Generating Reports

Generating Reports Overview

The CRPS provides the ability to generate several kinds of reports, as described below:

The system includes two different types of reports associated with the CRP Check functionality. There are reports that provide information on the CRP Checks that have been executed in the system. Each time that a CRP Check is executed, the check is stored in the Audit table to include the contractor checked, the username of the person executing the check, the date of the check, and the results of the check. There are four separate reports that allow slightly different ways of viewing this data. The Audit table records usage of the web application to execute CRP Checks as well as usage of the web portal to execute CRP Checks.

In addition to these reports, the system also includes two reports that provide the obligation data that is stored in the CRPS database. These reports provide all of the obligations stored in the CRPS database as of the most recent file download received by the CRPS. One of the reports provides all of the data; therefore, it is a very lengthy report. The other report allows you to select the obligations for contributing specific Agency (Revenue, L & I (Unemployment Compensation) and State Workman's Insurance Fund (SWIF).

Finally, a Performance Issue report is available *to those users with the role of PI Approver* in the system. The main purpose of this report is to report on the pending performance issues for an agency so that the approver is able to easily identify those that need to be approved. This report provides additional functionality beyond the email for approvers to ensure that all performance issues are approved, and none are missed. This report can also be used as a research mechanism for an agency or for the commonwealth as a whole.

This chapter will review the following activities:

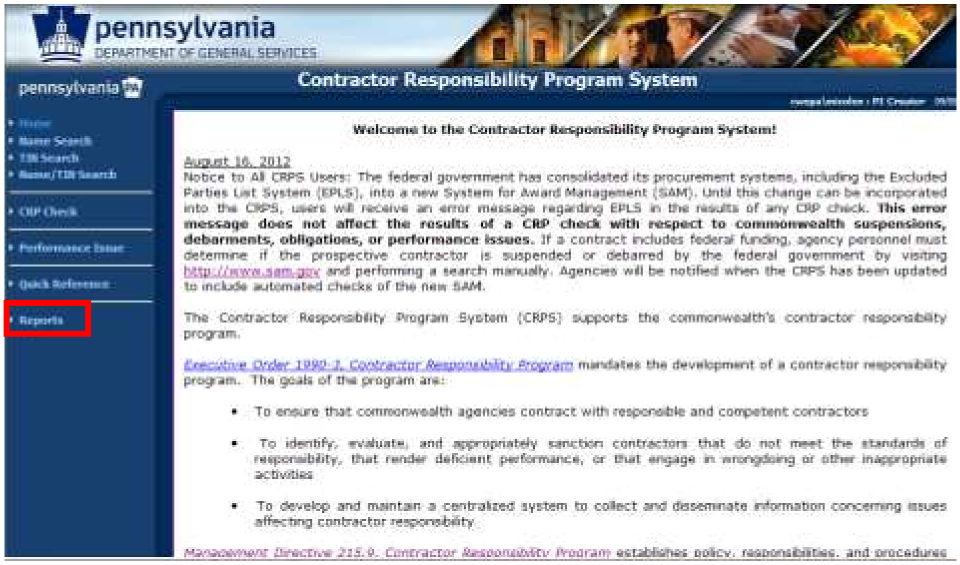
1. Execute History of CRP Checks Report
   (By Vendor, By User, By User and Vendor, By Reason)
2. Execute Vendor Obligations Report
3. Execute Performance Issues Report

Generating Reports At-A-Glance

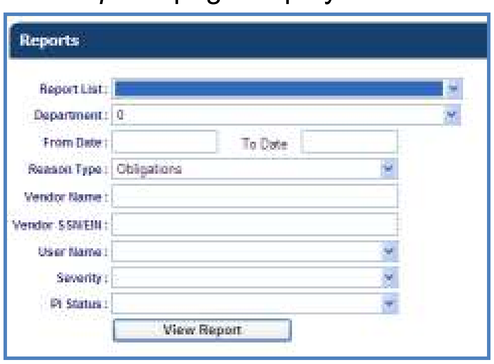
User	PI Creator	PI Approver	Administrator	Task/Demo
X	X	X	X	1. Execute History of CRP Checks Report (By Vendor, By User, By User and Vendor, By Reason) ➢ This group of reports allows the user to report on the audit data stored for each of the CRP Checks executed in the CRPS. This includes CRP Checks executed via the DGS website portal. ➢ Each of the different types of reports allows a slightly different variation of the data and requires slightly different parameters to be entered.
X	X	X	X	2. Execute Vendor Obligations Report ➢ These reports provide all obligation data stored in the CRPS database as of the most recent files received from the contributing agencies. ➢ These reports are lengthy and may take time to generate.
		X	X	3. Execute Performance Issues Report ➢ The Performance Issues report allows the PI Approver to report on the performance issues stored in the CRPS by Agency, Severity and/or PI Status. This report can be used to ensure that all pending Agency performance issues have been reviewed and approved. ➢ You may view, export or print the report results.

