PO-18 Run Supplier Reports

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Run Supplier Reports in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of running supplier reports by viewing various supplier reports and dashboards. Supplier reports provide information of supplier details like Supplier Tax ID, Address Details, etc. There are several supplier reports that can be generated. This includes Financial Backbone Replacement (FBR) Factored Suppliers Reports, FBR Supplier Holds Reports, FBR Supplier List Reports, and FBR Tax Configuration Reports.

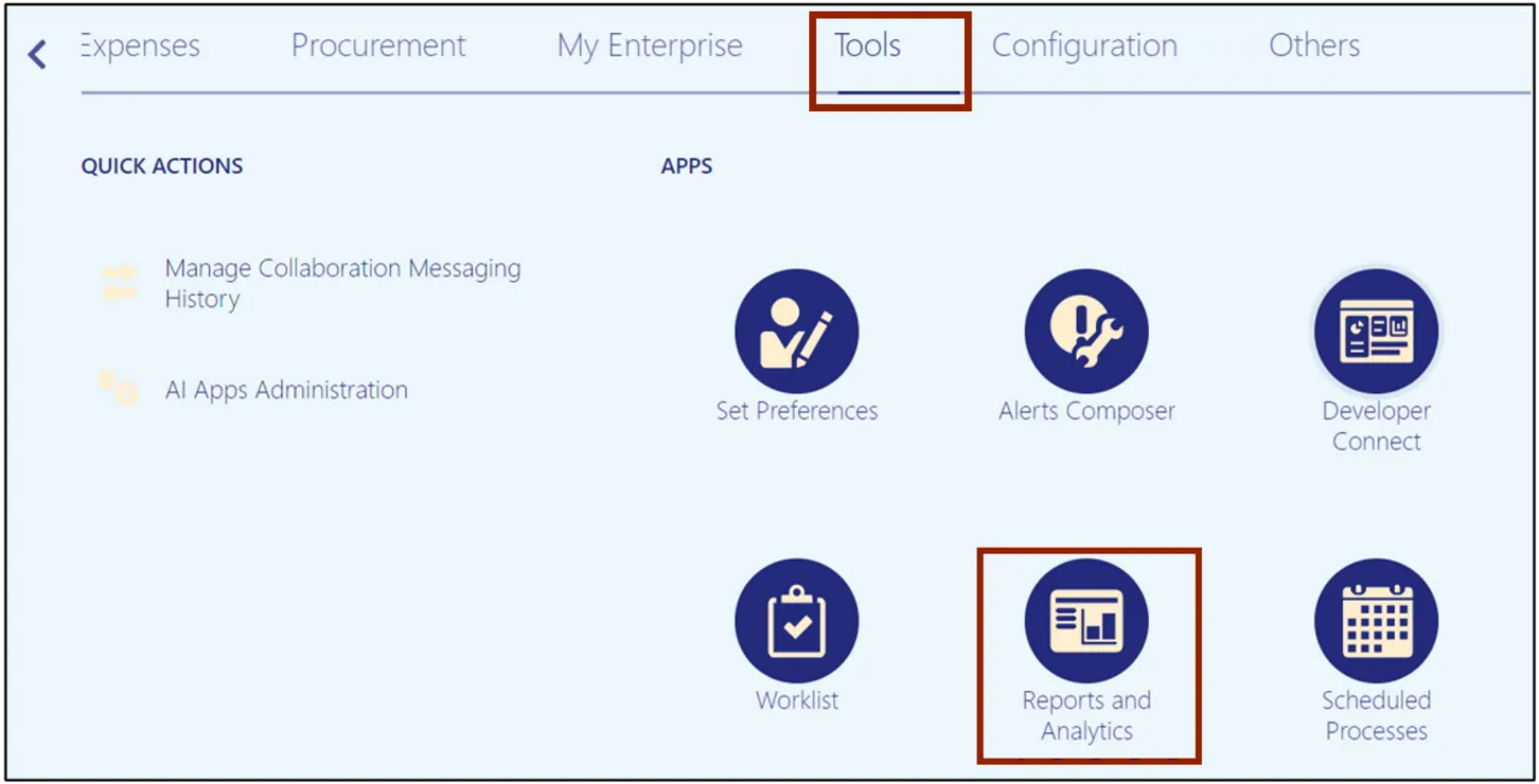
Run Supplier Reports

To run supplier reports, please follow the steps below. There are 15 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

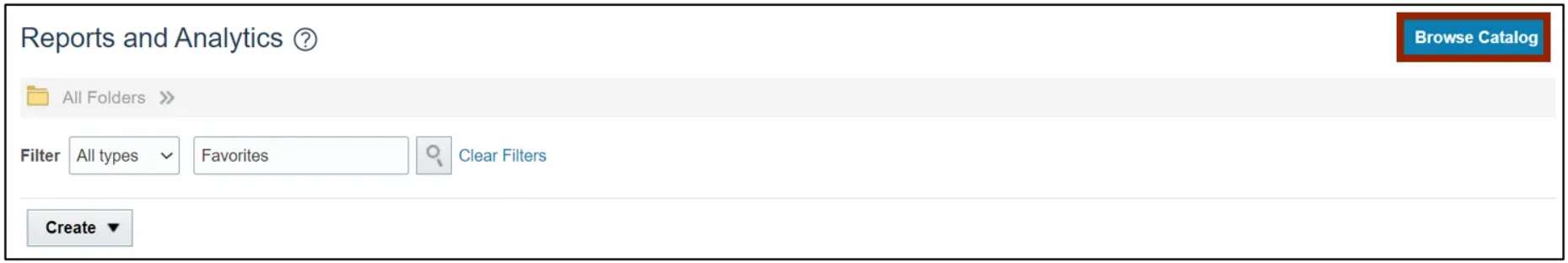
Step 2. On the **Home** page, click the **Tools** tab and select the **Reports and Analytics** app.

