

About Performance Issues

The CRPS provides functionality to support [performance issues](#). Performance issues occur when a [contractor](#) performs unsatisfactorily or deficiently. Failure to carry out or satisfactorily perform all requirements, including compliance with all plans, specifications, service level agreements, terms and conditions of a Commonwealth contract is considered a performance issue. The CRPS includes functionality to create, edit, view, approve, resolve, and delete performance issues in order to support the processes in use within the Commonwealth.

[Users](#) who have the appropriate authority have the ability to enter new performance issues in the system. Once entered, these performance issues must be approved by users with this authorization. Once a performance issue is approved, it is returned in a [CRP Check](#). If the contractor resolves the issue, this information can be recorded by a [performance issue approver](#). Performance issues with a resolved [status](#) are not returned in a CRP Check. All performance issues are stored in the CRPS database along with the [obligation](#) data. The data previously stored in SAP for performance issues has been converted to the new CRPS database.

This chapter will review the following activities:

- [**Entering a Performance Issue**](#)
This function allows authorized users to create performance issues in the system for contractors who are performing unsatisfactorily or delinquent. The entry includes information on who identified the performance issue, the subject of the performance issue including the reason and severity, and information on the contractor. When creating a performance issue, the creator has the option to provide the email address of the approver so that the system can send an email to the approver alerting them to the performance issue.
- [**Searching and Viewing a Performance Issue**](#)
This function allows all CRPS users to execute a search for a performance issue and view the detail information about the performance issue. This search executes separately from the CRP Search, and the results are dependent on the role of the user executing the search for the performance issue.
- [**Editing a Performance Issue**](#)
This function allows certain CRPS users to execute a search for a performance issue and edit the detail information about the performance issue. The ability to edit is dependent on the role of the user in the system.
- [**Approving a Performance Issue**](#)
This function allows authorized users to approve performance issues created in the CRPS. All performance issues entered in the CRPS must be reviewed and approved. Only performance issues with an approved status are returned in a CRP Check. Should the approver find that the performance issue is not valid, the approver has the ability to delete the performance issue. The approver also has the ability to edit approved and resolved performance issues if needed.

- **[Resolving a Performance Issue](#)**
This function allows authorized users to resolve performance issues in the CRPS. Contractors may execute corrective actions that resolve the performance issue with the Commonwealth. In the event that this occurs, the CRPS allows approvers to indicate that the performance issue has been resolved and record the corrective action taken to resolve the performance issue.
- **[Attaching files to a Performance Issue](#)**
This function allows authorized users to attach external files to the performance issue. These files are accessible through the system, and this functionality allows users to provide supporting documentation related to the performance issue in the CRPS.

Within the CRPS, there are two different roles that have access to the performance issue functionality. [PI Creators](#) (Performance Issue Creators) have the ability to create new performance issues for their agency and to edit performance issues with a pending status for their agency. PI Creators are not allowed to approve or resolve performance issues, and they may not edit approved or [resolved performance issues](#). Also, PI Creators do not see pending performance issues for any other agency returned in a search. [PI Approvers](#) (Performance Issue Approvers) have the ability to approve or resolve performance issues. PI Approvers may edit performance issues with an approved or resolved status, but they may not edit performance issues with a pending status.

Entering a Performance Issue

Entering a Performance Issue Overview

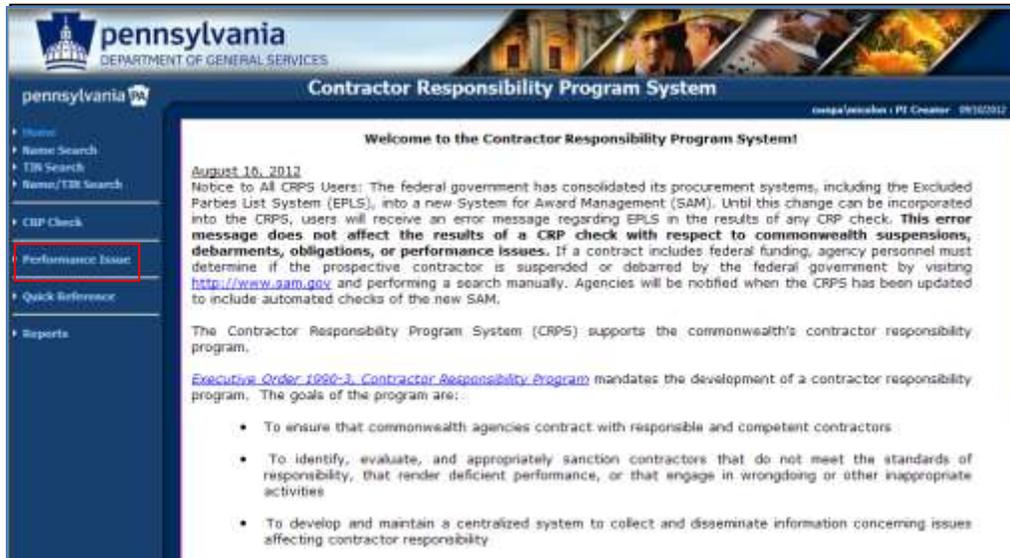
If a contractor has performed unsatisfactorily, a performance issue should be entered into the CRPS. Performance issues may be entered by users with the PI Creator role. The entry includes information on who identified the performance issue, the subject of the performance issue including the reason and [severity](#), and information on the contractor. When entering a performance issue, the PI Creator has the option to provide the email address of the approver so that the system can send an email to the approver alerting them to the performance issue.

