

NC Department of Information Technology

RV301: IT Procurement Dashboard Training

Revised November 2023



Content

This document provides NCDIT Reviewers with guidance on the contents of the IT Procurement Dashboard and how to review the various reports to gain insights to the IT procurement process.

- Overview of IT Procurement Dashboard
- How to review reports and gain insights
- How to request access to IT Procurement Dashboard



Learning Objectives

After reviewing this document, you should be able to do the following:

- Understand the reports included in the IT Procurement Dashboard
- Know how to review and obtain insights from the various reports in the IT Procurement Dashboard
- Know how to request access to the IT Procurement Dashboard



Content

This document provides training on the overall IT Procurement Dashboard and its individual reports to help NCDIT stakeholders monitor and manage the IT procurement process.

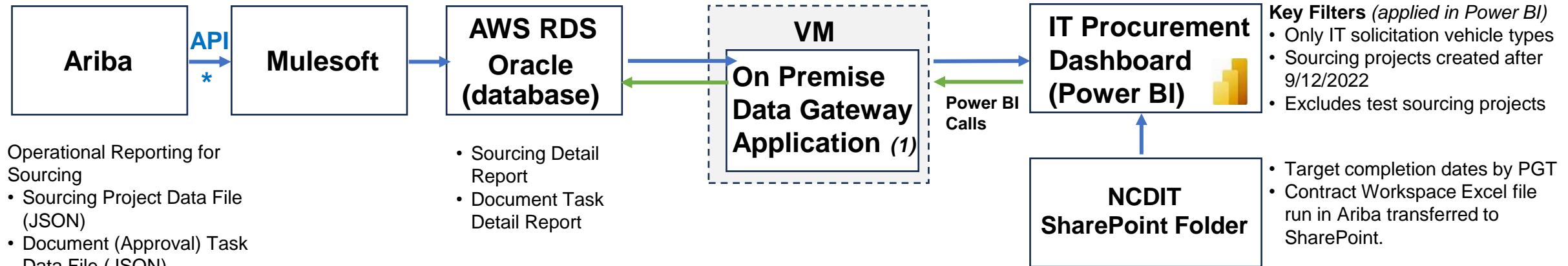
- IT Procurement Dashboard Overview
- Number of IT Sourcing Projects Report
- Number of Open Approval Tasks Report
- Open Approval Tasks Analysis Report
- Completed Approval Task Cycle Time Report
- Completed Approval Task Cycle Time Trend Report
- Exception Request Completed Approval Cycle Time Report
- Completed Approval Decision Outcome Report
- Target versus Actual Contract Award Date Report
- Completed IT Sourcing Projects Report
- Overall IT Sourcing Project Cycle Time Report
- IT Sourcing Project Cycle Time by Step Report
- IT Sourcing Projects Status Report
- Approval Cycle Time by IT Sourcing Project Report
- Completed IT Contract Amendment, Renewal, Termination Letter Report

IT Procurement Dashboard Overview (1 of 2)

Preliminary

The IT Procurement Dashboard is based in Power BI and leverages data captured in the NC eProcurement System to produce specific reports that help provide insights into the IT Procurement Process.

Important Caveat: The IT Procurement Dashboard Reports are only as accurate and complete as the data entered into the NC eProcurement Sourcing and Contracts Tools by Project Owners. Gaps in entered data will impact accuracy and usefulness of the IT Procurement Dashboard.



* The two data files in Ariba are automatically sent to Power BI twice a day to update the IT procurement dashboard.

(1) Managed by Enterprise Collaboration Services

Access to the IT Procurement Dashboard is limited to NCDIT-approved users and requires users to have a Power BI Pro license.