Image



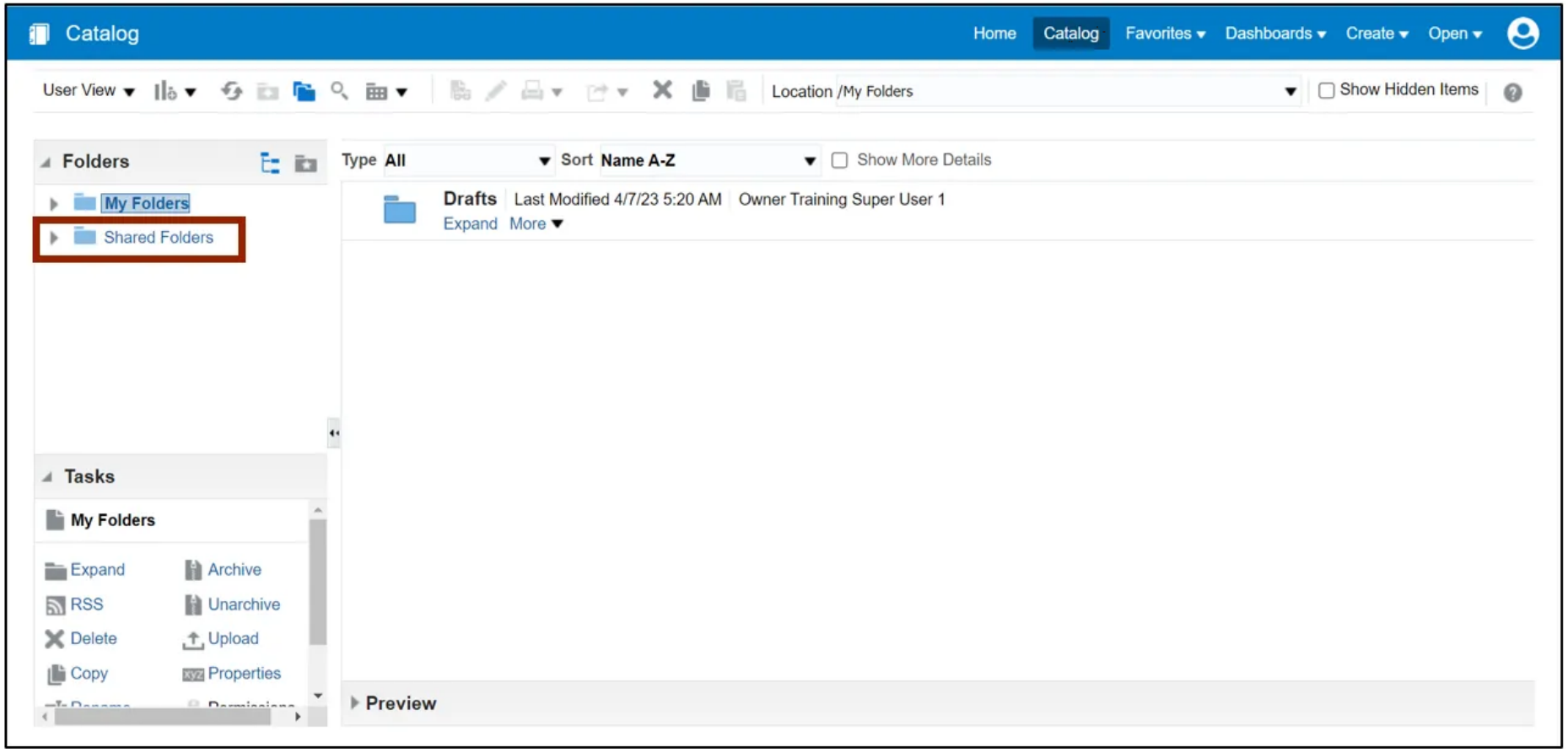
Step 3. Click the **Browse Catalog** button on the top right corner.

