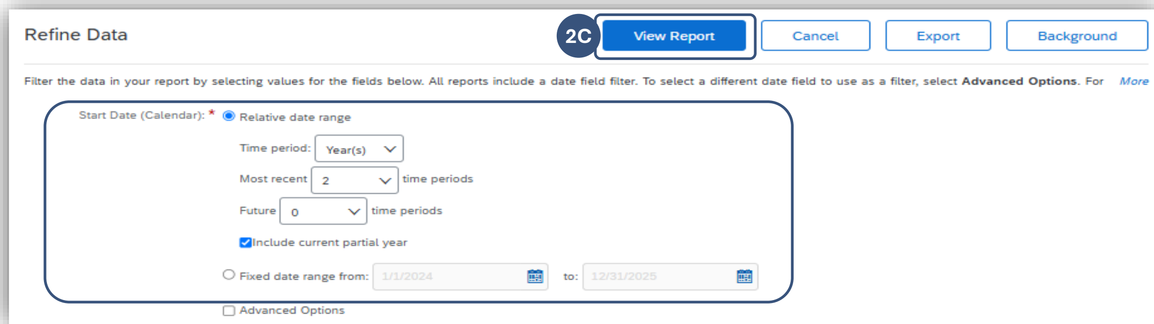
Some recommended **Prepackaged Reports** are **Contract Workspace (Procurement) Analysis** and **Contracts Task Analysis for Contracts**, and **Sourcing Project Analysis**, **Project Task Analysis**, and **Event Reports** for Sourcing.

- **Contract Workspace (Procurement)/Sourcing Project Analysis** reports are designed to provide visibility into an entity's souring and contract activity by supplier, commodity, owner, etc., and allow for entity-wide monitoring of contracts that are set to expire soon.
- **Contracts/Project Task Analysis** reports are designed to provide analysis of contract and sourcing project lifecycle and help identify process bottlenecks.
- **Event Reports** are designed to provide to provide an overview of Sourcing Events including for which commodities agencies are holding Events, and which suppliers are responding to bid opportunities and what their bidding behavior is.

Reporting

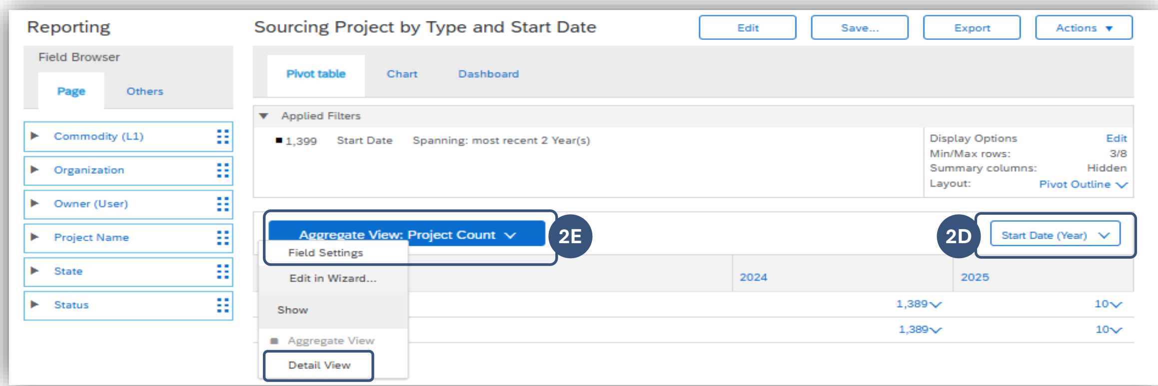
B. The next screen displays the reports available based on the previously selected report type. Choose a report to run by clicking on the report **Name** and selecting **Open** from the pop-up menu.

C. 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.



D. The **Reporting** page defaults to the **Aggregate view** of the report on the **Pivot table** tab. To see more possible details, click on a blue-framed button (For this particular report, it's **Start Date (Year)**, but the options will very by report).