IT Procurement Dashboard Link: [IT Procurement Dashboard V1 - Power BI \(powerbigov.us\)](https://powerbigov.us)

Number of IT Sourcing Projects Report
 Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

Procurement Type Organization	IT: Exception Request Only				IT: IFB				IT: RFP				IT: RFQ		
	Active	Cancelled	Completed	Total	Active	Cancelled	Completed	Total	Active	Cancelled	Completed	Total	Active	Cancelled	Complete
Broughton Hospital															2
Department of Administration	4			4		1		1						1	
Department of Adult Correction	4			4	2			2	2				2	4	
Department of Agriculture	1	1		2										3	
Department of Commerce		2		2										1	
Department of Environmental Quality	1	1		2										1	
Department of Information Technology	2			2	1			1	2	1			3	1	
Department of Insurance	6			6										1	1
Department of Justice	1			1											1
Department of Labor	1		1	2											
Department of Natural and Cultural Resources	1		1	2					2		1		3	15	6
Department of Public Instruction	14	3	27	44	1			1	4	1			5	6	
Department of Public Safety	6	2		8	3	1	1	5	3				3	4	
Department of Revenue	1			1	1			1	1				1	1	
Department of State Treasurer	2			2	1			1	1				1		
DIT Purchasing	4		1	5	1			1	1				1		1
Division of Central Administration	2		1	3	5			5						1	
Division of Child and Family Well-Being									1				1		
Division of Child Development														1	
Division of Employment Security	1			1	1			1						1	
Division of Health Benefits	2			2											
Division of Mental Health & Substance Abuse Services	2			2										1	
Division of Public Health	2			2					1				1	1	
Division of Social Services	1			1					1				1		
Total	74	11	44	129	19	2	3	24	34	2	1	37	11	5	

Individual Reports are listed on Pages

Reports can be exported to PDF to share with other audiences as applicable

Selecting non-total cells in a report and then selecting the 'Details' button (where available) will show details of Sourcing Projects behind the number (e.g., Project ID, Project Name, Project Owner)

Users may need to use scroll bar to view entire report

Number of IT Sourcing Projects Report

Preliminary

Report Purpose: This report provides a count of Sourcing Projects by organization to help NCDIT understand adoption and usage of the NC eProcurement Sourcing Tool for IT procurements. It includes details of the solicitation type and status of the Sourcing Projects.

Number of IT Sourcing Projects Report

Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

Procurement Type Organization	IT: Exception Request Only				IT: IFB				IT: RFP			IT: RFQ			IT: SOW		Total
	Active	Cancelled	Completed	Total	Active	Cancelled	Completed	Total	Active	Cancelled	Total	Active	Cancelled	Total	Active	Total	
Department of Natural and Cultural Resources	2			2					3		3	11	1	12			17
Department of Public Instruction	7	1		8					3	1	4	2		2			14
Department of Public Safety	4			4	1	1	1	3				2		2			9
Department of Insurance	5		1	6								2		2			8
NC Health & Human Services					3			3	2		2	3		3			8
NC Community College System Office	1			1					2		2	3		3			6
Department of Information Technology	1			1					2		2	1		1			4
Division of Central Administration					2			2				2		2			4
Office of the State Controller	2			2					2		2						4
Department of Revenue	1			1	1			1	1		1						3

Detail



Users can select an intersection in the table above and click the **Details** button to see the Sourcing Projects that make up the total.

Potential Review Points

- Are all state agencies that are expected to be using the Sourcing Tool using the Sourcing Tool?
- What were the root cause of any Cancelled Sourcing Projects?

Number of Open Approval Tasks Report

Preliminary

Report Purpose: This report provides a summary of the open approval tasks by Reviewer Group, showing the number of approvals that have been open in three, pre-defined workday ranges (e.g., excludes weekends and holidays).

Number of Open Approval Tasks Report

Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

7
0 to 5 Workdays
2
6 to 10 Workdays
2
11 or More Workdays

Organization	NCDIT Enterprise Architecture	NCDIT ESRMO	SITP Legal	Statewide DOJ Legal	Statewide IT Procurement Office	Total
Department of Natural and Cultural Resources			1	3	1	5
0 to 5 Workdays				3		3
6 to 10 Workdays			1		1	2
Department of Insurance	1	1			1	3
0 to 5 Workdays	1	1				2
11 or More Workdays					1	1
Department of Public Safety	1	1		1		3
0 to 5 Workdays	1	1				2
11 or More Workdays				1		1
Total	2	2	1	4	2	11

Detail



Users can select an intersection in the table above and click the Details button to see the Sourcing Projects that make up the total.