Image



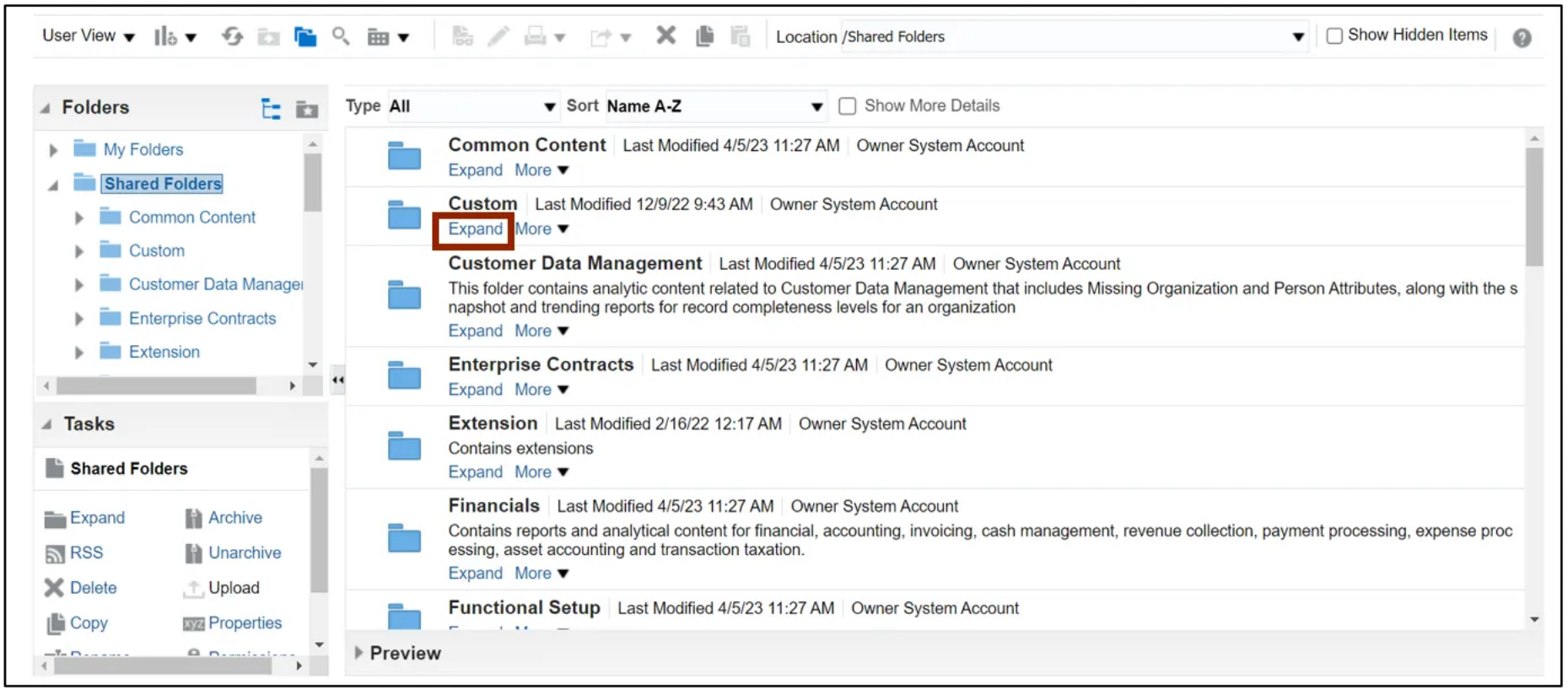
Step 4. The **Catalog** page opens. Under the ***Folders*** section on the left side of the page, click **Shared Folders**.

Image



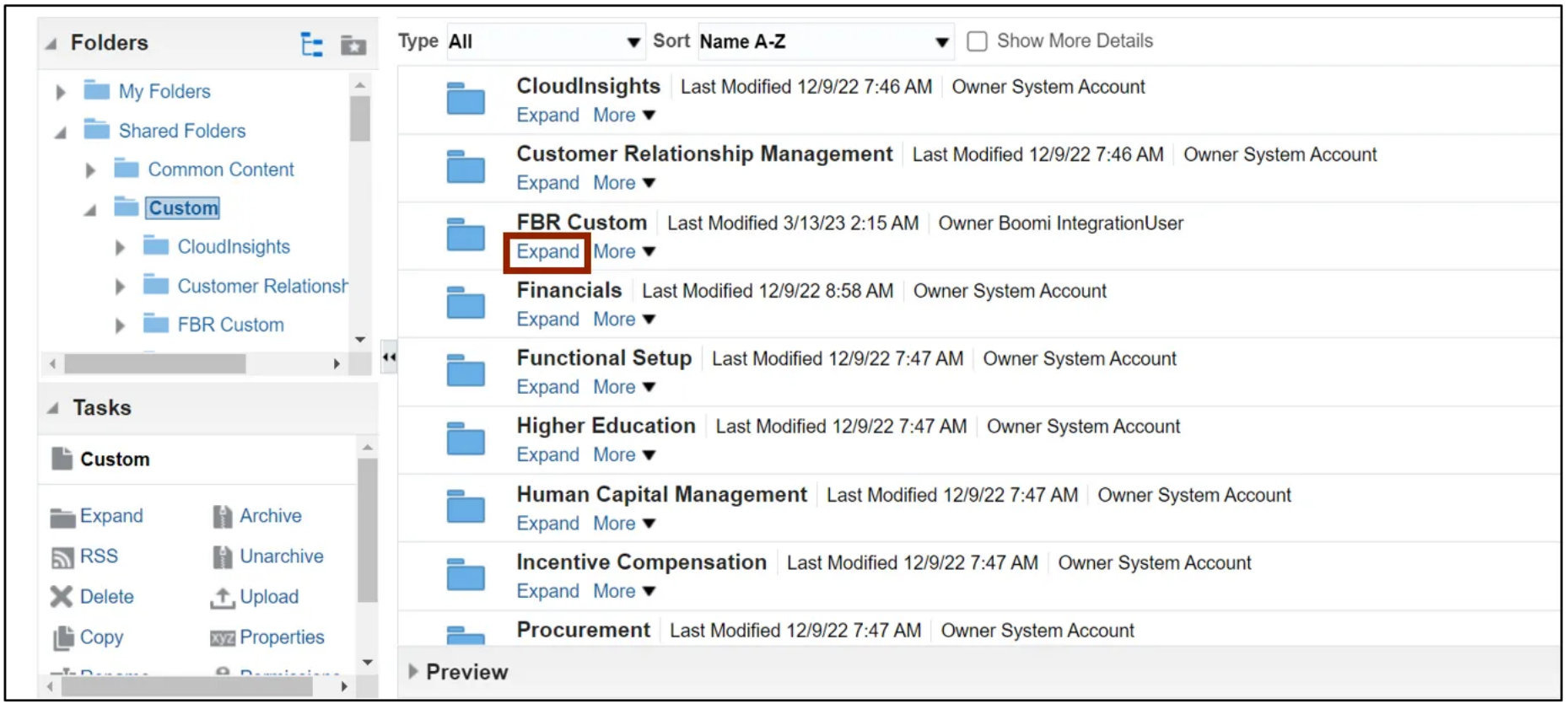
Step 5. Under the **Custom** folder, click **Expand**.