E. To see a more detailed view of the report, click on **Aggregate view** and select **Detail View** from the drop-down.



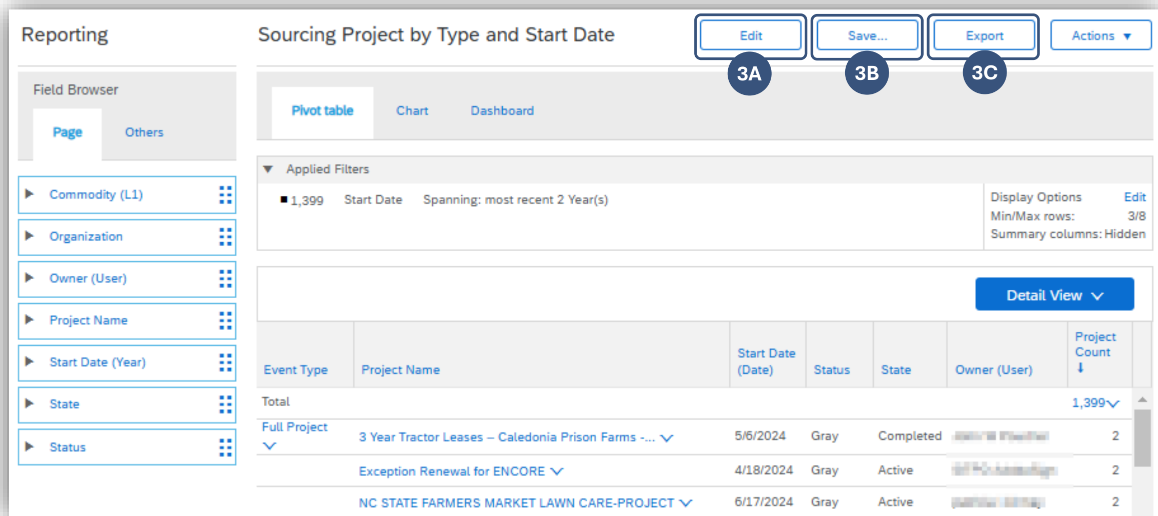
F. When **Detail View** is selected, additional columns and data will appear, such as **Project Name, Start Date,** and **State**.

Reporting

3 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 users **Personal Workspace**.
- **C. Export**: Export the data to an MS Excel Template for further data analysis.

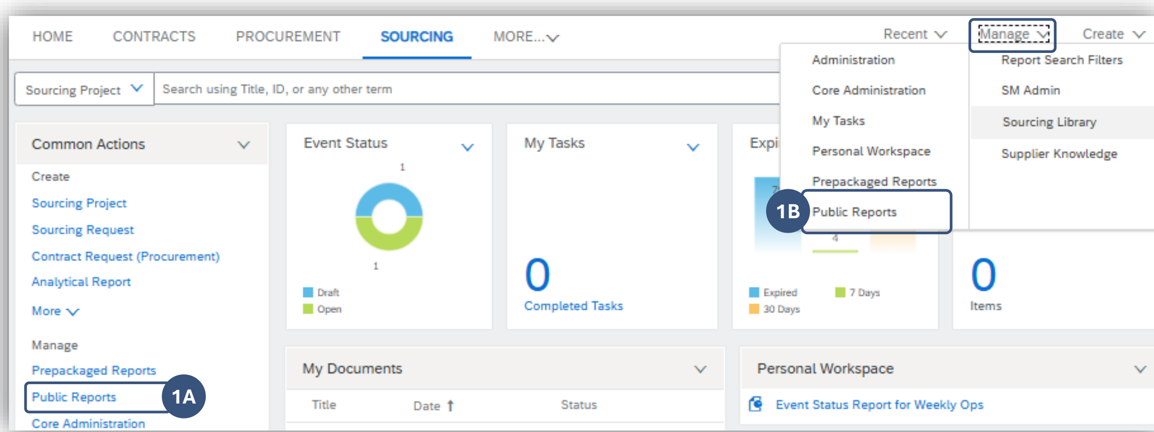
> Exporting reports is the suggested method of viewing reporting data.