Entering a Performance Issue At-A-Glance

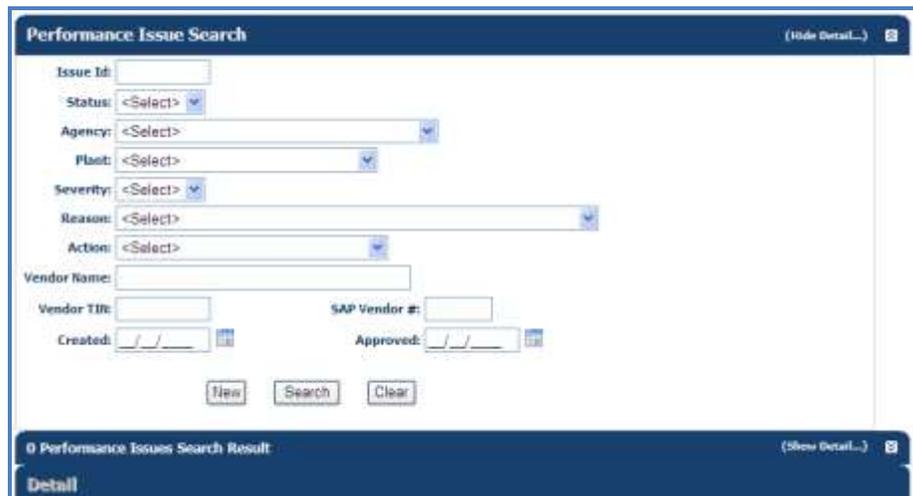
User	PI Creator	PI Approver	Administrator	Task/Demo
	X		X	<p>Enter a performance issue:</p> <ul style="list-style-type: none"> ➤ When a new performance issue is entered in the CRPS, the status is automatically set to Pending and the Agency is automatically set to the agency that you are assigned to. Also, the person creating the issue is automatically completed with your username and the data is populated with today's date. ➤ Data regarding the performance issue needs to be entered including the reason for the performance issue, the severity of the performance issue, and who should be contacted regarding the performance issue. ➤ The contractor's information may be completed using the SAP Vendor Number and executing the SAP Lookup in the CRPS, or the contractor's information can be entered. ➤ To notify the performance issue approver that the performance issue is complete and ready for approval, you may complete the Approver email section and the system automatically sends any emails when the performance issue is saved. ➤ A Description of the performance issue must be supplied. ➤ The performance issue can be printed if a paper copy is needed.

Demonstration: Enter a Performance Issue

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



The Performance Issue Search page displays.



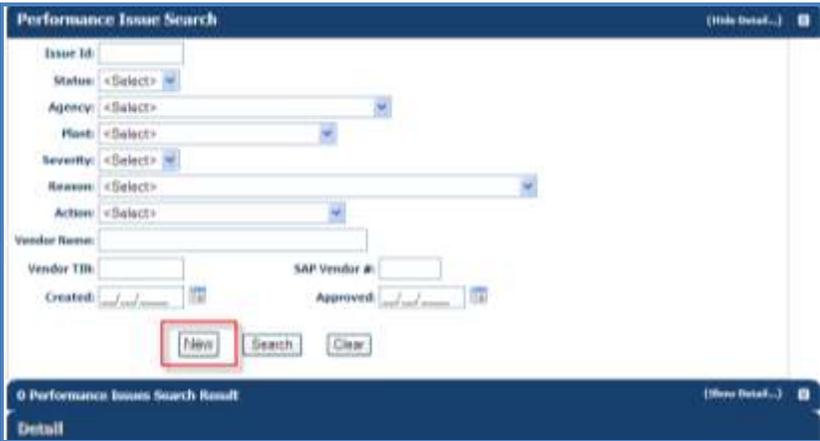
The 'Performance Issue Search' form includes the following fields and controls:

- Issue Id:
- Status:
- Agency:
- Plant:
- Severity:
- Reason:
- Action:
- Vendor Name:
- Vendor TIR:
- SAP Vendor #:
- Created:
- Approved:

Buttons: New, Search, Clear

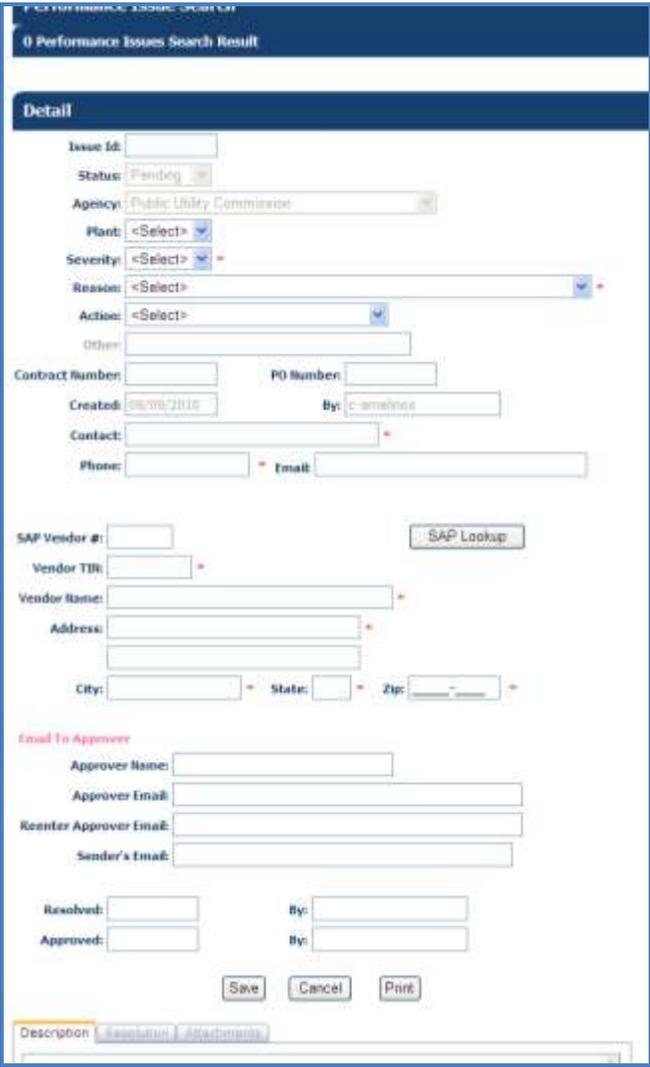
Results: 0 Performance Issues Search Result

2. Select the **New** button.



The screenshot shows the 'Performance Issue Search' form. At the bottom of the form, there are three buttons: 'New', 'Search', and 'Clear'. The 'New' button is highlighted with a red rectangular box. Above the buttons are various search criteria including dropdown menus for Status, Agency, Plant, Severity, Reason, and Action, and text input fields for Vendor Name, Vendor TIB, SAP Vendor #, Created, and Approved.

The *Detail* portion of the Performance Issue page expands.



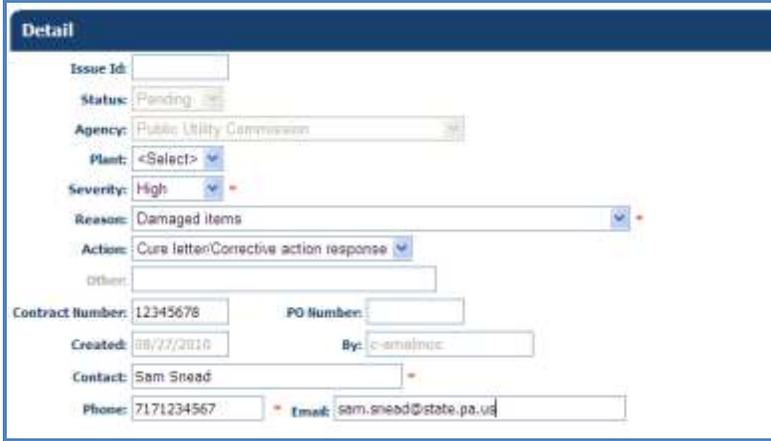
The screenshot shows the expanded 'Detail' section of the Performance Issue page. It contains a comprehensive set of form fields for data entry. Fields include: Issue Id, Status (set to 'Pending'), Agency (set to 'Public Utility Commission'), Plant, Severity, Reason, Action, Order, Contract Number, PO Number, Created (08/09/2010), By (c-smalins), Contact, Phone, Email, SAP Vendor #, Vendor TIB, Vendor Name, Address, City, State, and Zip. There is also a 'SAP Lookup' button. Below these fields are sections for 'Email To Approver' (with fields for Approver Name, Approver Email, Reenter Approver Email, and Sender's Email) and 'Resolved' and 'Approved' status fields (each with a 'By' field). At the bottom, there are 'Save', 'Cancel', and 'Print' buttons, and a 'Description' field with a 'Resolution' and 'Attachments' sub-section.



