

NC eProcurement Reporting

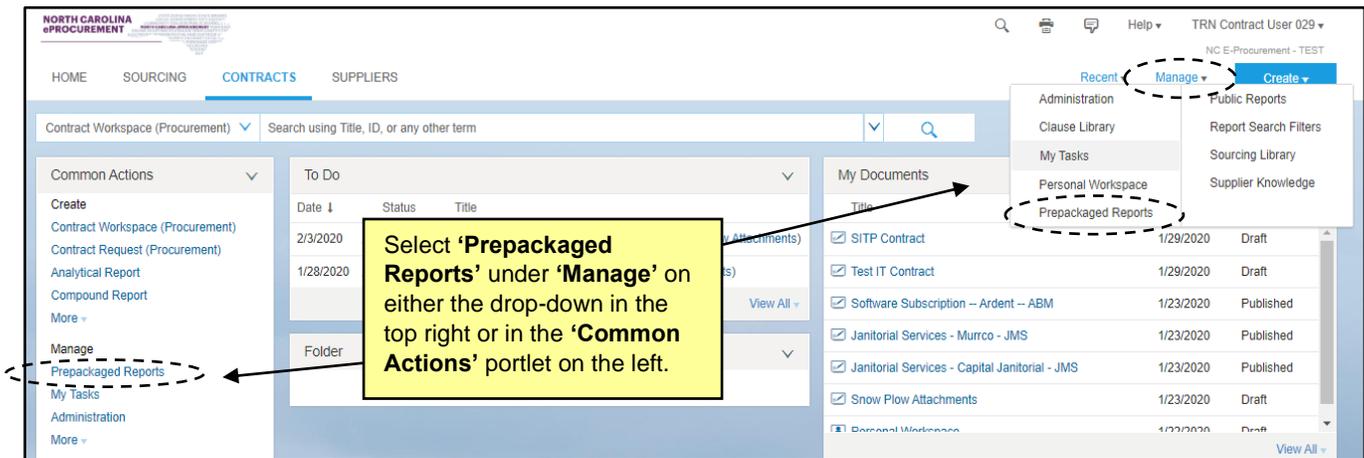


Reporting is an important component in the Contracts process. Utilizing the reporting functions in Contracts enables a user to quickly analyze key information based on the needs of the individual user or entity.

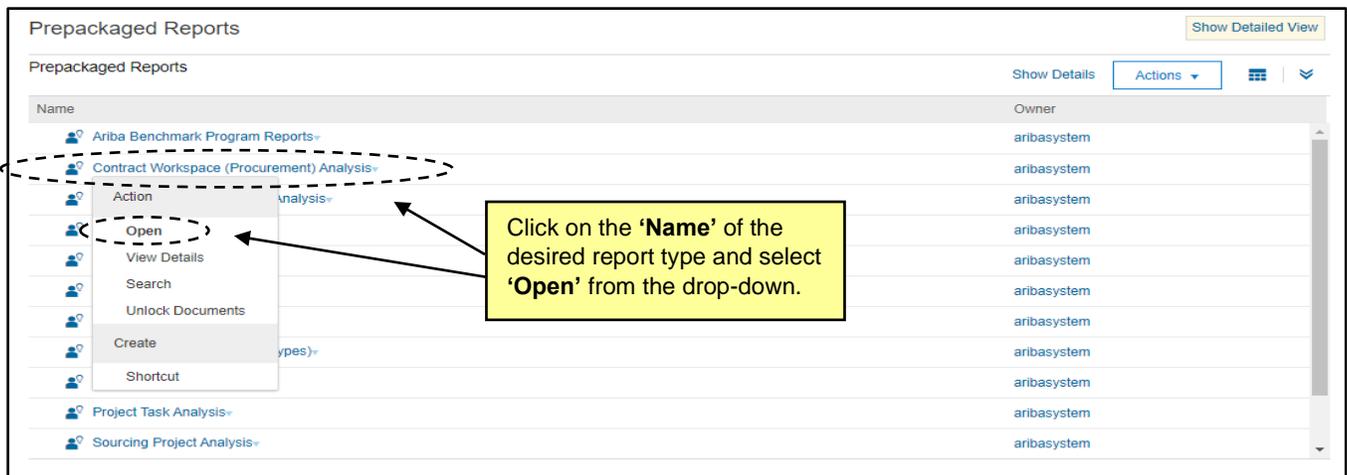
Note: Reporting data is pulled at intervals rather than in real time. It might take up to 24 hours for the data from your latest transactions to display in reports.