Demonstration 1: Execute History of CRP Check Reports (By Vendor, By User, By User and Vendor, By Reason)

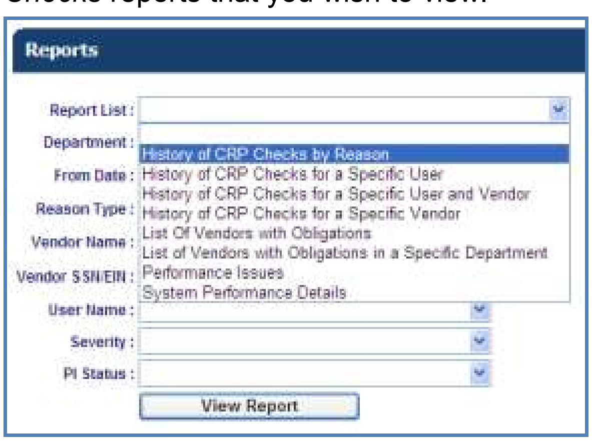
1. Access the CRPS and select the ***Reports*** link on the left navigation pane.



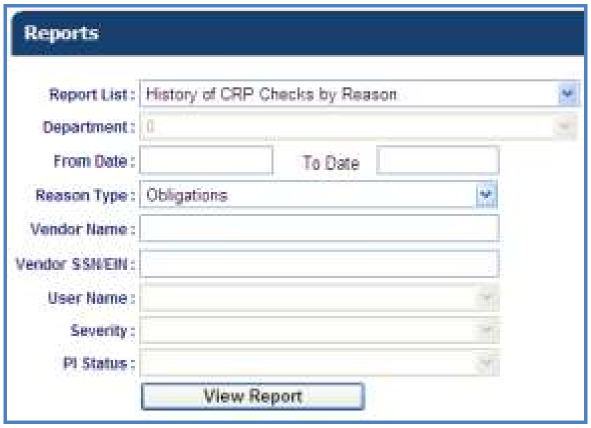
The *Reports* page displays.



2. Select the dropdown menu in the ***Reports List*** field and choose one of the *History of CRP Checks* reports that you wish to view.

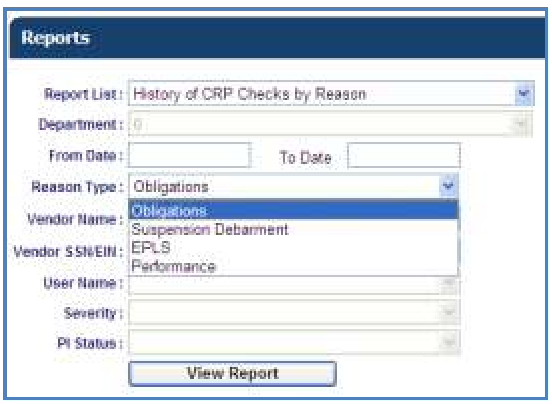


History of CRP Checks by Reason



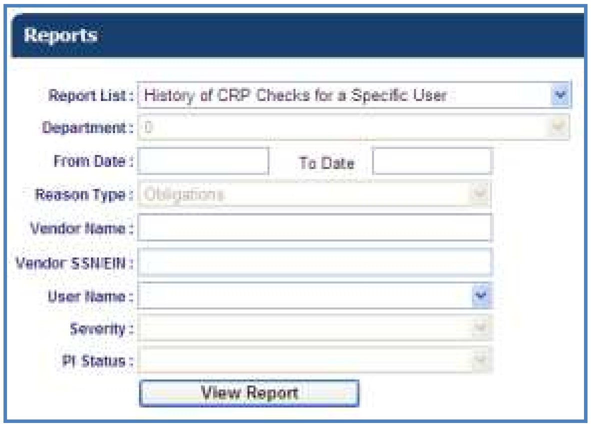
Required parameters:

- ***From Date***
- ***To Date***
- ***Reason Type*** – Obligations, Suspension Debarment, EPLS*, Performance



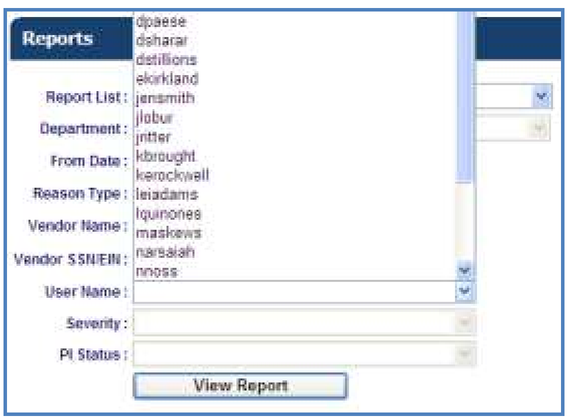
*** To determine if the prospective contractor is suspended or debarred by a federal agency, you must perform a search manually in the SAM database by visiting http://www.sam.gov.**

History of CRP Checks for a Specific User

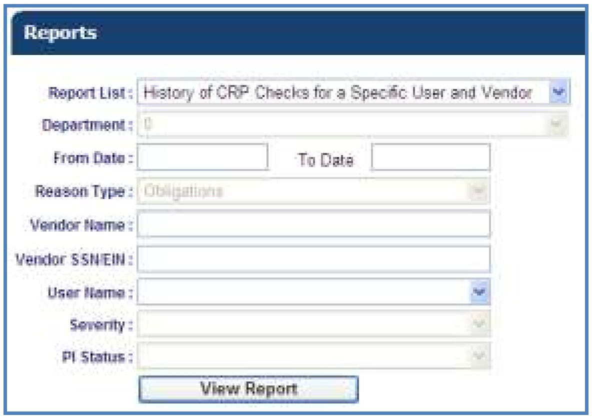


Required parameters:

- ***From Date***
- ***To Date***
- ***User Name***



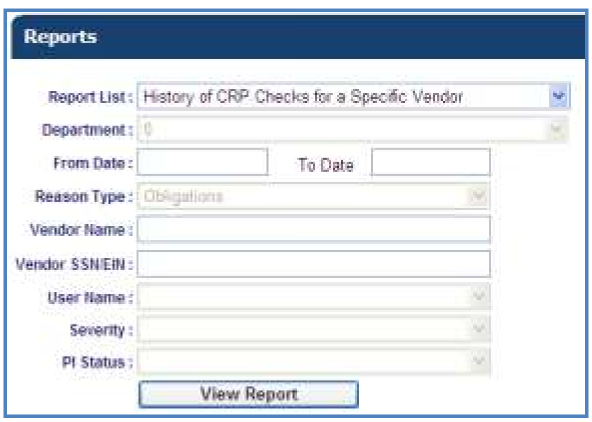
History of CRP Checks for a Specific User and Vendor



Required Parameters:

- ***From Date***
- ***To Date***
- ***Vendor Name***
- ***Vendor SSN/EIN***
- ***User Name***

History of CRP Checks for a Specific Vendor



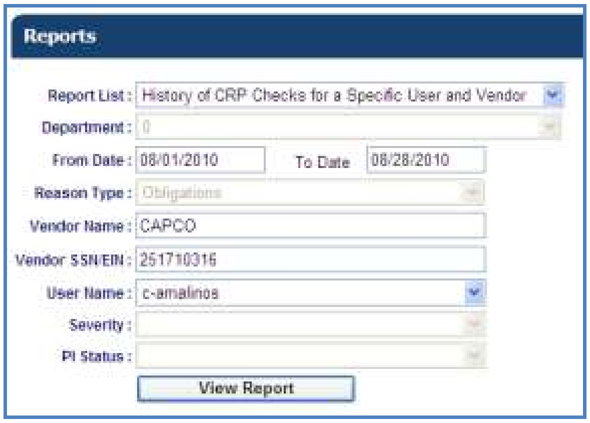
Required Parameters:

- ***From Date***
- ***To Date***
- ***Vendor Name***
- ***Vendor SSN/EIN***

3. History of CRP Checks for a Specific User and Vendor

Enter the required parameters for the report:

- ***From Date***
- ***To Date***
- ***Vendor Name***
- ***Vendor SSN/EIN***
- ***User Name***

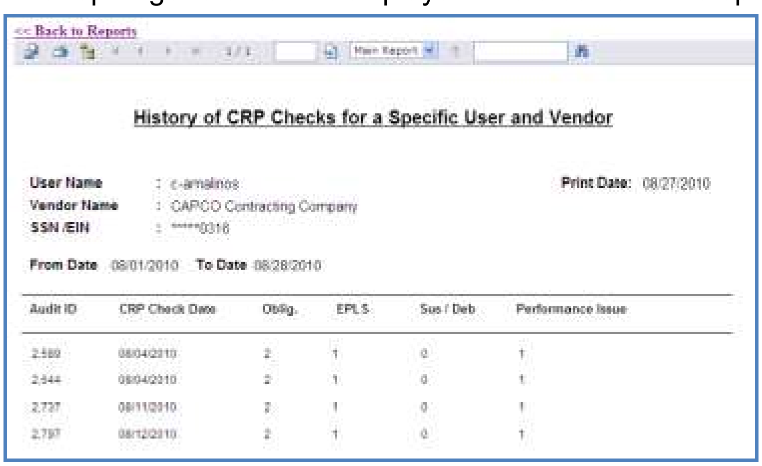


The selections in the above screenshot will produce a report listing all CRP Checks executed for CAPCO, 251710316 by c-amalinos between August 1, 2010 and August 28, 2010.

	If the report is to include any CRP Checks executed on the current date, then the ***To Date*** entered must be the next day's date. For instance if today is 8/25/2010 and the CRP Checks executed on 8/25/2010 should be included in the report, then the ***To Date*** entered must be 8/26/2010.

4. Select the ***View Report*** button.

   The report generates and displays. You also have the option to export and/or print the report*.


<< Back to Reports

History of CRP Checks for a Specific User and Vendor

User Name : c-amalinos
Vendor Name : CAPCO Contracting Company
SSN /EIN : *****0316
Print Date: 08/27/2010

From Date 08/01/2010 To Date 08/28/2010

Audit ID	CRP Check Date	Oblig.	EPLS	Sus / Deb	Performance Issue
2,580	08/04/2010	2	1	0	1
2,544	08/04/2010	2	1	0	1
2,727	08/11/2010	2	1	0	1
2,797	08/12/2010	2	1	0	1

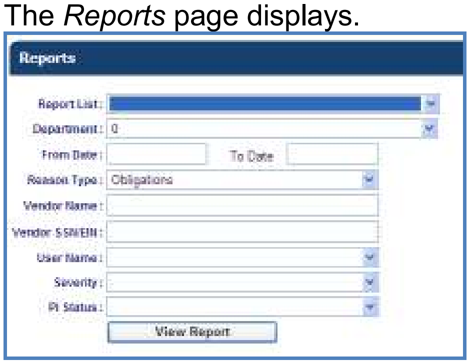
***Note:** The Export and/or Print the CRP Check Certification Form instructions may be used as a guide.

5. Select the ***Back to Reports*** link to return to the CRPS.

Demonstration 2: Execute Vendor Obligations Report

1. Access the CRPS and select the ***Reports*** link on the left navigation pane.

The *Reports* page displays.



2. Select the dropdown menu in the ***Reports List*** field and choose one of the *Obligations* reports that you wish to view.

   The **List of Vendors with Obligations** lists all of the obligations in the CRPS database without parameters. *****This report is very lengthy*****. The **List of Vendors with Obligations in a Specific Department** lists all of the obligations for a specific Agency – Department of Revenue, L & I (Unemployment Compensation), or SWIF.