The Status of the performance issue automatically defaults to *Pending* and the **Agency** defaults to the agency to which you are assigned. In addition, the **Created** and **By** fields are completed by the system with the username of the person creating the performance issue and today's date. These fields cannot be changed.

3. Enter the following fields:

- **Plant (Optional):** The values that populate this dropdown list are the values used for Plant in SAP. The values are filtered to those plant values assigned to the agency to which you are assigned. Select a value in this field if desired.
- **Severity (* Required):** Select from *High*, *Medium*, and *Low*.
- **Reason (* Required):** Select from the values provided to indicate the reason for the performance issue.
- **Action (Optional):** Select from the values provided to indicate the action that has been taken as a result of the performance issue. If the Action that has been taken is something other than what is listed, choose *Other*. Then, in the *Other* field, record the action that has been taken.
- **Contract Number (Optional):** If the performance issue is related to a contract, you may enter the contract number in this field.
- **PO Number (Optional):** If the performance issue is related to a purchase order, you may enter the purchase order number in this field.
- **Contact (* Required):** Enter the name of the person that should be contacted regarding this performance issue.
- **Phone (* Required):** Enter the phone number of the contact person.
- **Email (Optional):** Enter the email address for the contact person if available.



Detail

Issue Id:

Status: Pending

Agency: Public Utility Commission

Plant: <Select>

Severity: High

Reason: Damaged Items

Action: Cure letter/Corrective action response

Other:

Contract Number: 12345678 PO Number:

Created: 08/22/2010 By: c-smalnoc

Contact: Sam Smead

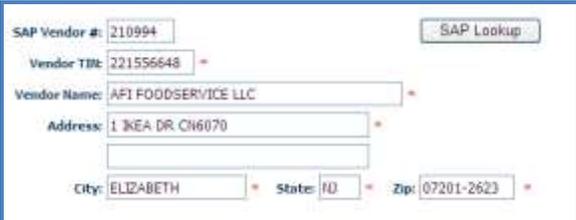
Phone: 7171234567 Email: sam.smead@state.pa.us

4. Enter the contractor information.

Option 1: Enter an **SAP Vendor number** and select the **SAP Lookup** button.



The data for the contractor is populated with information stored in SAP.



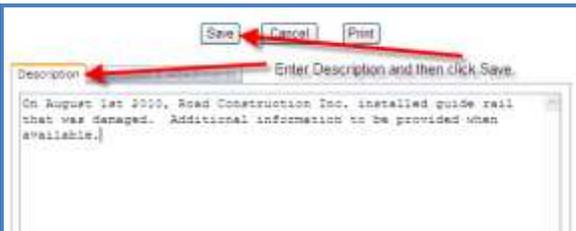
Option 2: If the contractor is not a registered vendor, you will need to enter the Contractor information in the appropriate fields. **Vendor TIN, Name, Address, City, State, and Zip** are required fields.



5. Complete the fields necessary for the system to send a notification to the PI Approver: **Approver Name, Approver Email** (twice), and your email (**Sender's Email**).

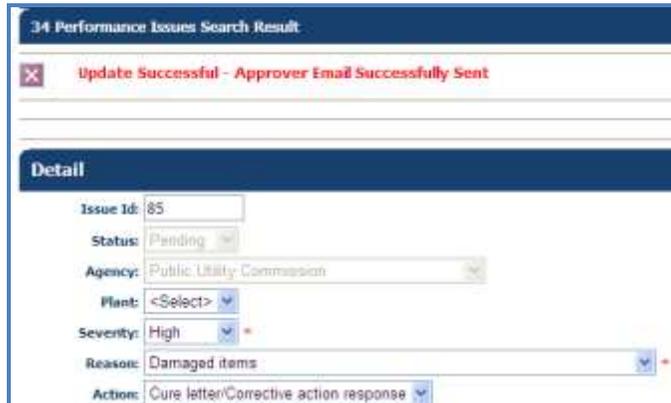


6. Enter a **Description** of the performance issue and select the **Save** button.



 As needed, [external files may be attached to the performance issue](#) via the **Attachments** tab.

The confirmation message “Update Successful” displays; and the **Issue ID** field auto-populates with the ID assigned to this performance issue. In addition, the email notification is sent to the approver.