Potential Review Points

- Where have approval tasks been open for 11 or more workdays (shaded red), and are there any trends by Reviewer Group or by State Agency?
- Where have approval tasks been open between 6 and 10 workdays (shaded yellow), and does Reviewer Group plan to provide approval decision soon?

Open Approval Tasks Analysis Report

Preliminary

Report Purpose: This report provides the details of the open approval tasks, showing the open approvals in descending number of working days they have been open order.

Open Approval Tasks Analysis Report

Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

Project Owner: All
Approver Group: All
Organization: All

Organization	Sourcing Project / Contract Workspace Name	Project ID	Solicitation Vehicle	Project Owner	Task Name	Approver Name	Activation Date	Reviewer Group	Number of Workdays Outstanding
Black Mountain Neuro-Medical Treatment Center	DSOHF BMNTC PBX Exception Request	WS863563391	IT: Exception Request Only	Rachel H Freeman	Submit Security Exception Request to NCDIT (if applicable)	Procurement Guidance Team	10/19/23	Procurement Guidance Team	4
Department of Administration	OmniBallot Absentee Balloting Portal	WS721678751	IT: RFQ	Sandra L Bryant	Submit Draft Award Recommendation and Leading Vendor Proposal(s) to NCDIT for Review	NCDIT Enterprise Architecture	10/23/23	NCDIT Enterprise Architecture	2
	Server Refreshes Extended Support for DOA	WS868699943	IT: Exception Request Only	Rachel H Freeman	Submit Security Exception Request to NCDIT (if applicable)	Procurement Guidance Team	10/23/23	Procurement Guidance Team	2
Department of Adult Correction	Legal Mail and General Document Mgmt System Project	WS863213162	IT: IFB	Kimberly S Bruske	Gain NCDIT Approval of Solicitation Document and Sourcing Event	Procurement Guidance Team	10/19/23	Procurement Guidance Team	4
					Submit IT Procurement Intake Form to NCDIT Reviewers for Approval	NCDIT EPMO	10/17/23	NCDIT EPMO	6

Report filters help users find specific information faster. NOTE: Users may need to clear out existing filter selections to see all rows.

Users may need to use scroll bar to view all listed tasks

Potential Review Points

- For approval tasks that have been open over 5 workdays, what are the issues (if any) that need to be addressed in order for the approval decision to be made in the next few workdays?
- **NOTE:** This report can be filtered by Project Owner, Approver Group, and / or by Organization (using filters in red highlight box) to allow users to adjust displayed open approval tasks based on their information needs.

Completed Approval Task Cycle Time Report

Report Purpose: This report shows the trend in number of completed approval tasks and average approval cycle times by Reviewer Group for all approval tasks combined to help NCDIT monitor and manage the approval performance and staffing across Reviewer Groups.

Completed Approval Task Cycle Time Report

Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

Year	2022					2023				Total
	Reviewer Group	September	October	November	December	Total	January	February	March	
Agency CIO										
# of Approval Tasks							1	13	7	21
Average Workdays							4.0	3.4	12.1	6.3
Min Workdays							4	1	8	1
Max Workdays							4	10	17	17
Agency IT Security										
# of Approval Tasks	1	3				4	1	11	2	14
Average Workdays	1.0	10.0				7.0	1.0	1.9	3.5	2.1
Min Workdays	1	8				1	1	1	1	1
Max Workdays	1	12				12	1	7	6	7
DSOHF Purchasing Manager										
# of Approval Tasks								1		1
Average Workdays								1.0		1.0
Min Workdays								1		1
Max Workdays								1		1
NCDIT Enterprise Architecture										
# of Approval Tasks	2	6	4	6	18	1	15	2	18	36
Average Workdays	6.5	5.5	3.5	5.5	5.2	4.0	5.3	2.0	4.8	5.0
Min Workdays	3	2	1	1	1	4	2	1	1	1
Max Workdays	10	8	8	10	10	4	11	3	11	11

Potential Review Points

- Are there any outliers when looking at the Maximum Workdays values for each Reviewer Group that may warrant further investigation / understanding?
- Are there any non-standard Reviewer Groups listed that warrant further investigation or user training?
- Are the number of approvals per Reviewer Group per month changing significantly that may warrant a review of staffing levels to match changes in demand?

