

## Instructions on how to run a report to extract contracts for agencies who report their contracts in Enterprise Contract Management System (ECMS)

Instructions 1-5 help you to gain access to the Web Intelligence Tool (WebI). If you already have access, skip to instruction 6.

1. Go to the OFM web site for [Business Intelligence](#)
2. Submit a request under **Request Access** in the right column by selecting the appropriate option; **Within State Network** or **Outside State Network**.
3. Fill in the form.
4. Under **Desired Services**, select **Web Intelligence** and **Report Universe**.
5. Under the **Special Instructions** type in **Contract Management Universe**.
6. Login to Web Intelligence by selecting the appropriate option:
  - a. [Within State Network](#)
  - b. [Outside State Network](#)
7. Once you log in, click on your **Documents Tab** located next to your **Home Tab**.
8. Click on your **Folders Tab** on the left hand side - it should bring up the public folders.
9. Click on the **ECMS Group – Web Intelligence** link.
  - a. *Note: if you do not have access to this ECMS folder group, contact your IT department so they can work with OFM to get you access.*
10. Double click on the **Contract Reporting Folder** (Figure 1).
11. Double click on the Contract Reporting icon.

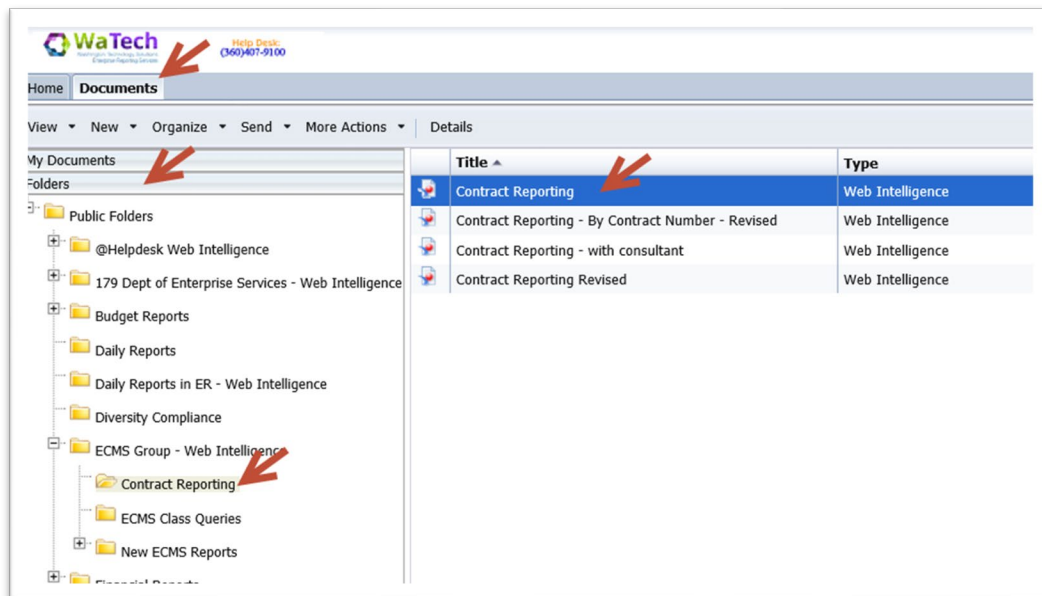


Figure 1. Web Intelligence Contract Reporting folder and report; 061818.