Image



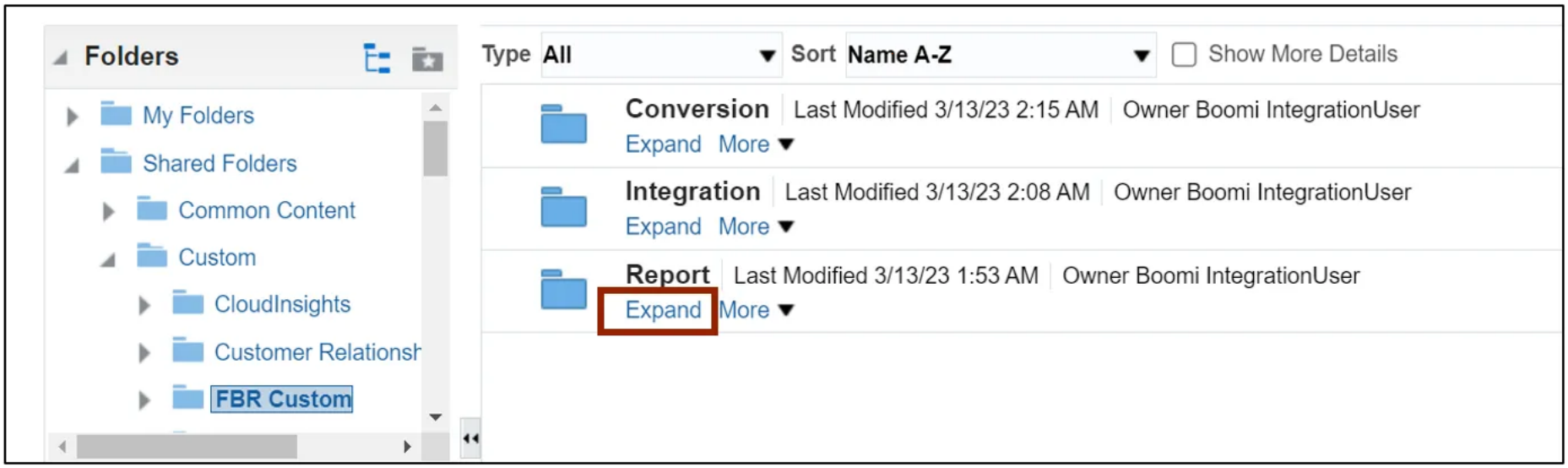
Step 6. Under the **FBR Custom** folder, click **Expand**.

Image



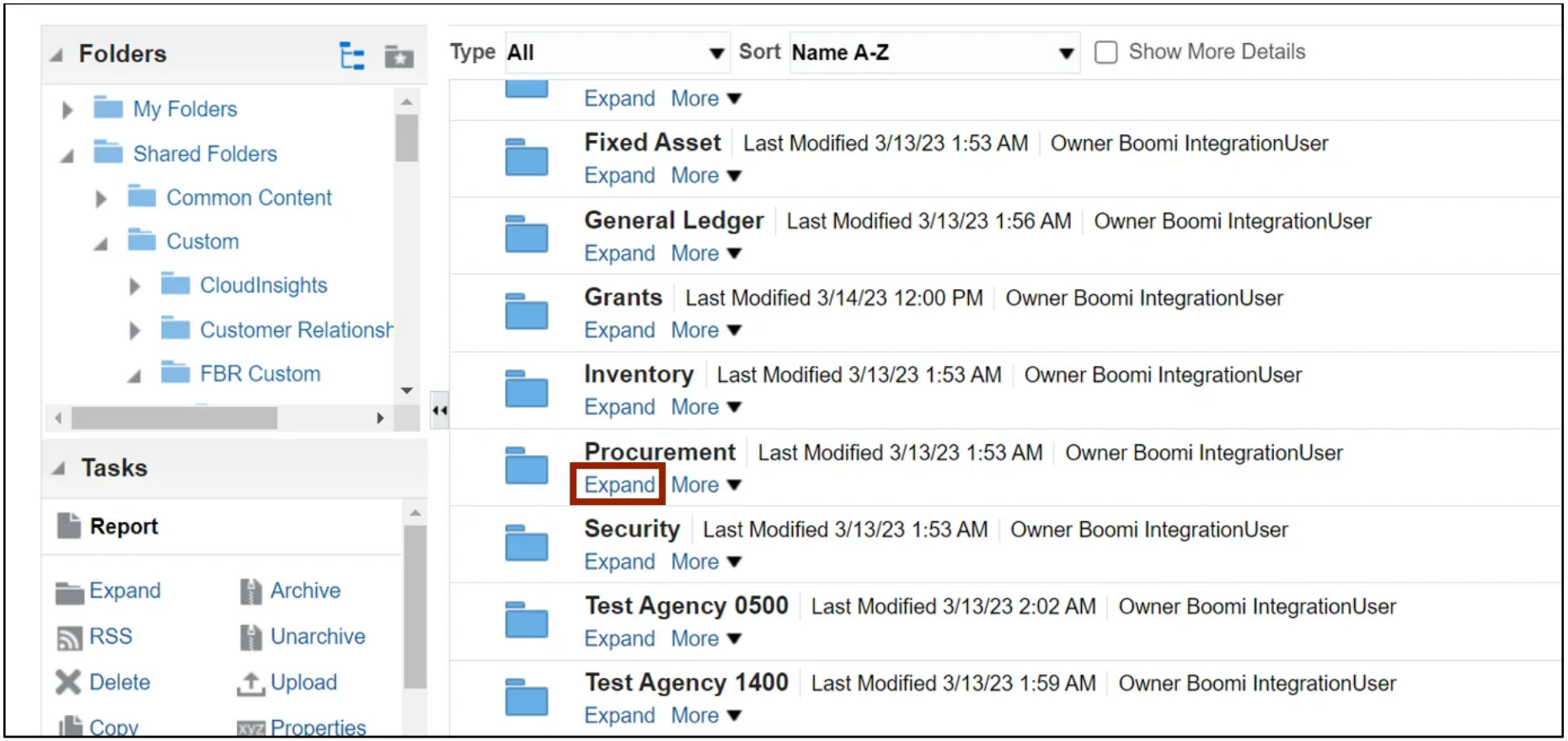
Step 7. Under the **Report** folder, click **Expand**.