Detail



Users can select an intersection in the table above and click the Details button to see the Sourcing Projects that make up the total.

Completed Approval Task Cycle Time Trend Report

Preliminary

Report Purpose: This report shows the trend in average approval cycle times by Reviewer Group to help NCDIT monitor and manage the approval performance across Reviewer Groups and to determine / adjust service level objectives in the future.

Completed Approval Task Cycle Time Trend Report

Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

Year	2022					2023					Total	
	September	October	November	December	Total	January	February	March	April	May		Total
Agency CIO												
# of Approval Tasks						1	13	22	21	20	77	77
Average Workdays						4.0	3.4	6.7	4.1	4.6	4.9	4.9
Agency IT Security												
# of Approval Tasks	1	3			4	1	17	32	47	16	113	117
Average Workdays	1.0	10.0			7.0	1.0	1.7	7.4	5.1	7.6	5.6	5.6
Agency Procurement												
# of Approval Tasks										2	2	2
Average Workdays										18.5	18.5	18.5
DSOHF Purchasing Manager												
# of Approval Tasks							1				1	1
Average Workdays							1.0				1.0	1.0
NCDIT Enterprise Architecture												
# of Approval Tasks	2	7	4	6	19	2	20	35	53	18	128	147
Average Workdays	6.5	5.4	3.5	5.5	5.2	3.5	4.8	2.4	2.9	3.7	3.2	3.4
NCDIT Enterprise Operations												
# of Approval Tasks							2	22	46	12	82	82
Average Workdays							1.0	1.4	1.7	2.0	1.7	1.7
NCDIT EPMO												
# of Approval Tasks		2	1	1	4	5	30	50	71	23	179	183
Average Workdays		3.0	2.0	1.0	2.3	1.6	3.7	1.9	2.5	2.0	2.5	2.5

Potential Review Points

- Are there any average approval cycle times that are increasing over time for a Reviewer Group that warrant further investigation?
- What are the differences in average approval cycle times across Reviewer Groups, and do they make sense?

Detail



Users can select an intersection in the table above and click the Details button to see the Sourcing Projects that make up the total.

Exception Request Completed Approval Cycle Time Report

Preliminary

Report Purpose: This report shows completed approval tasks and average approval cycle times by Reviewer Group for only Exception Request approval tasks to help NCDIT monitor and manage the Exception Approval Process across Reviewer Groups.

Exception Request Approval Cycle Time Report

Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

Standards Exception Request Security Exception Request

Approver Group	
Agency IT Security	
# of Approval Decisions	4
Average Workdays	7.00
Minimum Workdays	1
Maximum Workdays	12
NCDIT Enterprise Architecture	
# of Approval Decisions	3
Average Workdays	3.33
Minimum Workdays	3
Maximum Workdays	4
NCDIT ESRMO	
# of Approval Decisions	3
Average Workdays	4.00
Minimum Workdays	3
Maximum Workdays	5
NCDIT IAM Operations	
# of Approval Decisions	3
Average Workdays	4.00
Minimum Workdays	1
Maximum Workdays	8
# of Approval Decisions	13
Average Workdays	4.58
Minimum Workdays	1
Maximum Workdays	12

Approver Group	
Agency IT Security	
# of Approval Decisions	2
Average Workdays	1.0
Min Workdays	1
Max Workdays	1
NCDIT Enterprise Operations	
# of Approval Decisions	1
Average Workdays	1.0
Min Workdays	1
Max Workdays	1
NCDIT EPMO	
# of Approval Decisions	1
Average Workdays	2.0
Min Workdays	2
Max Workdays	2
NCDIT ESRMO	
# of Approval Decisions	2
Average Workdays	1.5
Min Workdays	1
Max Workdays	2
# of Approval Decisions	6
Average Workdays	1.3
Min Workdays	1
Max Workdays	2

Detail



Potential Review Points

- Are the average actual approval cycles times for each Reviewer Group in the expected range?
- Are there any outliers when looking at the Maximum Workdays values for each Reviewer Group that may warrant further investigation / understanding?