12. Navigate to the Contract Report, Right Click, and select Schedule.(Figure 2).

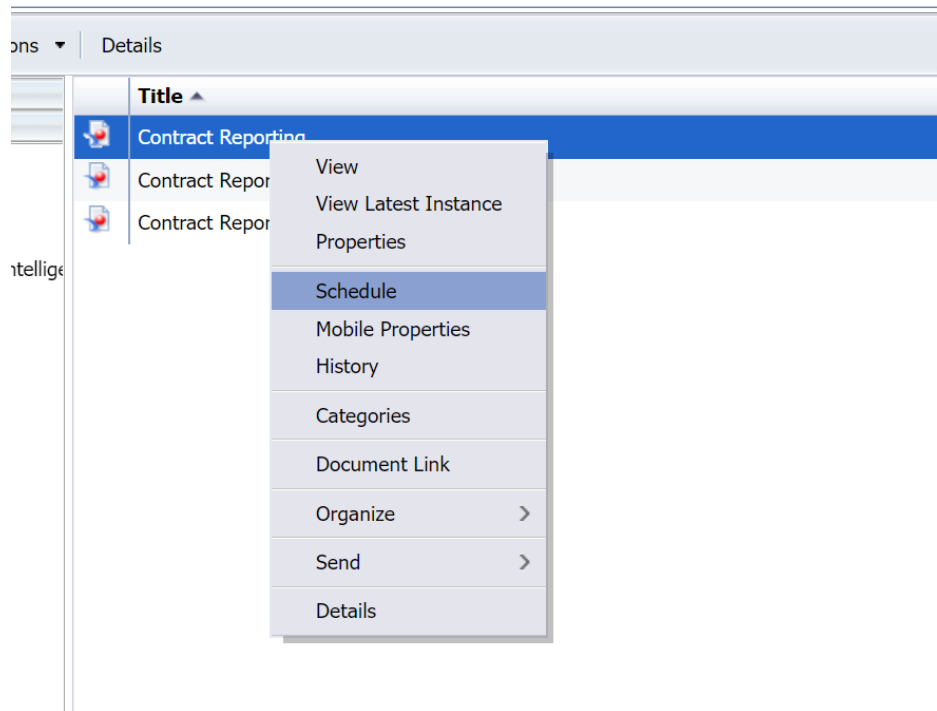


Figure 2.

13. Select 'Prompts' from the left-hand navigation, click 'Modify', select your agency from the list and either double click or click the '>' to move it to the right hand list, click 'Apply' (Figure 3).

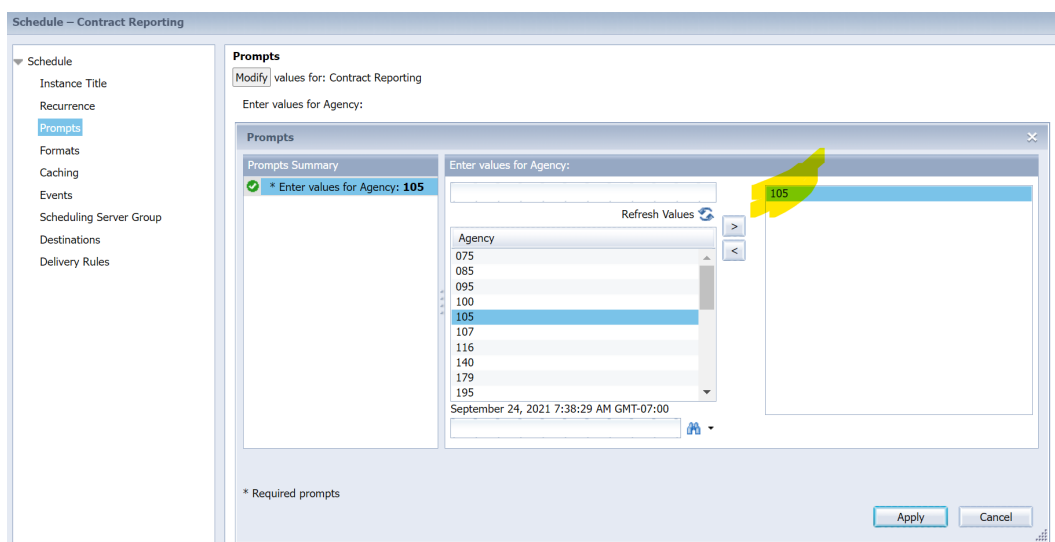
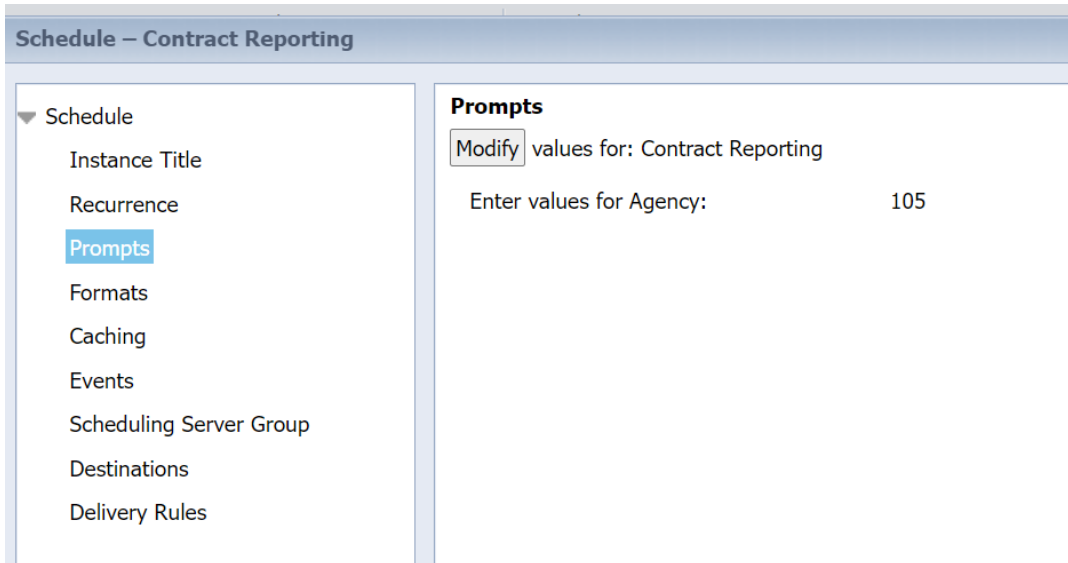