 If an invalid email address is entered in the approver email section, then an error message displays when the performance issue is saved.



If the email is undeliverable, then the sender email address provided receives the undeliverable email. If no sender email address is provided, the undeliverable email is received by the OA-CRPS resource account.

7. Select the **Cancel** button to return to the Performance Issue Search.



 If desired, you may print a formatted version the performance issue using the **Print** button.



The screenshot shows the top of a performance issue form. At the top right, there are three buttons: "Save", "Cancel", and "Print". The "Print" button is highlighted with a red box. Below the buttons is a text area with the description: "On August 1st 2010, Road Construction Inc. installed guide rail that was damaged. Additional information to be provided when available."

The performance issue displays. You may [Export and/or Print](#) the results.

[Back To Performance Issues](#)

Print Report

Performance Issue

Print Date: 9/15/2010

Issue ID: 139	Status: Approved
User Name: jcomstros	Created: 10/09/2010
Contact: Dan Street	Phone: 7171234567 Email: dan.street@state.pa.us

PERFORMANCE ISSUE DETAILS

Agency: Public Works Commission	Severity: High
Reason: Damaged Items	
Contract Number: 12345678	PO Number:

Description:
On August 1st 2010, Road Construction in the residential zone had that was damaged. Additional information to be provided when available.

VENDOR INFORMATION

Name: Road Construction Inc.	SAP #:
TIN: 123456789	Address 1:
Address 1: 1 Main Street	Address 2:
City: Harrisburg	State: PA ZIP: 17211-891

Approved By: jcomstros	Resolved By:
Approved Date: 10/09/2010	Resolved Date:

Resolved Description:

Searching for a Performance Issue

Searching for Performance Issue Overview

The performance issue functionality in the CRPS includes the ability to search the performance issues stored in the CRPS and is available to all users. This is unrelated to a [CRP Check](#) or [CRP Search](#). The search criteria available include most of the fields stored for a performance issue; however, the results returned depend on the role of the user executing the search. The results only include approved and resolved performance issues for users with the User role. The results include performance issues with a status of *Pending* for the user's assigned agency and all other performance issues with a status of *Approved* or *Resolved* for users with the PI Creator role. The results include all performance issues regardless of agency and status for users with the PI Approver role. The display of the search results varies depending on the role that you are assigned and the rules established in the system.

This section will review the following activities:

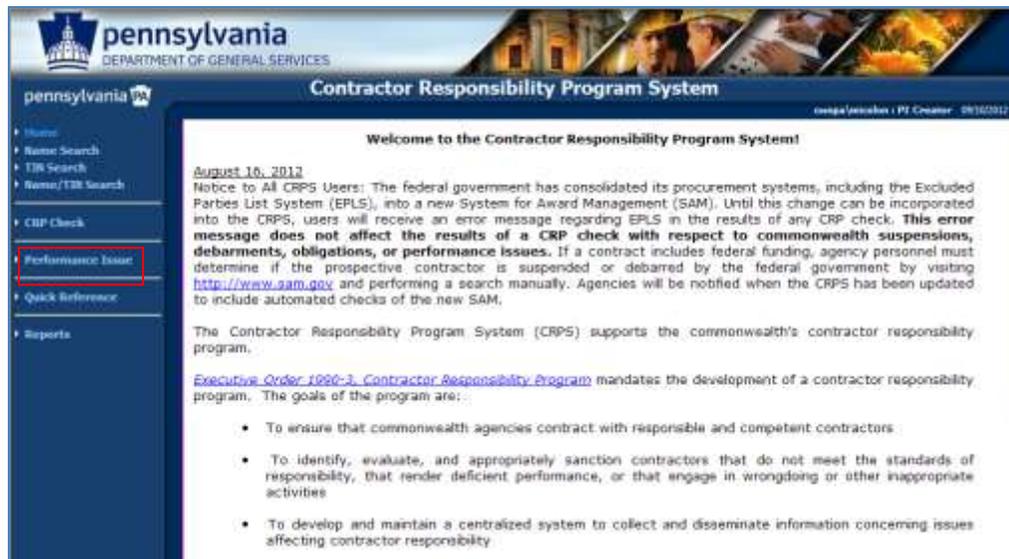
1. [Execute a Performance Issue Search](#)
2. [View Search Results](#)