Image



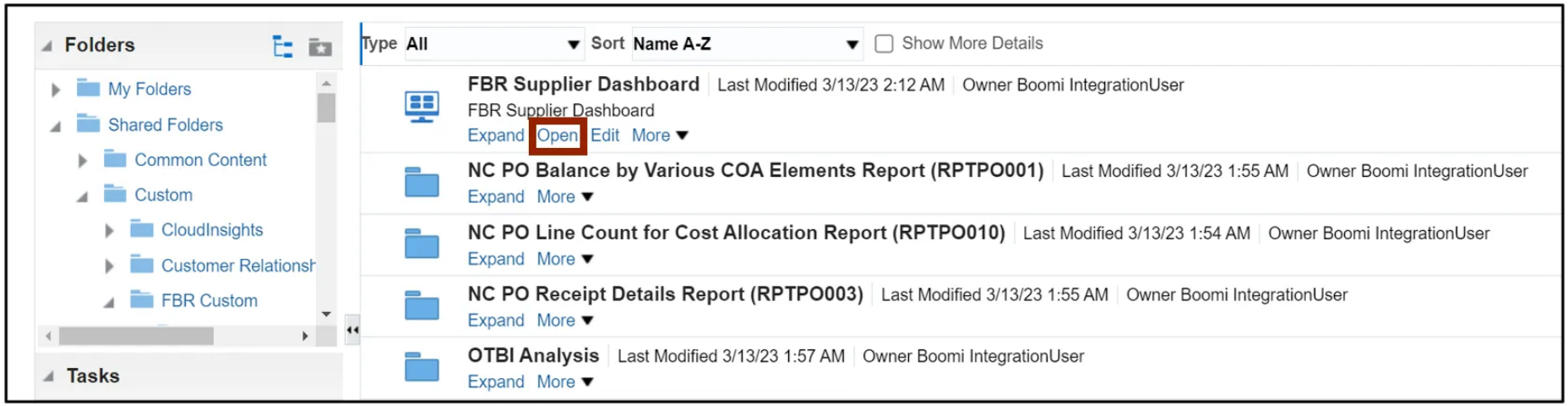
Step 8. Scroll down to find the **Procurement** folder. Then, click **Expand**.

Image



Step 9. Under **FBR Supplier Dashboard**, click **Open**.

Image



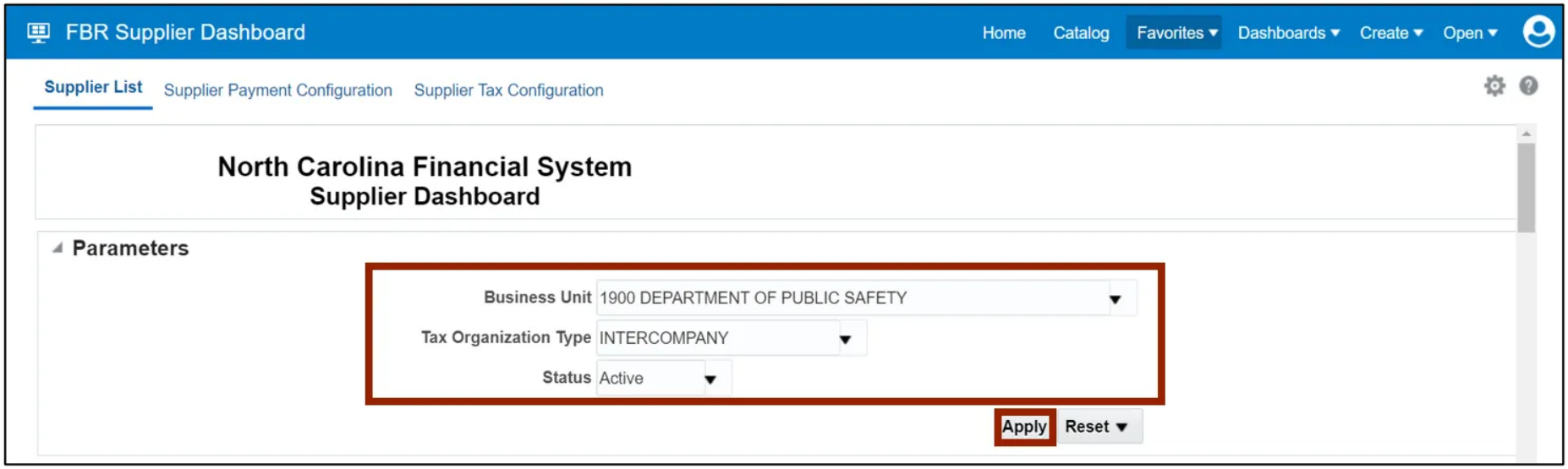
Step 10. In the ***Parameters*** section of the **Supplier List** tab, select the required parameters from the respective drop-down choice lists to filter the supplier list, and click the **Apply** button.