Users can select an intersection in the table above and click the Details button to see the Sourcing Projects that make up the total.

Completed Approval Decision Outcome Report

Report Purpose: This report lists the total number of approval and denial task decisions made by each Reviewer Group and breaks down the percentage of approval and denial decisions to help identify areas where additional training or guidance is needed for one or all State Agencies.

Completed Approval Decision Outcome Report

Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

Reviewer Group	# of Approval Tasks	# of Approvals	% of Approvals	# of Denials	% of Denials
Agency CIO	21	20	95%	1	5%
Submit Draft Solicitation Document for Agency Approval	21	20	95%	1	5%
Agency IT Security	18	15	83%	3	17%
Submit Security Exception Request to NCDIT (if applicable)	2	2	100%		
Submit Standards Exception Request to NCDIT (if applicable)	16	13	81%	3	19%
DSOHF Purchasing Manager	1	1	100%		
Gain DHHS Procurement Manager Approval of Sourcing Event	1	1	100%		
NCDIT Enterprise Architecture	36	28	78%	8	22%
Gain NCDIT Approval of Solicitation Document and Sourcing Event	21	14	67%	7	33%
Submit IT Procurement Intake Form to NCDIT Reviewers for Approval	1	1	100%		
Submit Standards Exception Request to NCDIT (if applicable)	14	13	93%	1	7%
NCDIT Enterprise Operations	2	2	100%		
Submit Security Exception Request to NCDIT (if applicable)	1	1	100%		
Submit Standards Exception Request to NCDIT (if applicable)	1	1	100%		
NCDIT EPMO	47	43	91%	4	9%
Gain NCDIT Approval of Solicitation Document and Sourcing Event	6	4	67%	2	33%
Submit IT Procurement Intake Form to NCDIT Reviewers for Approval	36	34	94%	2	6%
Submit Security Exception Request to NCDIT (if applicable)	1	1	100%		
Submit Standards Exception Request to NCDIT (if applicable)	4	4	100%		

Potential Review Points

- Do any of the Reviewer Groups have % of Denials that are higher than 25% (taking into consideration number of overall reviews) that may warrant further investigation to determine if additional training / guidance is needed for one or all State Agencies?
- Are there any specific approval tasks that seem to have a higher % of Denial across the Reviewer Groups that may indicate need for clear instructions, training, or documentation?

Detail



Users can select an intersection in the table above and click the Details button to see the Sourcing Projects that make up the total.

Target versus Actual Contract Award Date Report

Report Purpose: This report provides the number of working days between the Target Contract Award Date and the Actual Contract Award Date to help understand if Sourcing Projects are being completed within targeted timeframes.

Target versus Actual Contract Award Date Report

Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

Organization	IT: Exception Request Only	IT: IFB	IT: RFP	IT: RFQ	IT: SOW
Broughton Hospital					
Average of Days				10.1	
Min of Days				1.0	
Max of Days				22.0	
Department of Administration					
Average of Days	7.3	3.3			
Min of Days	4.0	1.0			
Max of Days	13.0	6.0			
Department of Adult Correction					
Average of Days	8.9	5.4	6.5	25.1	
Min of Days	3.0	3.0	2.0	1.0	
Max of Days	19.0	7.0	10.0	52.0	
Department of Agriculture					
Average of Days	11.4			4.2	
Min of Days	2.0			2.0	
Max of Days	27.0			7.0	
Department of Commerce					
Average of Days				6.3	
Min of Days				2.0	
Max of Days				10.0	
Department of Environmental Quality					
Average of Days	6.4			22.3	
Min of Days	3.0			3.0	
Max of Days	7.0			33.0	
Department of Information Technology					
Average of Days			5.5	3.8	
Min of Days			2.0	2.0	
Max of Days			17.0	5.0	