Searching for Performance Issue At-A-Glance

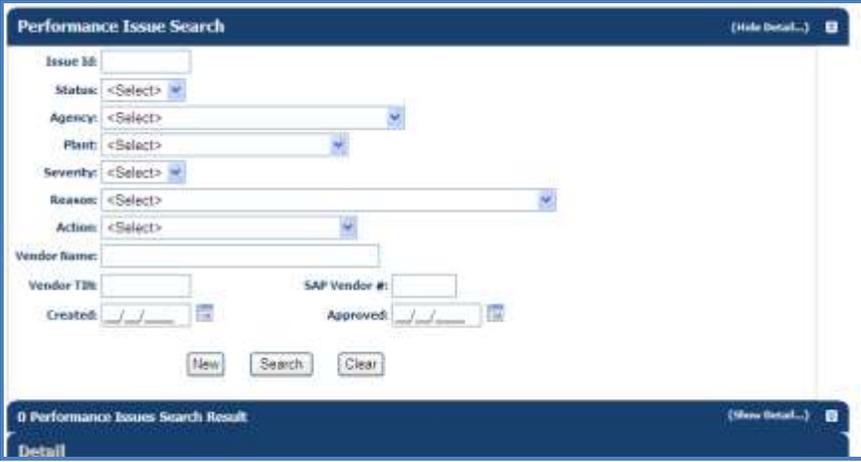
User	PI Creator	PI Approver	Administrator	Task/Demo
X	X	X	X	<p>1. Execute a Performance Issue Search</p> <ul style="list-style-type: none"> ➤ Performance issues may be searched by users with any of the available roles; however, the results displayed depend on the user's role. ➤ Most of the fields stored for a performance issue may be searched. The more search criteria entered, the narrower the search and the fewer the results. ➤ Users with a PI Approver role see all performance issues and have the ability to edit and approve any performance issue returned in the results. ➤ Users with a PI Creator role see all approved and resolved performance issues and have the ability to view these records. The only pending performance issues the user sees are those that are for the same agency to which the user is assigned. ➤ Users with the User role see only performance issues with an approved or resolved status.
X	X	X	X	<p>2. View Search Results</p> <ul style="list-style-type: none"> ➤ The search results may be sorted by selecting column headings. Each time the heading is selected, the order changes from ascending to descending and back again. ➤ The number of pages of results displays at the bottom of the page, and the arrows may be used to navigate through the results. ➤ For those users with view rights only, a View button is visible for the performance issue. When displayed, the performance issue fields are either grayed out or read only and the ability to save is not available. ➤ For those users with edit rights, a View button is not visible. Instead, use the Edit button and when you finished viewing the performance issue, cancel out of the performance issue and no data is saved.

Demonstration 1: Execute a Performance Issue Search

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



The Performance Issue Search page displays.

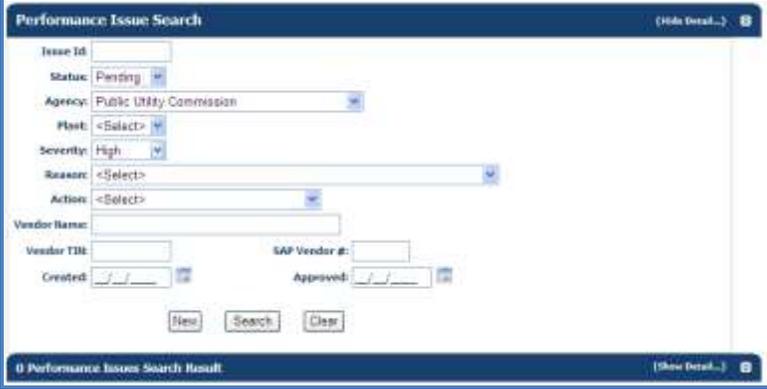


2. Enter the desired search criteria. The fields available for search are:

- Issue ID
- Status
- Agency
- Plant
- Severity
- Reason
- Action
- Vendor Name
- Vendor TIN
- SAP Vendor Number

- Created
- Approved

You may enter more than one search criteria to narrow your search; the more criteria, the fewer the results.



Performance Issue Search [Hide Detail...]

Issue Id:

Status: Pending

Agency: Public Utility Commission

Plant: <Select>

Severity: High

Reason: <Select>

Action: <Select>

Vendor Name:

Vendor TID: SAP Vendor #:

Created: Approved:

[New] [Search] [Clear]

0 Performance Issues Search Result [Show Detail...]

3. Select the **Search** button.

If no results are found for the search and the role you have in the system is PI Creator, the following will display:



Performance Issue Search [Hide Detail...]