Running Public Reports

1 While **Prepackaged Reports** are standard reports in the system, **Public Reports** are custom reports by the NC eProcurement team that have been made available to all reporting enabled users and may be more applicable to State of North Carolina users than **Prepackaged Reports**. **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 Sourcing or Contracts Dashboards. The following example shows running a prepackaged report for Sourcing:

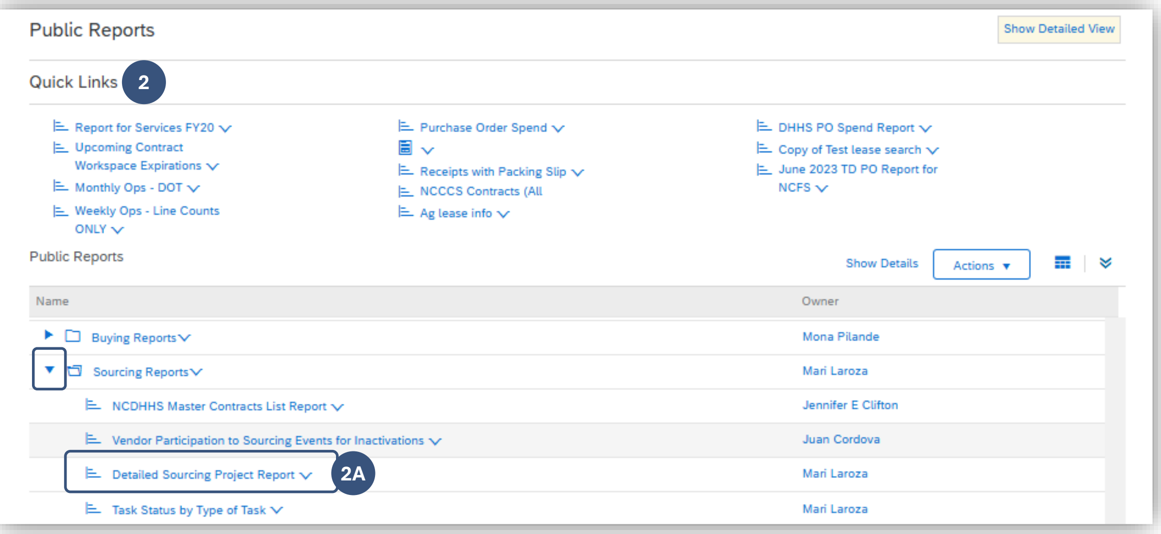
- **A.** Under **Manage** on the **Common Actions** portlet, select **Public Reports**. Click on the **More** drop-down menu if **Public Reports** does not immediately appear.
- **B.** In the upper right, click on **Manage**, then select **Public Reports** from the drop-down menu.



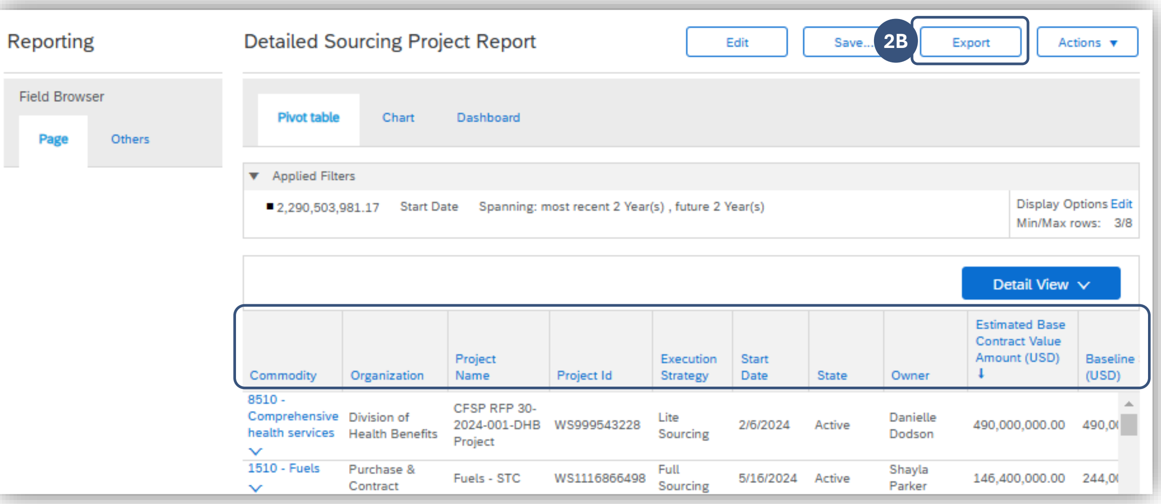
Reporting

2 On the **Public Reports** page, the default view lists the report type alphabetically by **Name**, with the **Owner** (always **aribasystem**) listed to the right. There is also a **Quick Links** section at the top.