In this example, we choose:

- ***Business Unit:*** **1900 DEPARTMENT OF PUBLIC SAFETY**
- ***Tax Organization Type:*** **INTERCOMPANY**
- ***Status*****: Active**

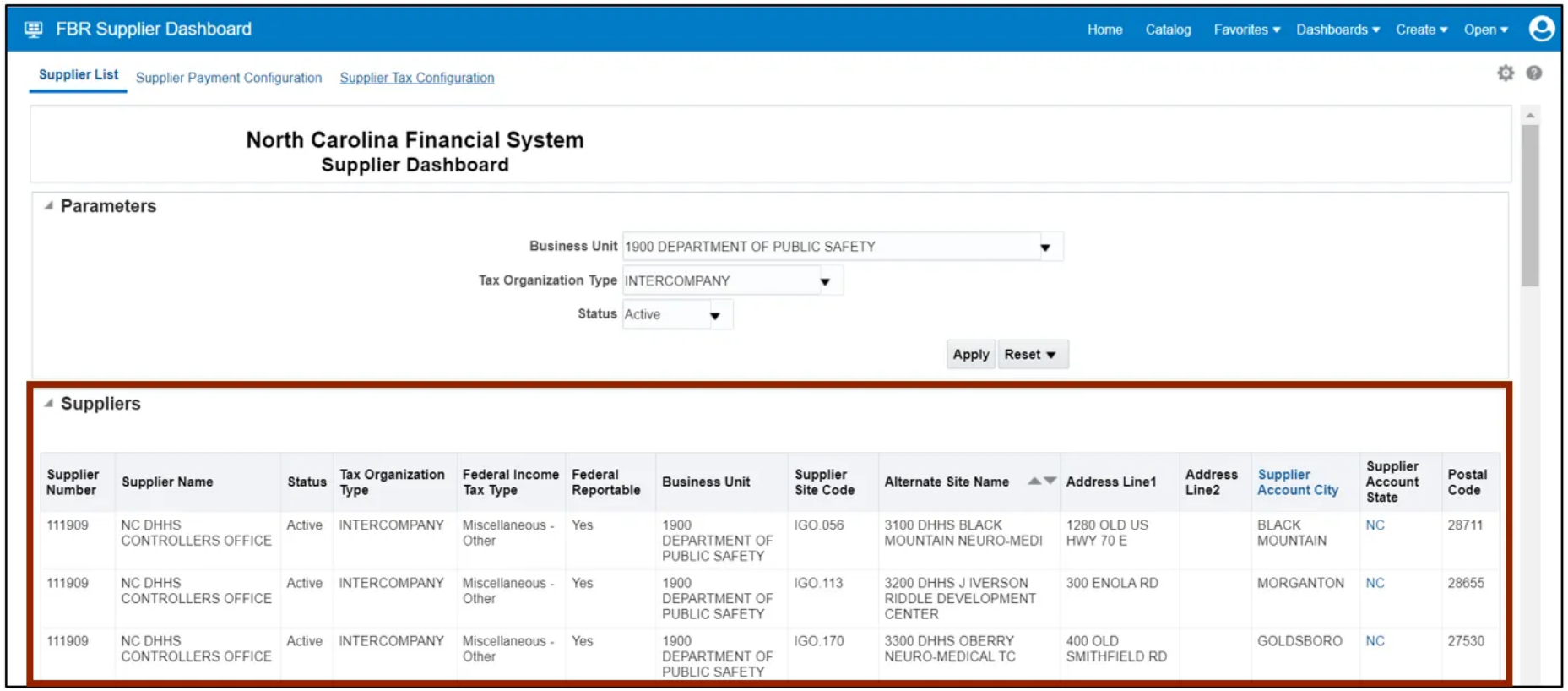
Note: By default, **All Column Values** is selected for all three parameters. This grays out all other selections. Click the respective drop-down choice list and uncheck the **All Column Values** check box to make an individual selection.

Image



Step 11. View and verify the Suppliers information from the dashboard.