Issue Id:

Status: Approved

Agency: Public Utility Commission

Plant: <Select>

Severity: <Select>

Reason: <Select>

Action: <Select>

Vendor Name:

Vendor TID: SAP Vendor #:

Created: Approved:

[New] [Search] [Clear]

0 Performance Issues Search Result [Hide Detail...]

No Records Found [New]

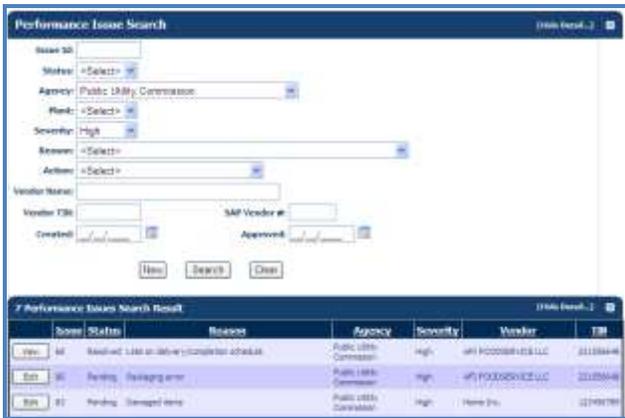
If no results are found for the search and the role you have in the system is either **PI Approver** or **User**, the following will display:



The screenshot shows the 'Performance Issue Search' form with various filters. At the bottom, the search results area displays '0 Performance Issues Search Result' and 'No Records Found'.

Proceed with the next search. Edit the existing criteria as needed, or select the **Clear** button and enter new criteria.

If results are found, the following is displayed:



The screenshot shows the same search form with 7 results. Below the form is a table of results:

Score	Status	Reason	Agency	Severity	Vendor	TIN
100	Resolved	100% on delivery/computer crashes	Public Utility Commission	High	WPI POWERHOUSE LLC	21128448
100	Pending	Repackaging error	Public Utility Commission	High	WPI POWERHOUSE LLC	21128448
100	Resolved	Shipped items	Public Utility Commission	High	Home Pro	22749759



The view of search results varies depending on the user's role:

For users with the **PI Creator** role:

- Edit performance issues for your agency with a status of pending
- View performance issues for any agency with a status of approved or resolved

For users with the **PI Approver** role:

- Edit all performance issues regardless of agency and status

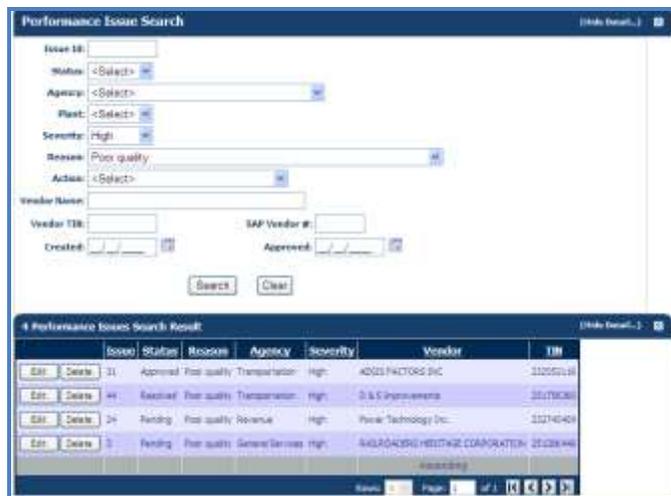
For users with the **User** role:

- View PIs for any agency with a status of approved or resolve.

The PI Creator executing the search illustrated below is assigned to the Public Utility Commission. Therefore, the user is able to **Edit** the pending PIs at the bottom. The other two performance issues are approved and resolved respectively and the PI Creator only has the ability to **View** these.



The PI Approver executing the search illustrated below is assigned to the Public Utility Commission and is able to edit/delete all performance issues regardless of the agency or status. **(PI Approvers should not edit/delete) PIs created outside of their organization)**



The User executing the search illustrated below is assigned to the Public Utility Commission and is able to view approved and resolved performance issues regardless of agency. No pending performance issues are displayed.



Demonstration 2: View Search Results

1. [Execute Demonstration 1](#): Execute a Performance Issue Search.
2. To sort the results, select a column heading. The column data will sort in ascending or descending order, depending on the number of times the column heading is selected. The bottom row of the page indicates which column the results are sorted by and the order. To navigate through multiple pages of results, use the buttons in the bottom right corner.