I. 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 Contracts Dashboard:
 - a. Under **'Manage'** on the **'Common Actions'** portlet, select **'Prepackaged Reports.'** Click on the **'More'** drop-down menu if Prepackaged Reports does not immediately appear.
 - b. In the upper right, select the **'Manage'** drop-down menu, then select **'Prepackaged Reports.'**



2. On the **'Prepackaged Reports'** page, the default view lists the report type alphabetically by Name, with the Owner (always **'aribasystem'**) listed to the right. To view the reporting options available within each report type, click on the report name, and then select **'Open'** from the Action drop-down menu.



Note: Two recommended ‘Prepackaged Reports’ are those for ‘Contract Workspace (Procurement) Analysis’ and ‘Contracts Task Analysis.’

- a. ‘Contract Workspace (Procurement) Analysis’ reports are designed to provide visibility into an entity’s contract activity by supplier, commodity, owner, etc., and allow for entity-wide monitoring of contracts that are set to expire soon.
 - b. ‘Contracts Task Analysis’ reports are designed to provide analysis of contract project lifecycle and help identify process bottlenecks.
3. 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 Action menu.
 4. 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.

The screenshot shows the 'Refine Data' interface. At the top right, there are buttons for 'View Report', 'Cancel', 'Export', and 'Background'. The 'View Report' button is circled in red. Below the buttons, there is a text prompt: 'Filter the data in your report by selecting values for the fields below. All reports include a date field filter. To select a different date field to use as a filter, select **Advanced** More'. The filter fields include: Region (L1): (All), State: Active, Contract Status: (All), Related ID: (All), Common Supplier: (All), and Start Date (Calendar): * Relative date range. Under 'Relative date range', there are options for 'Time period: Year(s)', 'Most recent: 2 time periods', and 'Future: 0 time periods'. There is also a checkbox for 'Include current partial year' and a 'Fixed date range from: 1/1/2019 to: 12/31/2020' section. A yellow callout box with a black border contains the text: 'On the ‘Refine Data’ page, set the filters to the desired settings and click ‘View Report’ to generate the report. Note: ‘Region’ is a default field but should not pertain to the way the State uses NC eProcurement Contracts.'

5. The ‘Reporting’ page defaults to the ‘Aggregate’ view of the report on the ‘Pivot table’ tab. To see more details, click the blue button (For this particular report, it’s the ‘Data’ button, but for other reports the button may have a different name) and select ‘Detail View’ from the drop-down.

The screenshot shows the 'Reporting' page with a table. The table has columns for 'Project Count' and 'Start Date (Year)'. The 'Project Count' column shows '2020' and '3'. The 'Start Date (Year)' column shows '4,500,002.00-'. A yellow callout box with a black border contains the text: 'Click on ‘Data’ and select ‘Detail View’ to see more information about the items in the report.' The 'Data' button is circled in red, and the 'Detail View' option in the dropdown menu is also circled in red.