The **List of Vendors with Obligations** report is several thousand pages in length and takes time to generate. **It should be viewed and not printed**. If you choose to ***View*** this report, it only displays in Adobe and is not exportable.

List of Vendors With Obligations

Print Date: 8/27/2011

S.No	Vendor Name	FEDID	SSN	Contact Name	Phone	Dept
1		******7348		TAX CLEARANCE COLLECT SEC	7177838680	DOR
2		******2343		RAYMOND BOROLLA	2159853128	DOR
3		******8277		HARRISBURG PHONE UNIT	7177838434	DOR
4		******3696		HARRISBURG PHONE UNIT	7177838434	DOR
5		******1471		HARRISBURG PHONE UNIT	7177838434	DOR
6		******2267		JULIUS MAGRINI	4129855288	DOR
7		******4818		HARRISBURG PHONE UNIT	7177838434	DOR
8		******0714		ANASTASIA DIBARTOLOMEO	7174257704	DOR
9		******4369		HARRISBURG PHONE UNIT	7177838434	DOR
10		******0714		ANASTASIA DIBARTOLOMEO	7174257704	DOR
11		******4369		HARRISBURG PHONE UNIT	7177838434	DOR
12		******4369		HARRISBURG PHONE UNIT	7177838434	DOR
13		******5350		HARRISBURG PHONE UNIT	7177838434	DOR
14		******0188		HBG TELEPHONE COLLECTIONS	7177838434	DOR
15		******5350		HARRISBURG PHONE UNIT	7177838434	DOR
16		******0188		HBG TELEPHONE COLLECTIONS	7177838434	DOR
17		******8225		HARRISBURG PHONE UNIT	7177838434	DOR
18	1 2 GROW ON	******8025		SANDRA ROUNDTREE	4129852463	DOR
19	1 2 GROW ON CHILD CARE & PRESCHOOL	******7232		HARRISBURG PHONE UNIT	7177838434	DOR
20	1 2 GROW ON CHILDCARE & PRESCHOOL INC	******7232		OFFICE OF UC TAX SERVICES	8884036183	LI
21	1. SITKA ENTERPRISES INCORPORATED	******0176		HARRISBURG PHONE UNIT	7177838434	DOR
22	111 AUDIO VIDEO LLC	******8324		HBG TELEPHONE COLLECTIONS	7177838434	DOR
23	1329 BRISTOL PIKE ASSOCIATES DBA HAMPTON INN	******0117		OFFICE OF UC TAX SERVICES	8884036183	LI

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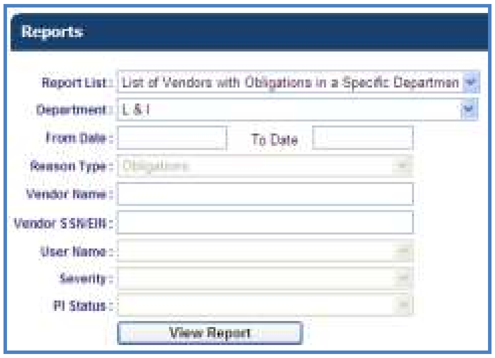
Be sure to select the ***Back*** button on the browser to return to the CRPS. (***If the back button does not work, select the refresh icon to return to CRPS)***

The following steps only apply to the **List of Vendors with Obligations in a Specific Department** report.

3. Select the Department for the **List of Vendors with Obligations in a Specific Department** report and select a Department.



4. Select the ***View Report*** button.

   The report displays. You also have the option to export and/or print the report*.