*Positive workday numbers indicate Actual Award Date was after Target Award Date, and negative workday numbers indicate Actual Award Date was before Target Award Date

Organization

All

Report filter helps users find specific information faster

Potential Review Points

- Are Contracts being actually awarded on or before the initially targeted award date (negative numbers would indicate actual award dates are ahead of target award dates)?
- Are there any trends by State Agency or Solicitation Vehicle types where Contracts are being awarded after the initially targeted award date?

Completed IT Sourcing Projects Report

Report Purpose: This report provides a summary of the number of completed Sourcing Projects by State Agency by Solicitation Vehicle type to help NCDIT understand usage of the NC eProcurement Sourcing Tool for IT procurements.

Completed IT Sourcing Projects Report

Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

Organization	IT: Exception Request Only	IT: IFB	IT: RFP	IT: RFQ	IT: SOW	Total
Department of Administration						
Number of Completed IT Sourcing Projects	5					5
Estimated Total IT Contract Values for Completed IT Sourcing Projects	\$258,241					\$258,241
Department of Adult Correction						
Number of Completed IT Sourcing Projects	12		1	3		16
Estimated Total IT Contract Values for Completed IT Sourcing Projects	\$278,496		\$3,000,000	\$252,341		\$3,530,837
Department of Agriculture						
Number of Completed IT Sourcing Projects	2			1		3
Estimated Total IT Contract Values for Completed IT Sourcing Projects	\$0			\$232,690		\$232,690

Detail



Users can select an intersection in the table above and click the Details button to see the Sourcing Projects that make up the total.

Potential Review Points

- Are there any trends in total and / or by organization of completed Sourcing Projects that warrant further investigation?
- Are there any trends in total and / or by organization of IT Contract Values being awarded that warrant further investigation?

Report Purpose: This report provides the overall cycle time in working days for Sourcing Projects, broken out by Solicitation Vehicle type and Organization.

Overall IT Sourcing Project Cycle Time Report

Note: Average Cycle Time figures are in workdays

Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

Organization	IT: IFB	IT: RFP	IT: RFQ	IT: SOW	Total
Department of Administration			63.0		63.0
Department of Adult Correction		32.0	82.5		72.4
Department of Agriculture			38.0		38.0
Department of Insurance			59.0		59.0
Department of Justice			79.0		79.0
Department of Natural and Cultural Resources			50.0		50.0
Department of Public Instruction			63.0		63.0
Department of Revenue			52.0		52.0
DIT Purchasing				43.0	43.0
Division of Central Administration	71.8				71.8
Division of Vocational Rehabilitation Services			69.0		69.0
DOA Purchasing			31.0		31.0

Potential Review Points

- When looking at the average Sourcing Project cycle time, does the number or working days seem reasonable based on Solicitation Vehicle type?
- Are there any trends by State Agency that are interesting (e.g., a specific State Agency consistently takes longer to complete the Sourcing Project cycle time when compared to other State Agencies for the same Solicitation Vehicle type)?

Detail



Users can select an intersection in the table above and click the Details button to see the Sourcing Projects that make up the total.

IT Sourcing Project Cycle Time by Step Report

Report Purpose: This report provides the overall cycle time in working days for each Step in completed Sourcing Projects.