A. Select the applicable report from the list of **Public Reports** and click **Open**.



B. Use the column headers to filter the results specific to your Agency or **Export** the data for further manipulation in Excel.



Running Background Reports

1 Users can schedule reports to run automatically – in the **Background** – even without being logged into NC eProcurement Sourcing or NC eProcurement Contracts at the time. Use scheduled reporting for:

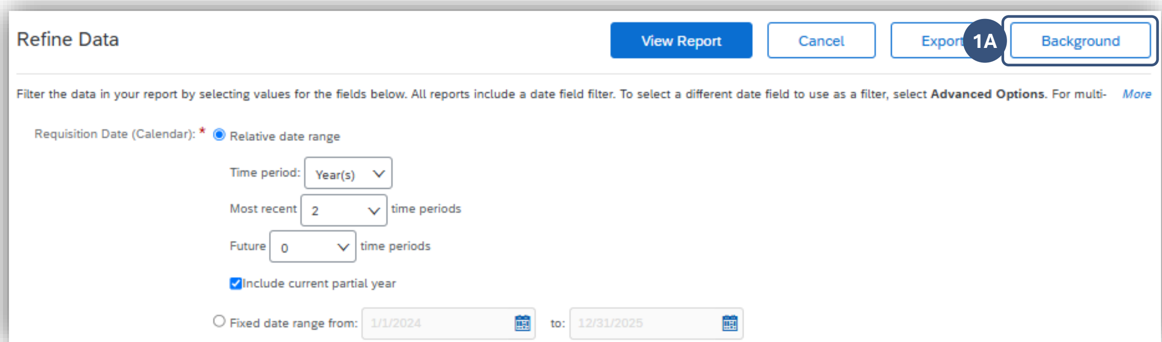
- **Hands-off reporting**: Once a report is scheduled in the background, users do not have to be logged into NC eProcurement Contracts or Sourcing when it runs. Reports can also be scheduled to run at regular intervals on a daily, weekly, or monthly basis.

- **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 or Sourcing 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.

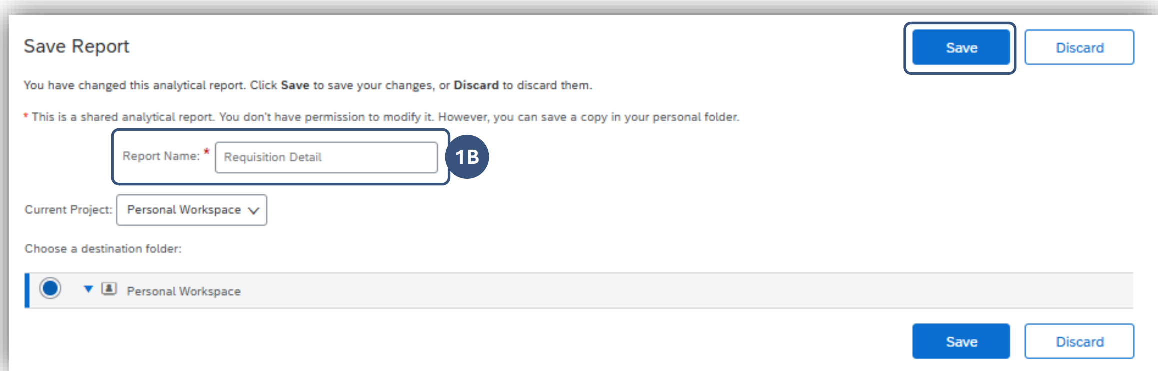
To schedule a **Background** report, follow these steps after selecting a specific report:

A. On the **Refine Data** page, filter the data as desired and click **Background**.

> Clicking **Run In Background** from the pop-up menu when selecting a report will also initiate a **Background Report**. 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.



B. 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**.



C. 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.

D. In the **Report Details** section of the page, the user can set the following:

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

E. 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.

The **Run once for each period of:** field in the **Schedule** section is the best way to schedule a report to automatically run repeatedly.