Image

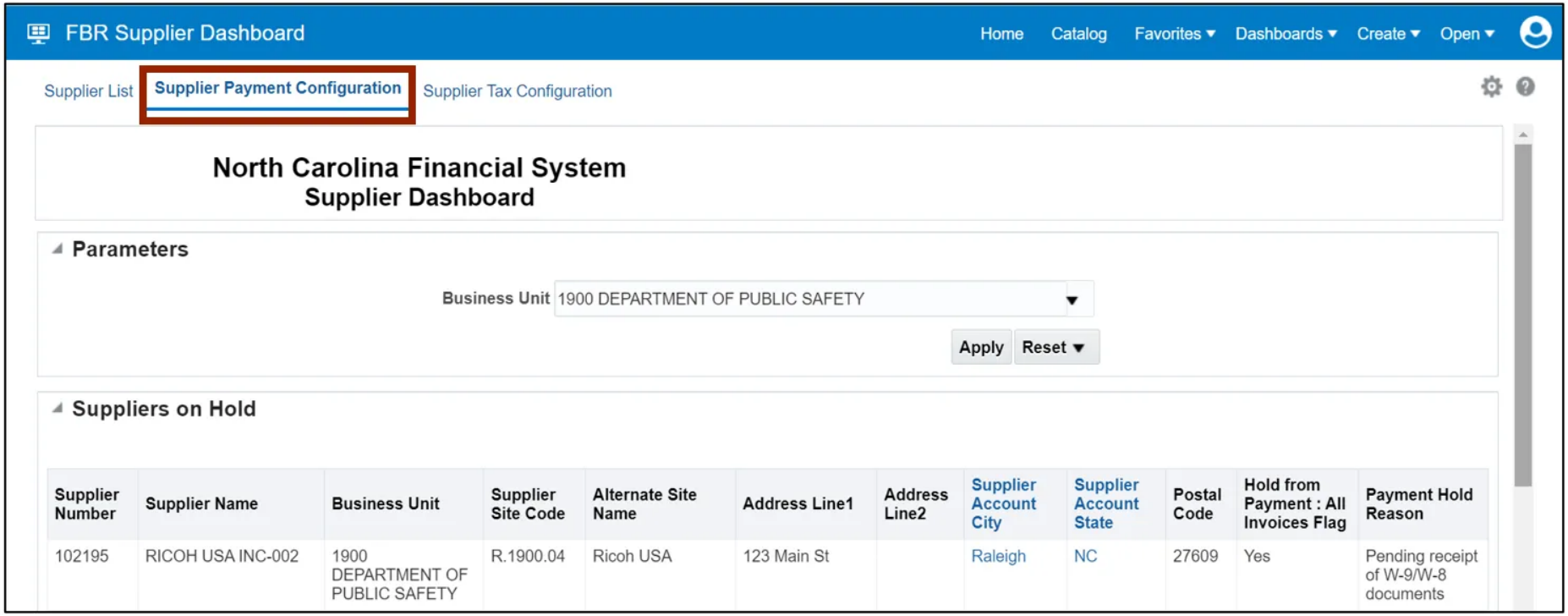


Step 12. Navigate to the **Supplier Payment Configuration** tab.

Note: In the ***Parameters*** section, the ***Business Unit*** field is filled by default.

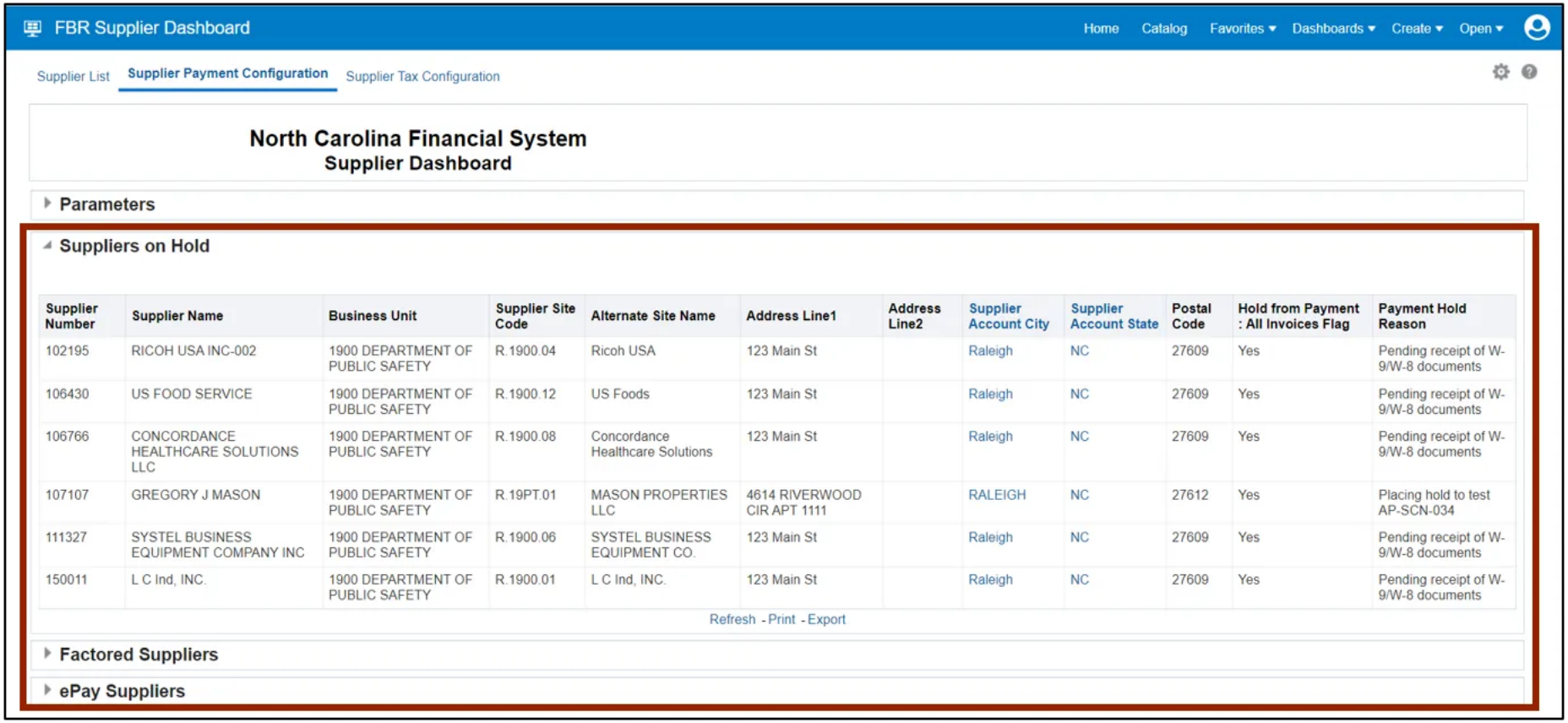
In this example, the ***Business Unit*** field drop-down choice list has **1900 DEPARTMENT OF PUBLIC SAFETY** check box selected.

Image



Step 13. View the ***Suppliers on Hold, Factored Suppliers***, and ***ePay Suppliers*** reports for the filtered Agency.