Project Count	Start Date (Year)
2020	4,500,002.00-
3	4,500,002.00-
3	4,500,002.00-
1	1,500,001.00-
1	1,500,001.00-
1	1,500,000.00-

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

More specific data is displayed under additional columns on the **'Detail View.'**

Owner (User)	Project Name	Project Name	Start Date (Date)	Status	State	Owner (User)	Project Count	Contract Amount (USD)	
Total								3	4,500,002.00
Agency Contract Admin 3	UAT Agency Non IT Goods-Carpet-Modification...	UAT Agency Non IT Goods-Carpet-Modification...	1/15/2020	Gray	Active	Agency Contract Admin 3	1	1,500,001.00	
	UAT Agency Non IT Goods-Carpet-Modification...	UAT Agency Non IT Goods-Carpet-Modification...	1/15/2020	Gray	Active	Agency Contract Admin 3	1	1,500,001.00	
	UAT1 Agency Non-IT Goods	UAT1 Agency Non-IT Goods	1/13/2020	Gray	Active	Agency Contract Admin 3	1	1,500,000.00	

7. 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 user's **'Personal Workspace.'**
- c. **Export:** Export the data to an **'MS Excel'** Template for further data analysis.

Users can also review the data visually on the **'Chart'** tab or add the report onto their own **'Dashboard'** by navigating to the **'Dashboard'** tab and clicking **'Add to Dashboard.'**

Users can **'Edit,' 'Save,'** or **'Export'** the details of the report.

Users can click on the **'Chart'** tab to display the data visually, or add the report to their **'Dashboard'** from the **'Dashboard'** tab.

Owner (User)	Project Name	Project Name	Start Date (Date)	Status	State	Owner (User)	Project Count	Contract Amount (USD)	
Total								3	4,500,002.00
Agency Contract Admin 3	UAT Agency Non IT Goods-Carpet-Modification...	UAT Agency Non IT Goods-Carpet-Modification...	1/15/2020	Gray	Active	Agency Contract Admin 3	1	1,500,001.00	
	UAT Agency Non IT Goods-Carpet-Modification...	UAT Agency Non IT Goods-Carpet-Modification...	1/15/2020	Gray	Active	Agency Contract Admin 3	1	1,500,001.00	
	UAT1 Agency Non-IT Goods	UAT1 Agency Non-IT Goods	1/13/2020	Gray	Active	Agency Contract Admin 3	1	1,500,000.00	

II. Running Background Reports

Users have the ability to schedule reports to run automatically – in the **'Background'** – even without being logged into 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 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 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:

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

Note: 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.

Refine Data

View Report Cancel Export **Background**

Filter the data in your report by selecting values for the fields below. All reports include a date field filter. To select a different date field to use as a filter, select [Advanced](#) [More](#)

Region (L1): (All) ▾

State: Active ▾

Contract Status: (All) ▾

Related ID: (All) ▾

Common Supplier: (All) ▾

Start Date (Calendar): * Relative date range

Time period: Year(s) ▾

Most recent 2 ▾ time periods

Future 0 ▾ time periods

Include current partial year

Fixed date range from: 1/1/2019 to: 12/31/2020

On the **'Refine Data'** page, set the filters to the desired settings and click **'Background'** to begin the process of scheduling the report.

Note: **'Region'** is a default field but should not pertain to the way the State uses NC eProcurement Contracts.

2. 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.'**
3. 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.
4. In the **'Report Details'** section of the page, the user can set the following:
 - a. **'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.

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

The screenshot shows the 'Schedule Background Report: Active Contract Requests By Owner' form. The 'Schedule' section is circled in red and includes radio buttons for 'None', 'Run once as soon as possible', 'Run once on: 2/12/2020 3:29 PM', and 'Run once for each period of: 1 Week(s) on: Sunday at this time: 3:00 AM'. The 'Report Details' section is also circled in red and includes a dropdown for 'Number of days or runs to keep: 3', a checkbox for 'Attach report to notification email', a dropdown for 'Recipient users: (select a value) [select]', and a text area for 'Recipient email addresses:'. A yellow callout box with a black border contains the text: 'On the 'Schedule Background Report' page, set the reporting schedule in the 'Schedule' section, and set the recipient information in the 'Report Details' section. Click 'Save' and the report will run when scheduled.' Arrows point from the callout box to the 'Schedule' and 'Report Details' sections. A 'Save' button is circled in red in the top right corner.

- 5. 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.