List of Vendors with Obligations in a Specific Agency

Department Name L & I

Print Date: 8/27/2010

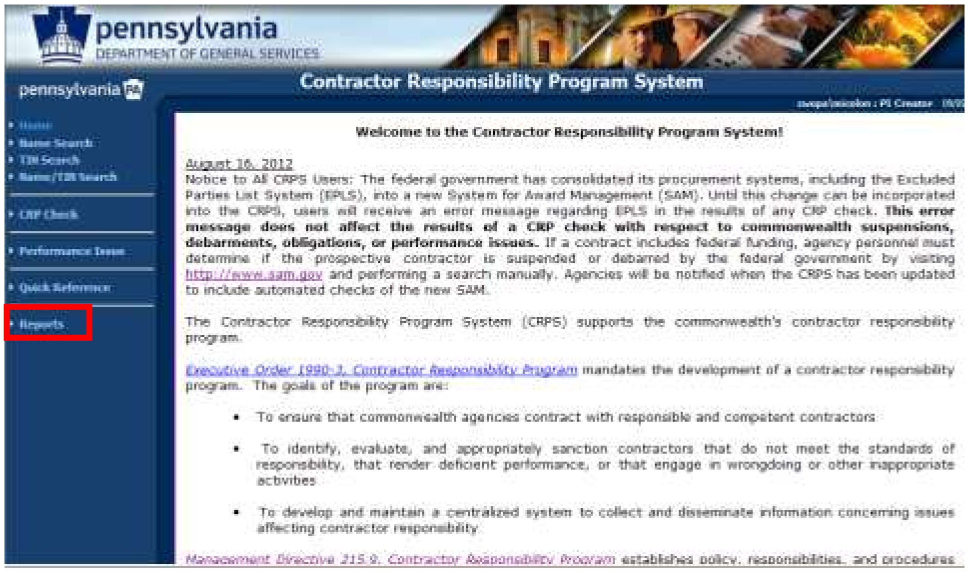
S.No	VendorName	FEDID	SSN	ContactName	ContactPhone
1	1 2 GROW ON CHILDCARE & PRESCHOOL INC	*****7232		OFFICE OF UC TAX SERVICES	8654036163
2	1329 BRISTOL PIKE ASSOCIATES DBA HAMPTON INN	*****0117		OFFICE OF UC TAX SERVICES	8654036163
3	1600 CHURCH ROAD CONDOMINIUM ASSN	*****0006		OFFICE OF UC TAX SERVICES	8654036163
4	3C DRILLING LLC	*****7722		OFFICE OF UC TAX SERVICES	8654036163
5	8G LLC DBA AAMCO	*****5598		OFFICE OF UC TAX SERVICES	8654036163
6	7-ELEVEN INC	*****5131		OFFICE OF UC TAX SERVICES	8654036163
7	A & L CREATIONS INC	*****3243		OFFICE OF UC TAX SERVICES	8654036163
8	A D ANDERSON INC	*****3333		OFFICE OF UC TAX SERVICES	8654036163
9	A HOME AWAY FROM HOME CHRISTIAN DAYCARE INC	*****1319		OFFICE OF UC TAX SERVICES	8654036163
10	A J TRUNZO INC	*****8546		OFFICE OF UC TAX SERVICES	8654036163
11	A NEW ERA SECURITY INC	*****9416		OFFICE OF UC TAX SERVICES	8654036163
12	A ONE AUTO GLASS INC	*****1673		OFFICE OF UC TAX SERVICES	8654036163
13	A R POPPLE INC	*****8516		OFFICE OF UC TAX SERVICES	8654036163

***Note:** The Export and/or Print the CRP Check Certification Form instructions may be used as a guide.

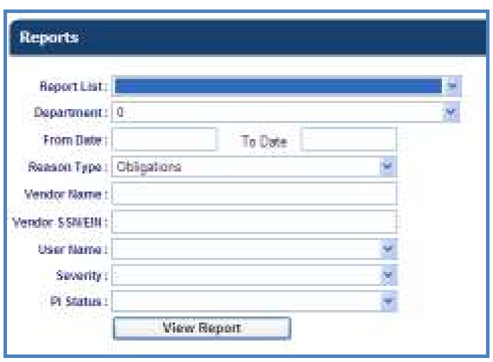
5. Select the ***Back to Reports*** link to return to the CRPS.