IT Sourcing Project Cycle Time by Step Report

Note: Average Cycle Time figures are in workdays

Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

Step	IT: IFB	IT: RFP	IT: RFQ	IT: SOW
01 - IDENTIFY AND VALIDATE BUSINESS NEED	7.8	7.9	8.8	13.0
02 - CONDUCT PLANNING MEETING			22.5	
03 - DEVELOP SOURCING EVENT	40.7	22.0	22.1	17.0
04 - REVIEW AND APPROVE SOURCING EVENT	20.1	32.1	22.0	40.3
05 - CONDUCT SOURCING EVENT	18.3	11.7	11.0	
06 - EVALUATE VENDOR RESPONSES	27.6	29.5	33.7	
07 - CONDUCT NCDIT REVIEW	8.0	13.0	10.9	
09 - REVIEW AND APPROVE AWARD RECOMMENDATIONS	8.8	6.0	7.4	

Detail



Users can select an intersection in the table above and click the Details button to see the Sourcing Projects that make up the total.

Potential Review Points

- When looking at the average Sourcing Project cycle time by Step, does the number or working days seem reasonable based on Solicitation Vehicle type?
- Are there any trends by State Agency that are interesting (e.g., a specific State Agency consistently takes longer to complete the Sourcing Project cycle time when compared to other State Agencies for the same Solicitation Vehicle type)?

Report Purpose: This report provides a listing of all IT Sourcing Projects with completion dates (where available) for milestone tasks along the IT procurement process to provide NCDIT with the ability to monitor Sourcing Project progress.

IT Sourcing Projects Status Report

Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

Organization: All
Sourcing Project Owner: All
Sourcing Project Status: Active
Solicitation Vehicle Type: All

Sourcing Project ID #	Organization	Sourcing Project Name	Sourcing Project Status	Sourcing Project Owner Name	Solicitation Vehicle Type	Target or Actual Completion Date	Step 01 Completion Date for Approval of IT Procurement Intake Form	Step 03 Completion Date for Agency Approval of Draft Solicitation Document	Step 04 Completion Date for NCDIT Approval of Solicitation Document and Sourcing Event	Step 05 Target Completion Date for Open Vendor Responses to Sourcing Event After Response Submission Deadline	Step 06 Completion Date for Agency Evaluation of Vendor Responses	Step 07 Completion Date for NCDIT Initial Review of Draft Award Recommendation and Leading Vendor Proposal(s)	Step 08 Completion Date for Request for BAFO Process	Step 09 Gain Statewide IT Procurement Office and OSBM (if applicable) of Final Award Recommendation	Step 10 Completion Date for Agency Execution of Contract
WS695810874	Division of Central Administration	IFB 30-23362 Copado Software Subscriptions	Active	Boyce Haywood	IT: IFB	Target			11/1/2023	11/29/2023	12/20/2023	1/24/2024	2/14/2024	3/6/2024	3/13/2024
						Actual	5/18/2023	5/24/2023							

Report filters help users find specific information faster



Users may need to use scroll bar to view all listed tasks

Potential Review Points

- Do any Sourcing Projects appear at risk of missing their Target Contract Award Date based on tasks that are not marked as completed?
- Are there any Sourcing Projects that are missing a Target Contract Award Date that warrant a follow-up with the Sourcing Project Owner to add this date in the Sourcing Tool?
- NOTE:** This report can be filtered by Organization, Sourcing Project Owner, Sourcing Project Status, and Solicitation Vehicle Type (using filters in red highlight box) to allow users to adjust displayed Sourcing Projects based on their information needs.
- NOTE:** Color coding of Target and Actual dates help visually identify where Sourcing Projects are at risk or are actually behind target schedule.

Approval Cycle Time by IT Sourcing Project Report

Preliminary

Report Purpose: This report provides a listing of all completed approval / review tasks for IT Sourcing Projects along with overall task cycle time and individual approver / reviewer cycle times.