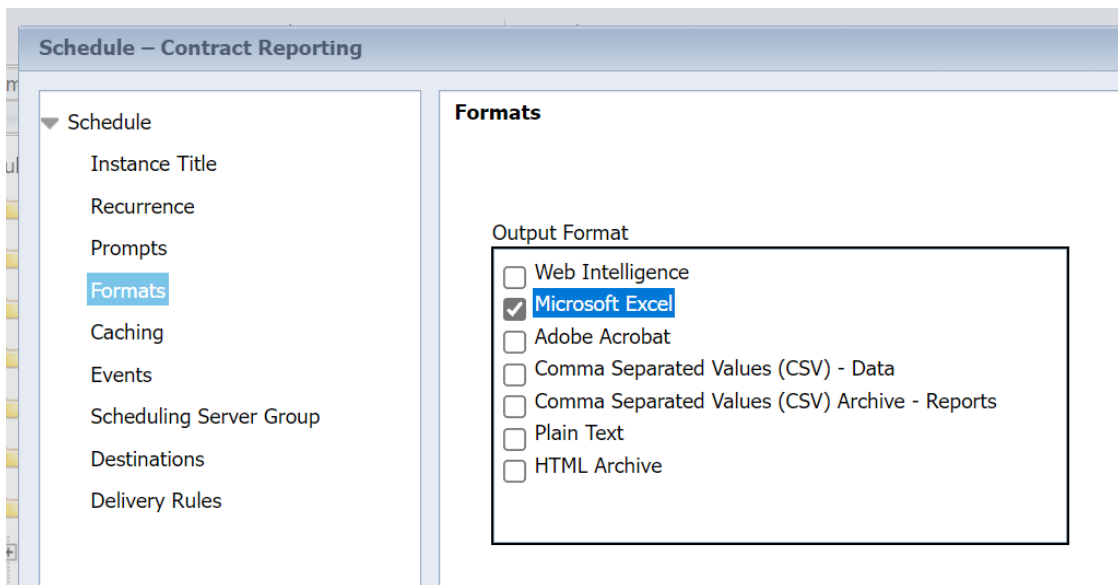
Figure 3. Web Intelligence Prompts dialog box; 061818.

14. Confirm that the agency you selected is shown on the Prompts screen.



The screenshot shows the 'Schedule - Contract Reporting' interface. On the left, a navigation pane lists several options: Schedule, Instance Title, Recurrence, Prompts (highlighted in blue), Formats, Caching, Events, Scheduling Server Group, Destinations, and Delivery Rules. The main content area is titled 'Prompts' and contains a 'Modify' button followed by the text 'values for: Contract Reporting'. Below this, it says 'Enter values for Agency: 105'.

15. Select 'Formats' from the left-hand navigation and select 'Microsoft Excel'
16. From here, if you do not want the report to be e-mailed to you, click 'Schedule' at the bottom right. When the report is complete you may access the report on the history page.



The screenshot shows the 'Schedule - Contract Reporting' interface with the 'Formats' tab selected in the left navigation pane. The main content area is titled 'Formats' and contains a section for 'Output Format' with a list of options: Web Intelligence, Microsoft Excel (checked and highlighted in blue), Adobe Acrobat, Comma Separated Values (CSV) - Data, Comma Separated Values (CSV) Archive - Reports, Plain Text, and HTML Archive.

17. You may use this report to copy and paste into the [Agency Contract Reporting Template](#).