Demonstration 3: Execute Performance Issue Report

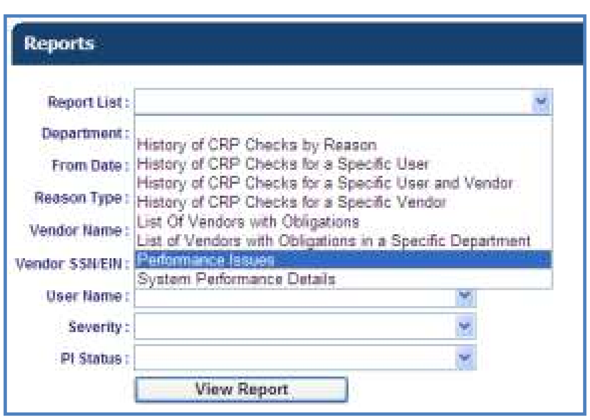
1. Access the CRPS and select the ***Reports*** link on the left navigation pane.



The *Reports* page displays.



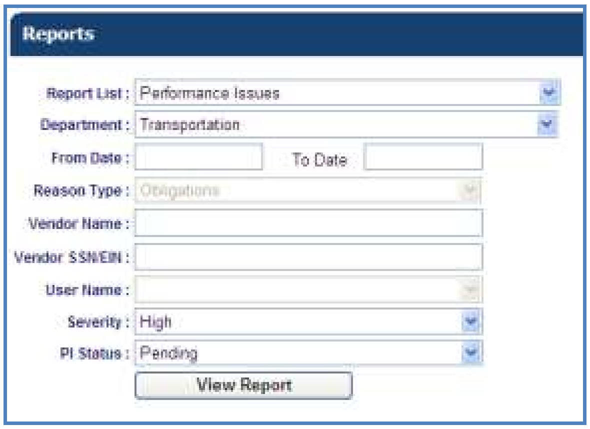
2. Select the dropdown menu in the ***Reports List*** field and choose *Performance Issues*.



The parameters for the report include:

- ***Department*** (Agency)
- ***Severity***
- ***PI Status***

3. Enter the report parameters desired.



The selections in this screenshot will produce a report that includes pending performance issues with a severity of High for the Department of Transportation.

4. Select the ***View Report*** button.

The report displays based on the chosen parameters. You also have the option to export and/or print the report*.

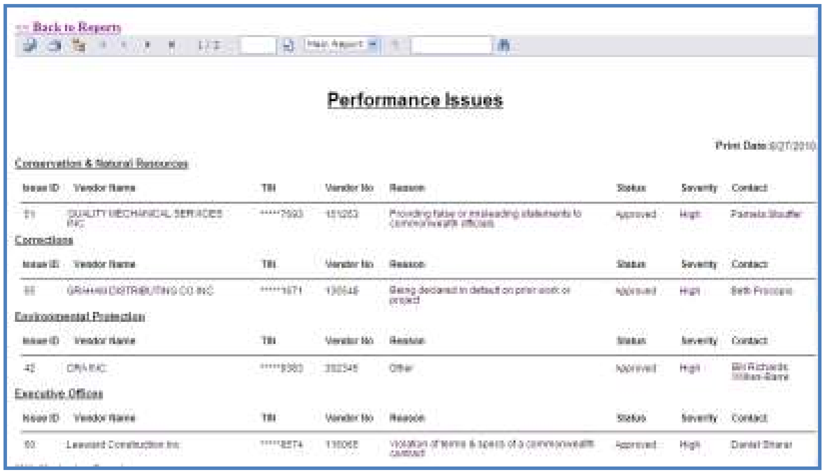
Performance Issues

Print Date 8/27/2010

Transportation

Issue ID	Vendor Name	TIN	Vendor No	Reason	Status	Severity	Contact
45	Acme Steel Co.	*****0703		Damaged Items	Pending	High	Minnie Mouse
54	Buildings Inc.	*****7077		Damaged Items	Pending	High	Mickey Mouse
48	lgr corporation DBA LRG Examinations	*****9098		Vendor nonresponsive to communications from agency	Pending	High	Tim behney
32	MITCHELL S WARREN	*****6345		Being declared in default on prior work or project	Pending	High	Amy Jones
43	SOLAR MASTER FILM CORP	*****4294		Being declared in default on prior work or project	Pending	High	Scooby Doo

Be aware that the default sort (A-Z) of the report is by Agency – as long as it is not included as a parameter (as shown in the previous example).



***Note:** The Export and/or Print the CRP Check Certification Form instructions may be used as a guide.

5. Select the ***Back to Reports*** link to return to the CRPS.