Approval Cycle Time by IT Sourcing Project

Note: Cycle Time figures are in workdays

Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

Organization	Sourcing Project ID	Sourcing Project Name	Approval Group	Approver Name
All	All	All	All	All

Organization	Sourcing Project ID	Sourcing Project Name	Solicitation Vehicle	Step	Task Name	Approver	Reviewer	Start Date	End Date	Task Start Date	Task End Date	Group Status	Task Cycle Time	Overall Cycle Time
NC Health & Human Services	WS602484671	30-23114-DCDEE WORKS Project	IT: RFQ	04 - REVIEW AND APPROVE SOURCING EVENT	Gain NCDIT Approval of Solicitation Document and Sourcing Event	Statewide IT Procurement Office	Jessica Kilpatrick	2/10/2023	4/10/2023	2/9/2023	4/11/2023	Approved	44	42
					Statewide IT Procurement Office	Statewide IT Procurement Office	2/10/2023	2/10/2023	2/9/2023	4/11/2023	Approved	44	1	
					Statewide Admin	Statewide Admin	4/10/2023	4/11/2023	2/9/2023	4/11/2023	Approved	44	2	
					Statewide Admin	Statewide Admin	2/9/2023	2/9/2023	2/9/2023	4/11/2023	Approved	44	1	
					NCDIT ESRMO	NCDIT ESRMO	2/9/2023	2/10/2023	2/9/2023	4/11/2023	Approved	44	2	
				09 - REVIEW AND APPROVE AWARD RECOMMENDATIONS	Gain NCDIT Approval of Final Award Recommendation	Statewide IT Procurement Office	Jessica Kilpatrick	4/26/2023	5/17/2023	4/24/2023	5/17/2023	Approved	36	32
				Statewide IT Procurement Office	Statewide IT Procurement Office	4/24/2023	4/26/2023	4/24/2023	5/17/2023	Approved	36	6		
				Submit Draft Solicitation Document for Agency Approval	Agency CIO	Agency CIO	1/26/2023	2/8/2023	1/26/2023	2/8/2023	Approved	10	10	
				Gain NCDIT Approval of Solicitation Document and Sourcing Event	Statewide Admin	Statewide Admin	1/26/2023	2/1/2023	1/26/2023	2/1/2023	Denied	5	5	
				Statewide Admin	Statewide Admin	1/25/2023	1/26/2023	1/25/2023	1/26/2023	Denied	2	2		
Submit IT Procurement Intake Form to NCDIT Reviewers for Approval	NCDIT EPMO	NCDIT EPMO	1/25/2023	1/25/2023	1/25/2023	1/25/2023	Approved	1	1					

Report filters help users find specific information faster



Users may need to use scroll bar to view all listed tasks

Potential Review Points

- Do any Sourcing Projects appear to have taken longer than expected to complete an approval or review task?
- Within an approval or review task, did any specific approver or reviewer group take longer than expected?
- **NOTE:** This report can be filtered by Organization, Sourcing Project ID, Sourcing Project Name, Approver Group, and Approver Name (using filters in red highlight box) to allow users to adjust displayed Sourcing Projects based on their information needs.

Completed IT Contract Amendment, Renewal, Termination Letter Report Preliminary

Report Purpose: This report provides a listing of all completed approvals for IT contract amendments, renewals, and termination letters through the NC eProcurement Contracts Tool.

Completed IT Contract Amendment, Renewal, Termination Letter Report

Note: Due to timing of update process, the information in this report may not reflect activity within the past 24 hours

Contract Task Name	Gain NCDIT Approval of Draft Amendment Document			Gain NCDIT Approval of Draft Renewal Document
Year	2023			2023
Organization	June	August	September	October
Department of Adult Correction		1		
Department of Justice		1		
Department of Natural and Cultural Resources		1	1	
Department of Revenue	1	1		1
NC Community College System Office		1		
NC Health & Human Services		1		

Detail



Users can select an intersection in the table above and click the Details button to see the Contract Workspaces that make up the total.

Potential Review Points

- Are there any state agencies using NC eProcurement that have not run IT contract amendments, renewals, or termination letters through NC eProcurement Contracts Tool (which is required as of September 18, 2023)?

Access to the IT Procurement Dashboard requires approval from the Chief IT Procurement Officer and for the NCDIT user to have a Power BI Pro license.

Please email James Tanzosch at james.tanzosch@nc.gov to request access to the IT Procurement Dashboard, and include business justification for requesting access.

If approved, please contact the IT Help Desk to request a Power BI Pro license if you do not already have one.