Image

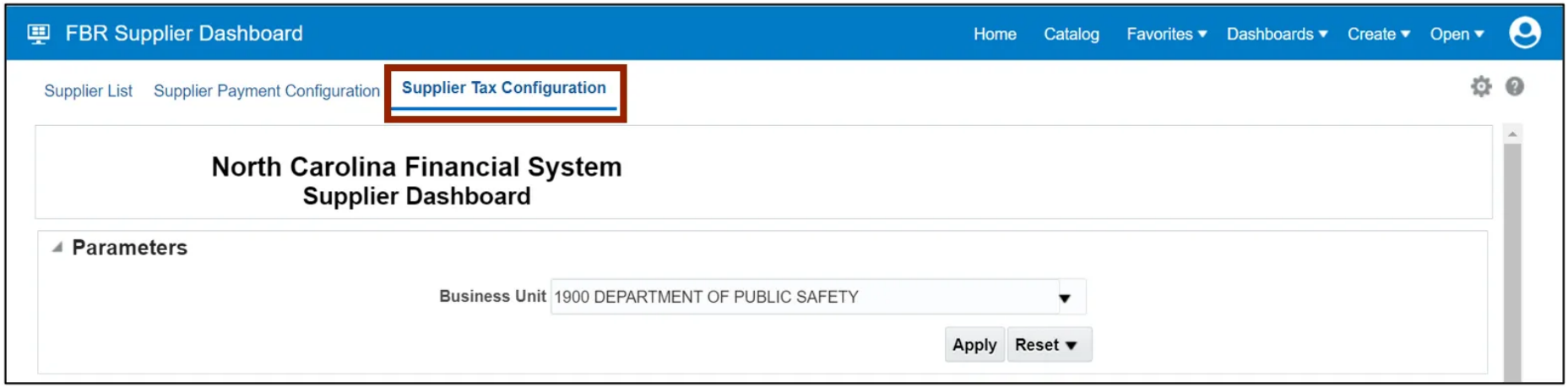


Step 14. Navigate to the **Supplier Tax Configuration** tab.

Note: In the ***Parameters*** section, the ***Business Unit*** field is filled by default.

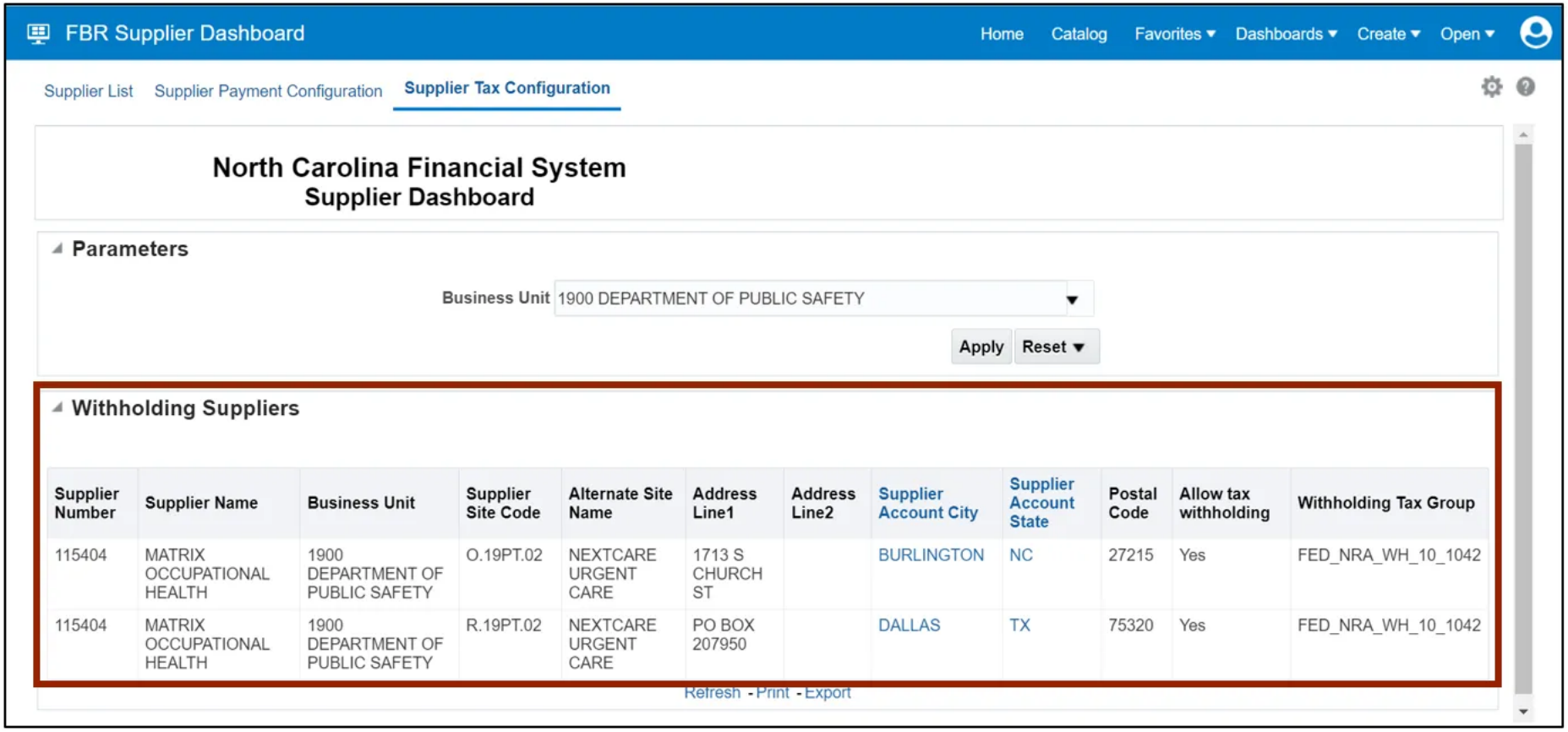
In this example, the ***Business Unit*** field drop-down choice list has **1900 DEPARTMENT OF PUBLIC SAFETY** check box selected.

Image



Step 15. View the ***Withholding Suppliers*** report for the filtered Agency.

Image



Wrap-Up

Run supplier reports using the steps above to view various supplier reports and dashboards.

Additional Resources

- Web-Based Training (WBT)
  - PO002: Supplier Inquiry

First Published

Fri, 08/22/2025

Last Updated

Fri, 08/22/2025

Printable PDF