Issue#	Status	Reason	Agency	Severity	Vendor	IIR
View 5	Approved	Delayed items	PA Marketing Board	High	Fast Company	12345678
View 12	Approved	Delayed items	PA Marketing Board	High	THE UNIVERSAL GROUP INC	23456789
View 21	Approved	Real quality	Transportation	High	8822 FACTORS INC	34567890
View 39	Approved	Delayed items	Transportation	High	Hecox	45678901
View 42	Approved	Other	Documents Protection	High	DSA INC	56789012
View 51	Approved	Printing false or misleading statements in correspondence or fliers	Conservation & Natural Resources	High	SLATTI MECHANICAL SERVICES INC	67890123
View 55	Approved	Being declared in default on prior work or project	Construction	High	SEAMAN CONSULTING CO INC	78901234
View 56	Approved	Delayed items	Transportation	High	CHICO CONTRACTING CO INC	89012345
View 57	Approved	Relaying error	Transportation	High	Lumber Co	90123456
View 69	Approved	Late or before completion schedule	Transportation	High	Buildings, Inc	01234567
View	Pending					

(In this example, the Status column is the column used for sorting. Note that Ascending appears in the column at the bottom.)

3. Select either the **View** or **Edit** button, depending on the role you have in the system and the performance issue you wish to open.

Editing a Performance Issue

Editing a Performance Issue Overview

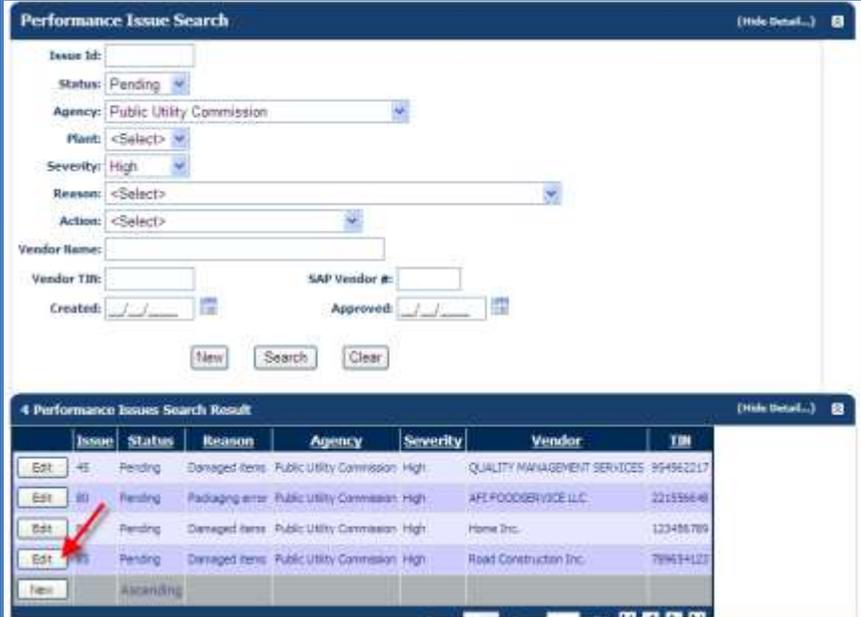
The ability to edit a performance issue is role-specific in the CRPS. Users with the role of PI Creator have the ability to edit performance issues for their agency with a status of *Pending*, but they do not have the ability to edit any other performance issues. Users with the role of PI Approver have the ability to edit approved and resolved performance issues. Users with the role of PI Approver may open a performance issue in edit mode with a status of *Pending*, but any attempt to save the performance issue without changing the status to *Approved* or *Resolved* will result in an error.

Editing a Performance Issue At-A-Glance

User	PI Creator	PI Approver	Administrator	Task/Demo
	X	X	X	<p>Editing a performance issue</p> <ul style="list-style-type: none"> ➤ A performance issue with a status of <i>Pending</i> may only be edited by users with the role of PI Creator. Users with the role of PI Approver may not edit performance issues with a status of <i>Pending</i>. ➤ Users with the role of PI Approver may edit performance issues with a status of <i>Approved</i> or <i>Resolved</i>. ➤ Users with the role of PI Creator may only edit performance issues assigned to their agency. ➤ The approver email functionality is available when editing a performance issue for those performance issues with a status of <i>Pending</i>. ➤ Once a performance issue has been approved or resolved, it cannot be changed to a status of <i>Pending</i>.

Demonstration: Edit a Performance Issue

1. [Execute Demonstration 1 from the previous section](#): Execute a search.
2. Select the **Edit** button for the performance issue you wish to edit.



Issue	Status	Reason	Agency	Severity	Vendor	TIN
45	Pending	Damaged items	Public Utility Commission	High	QUALITY MANAGEMENT SERVICES	954562217
60	Pending	Padding error	Public Utility Commission	High	AFLFOODSERVICE LLC	221556648
75	Pending	Damaged items	Public Utility Commission	High	Home Inc.	123456789
80	Pending	Damaged items	Public Utility Commission	High	Road Construction Inc.	789012345
	Ascending					

3. Edit the information for the performance issue as desired.



Users with the PI Creator role may edit performance issues that have a *pending* status and are assigned to the agency to which they are assigned. Users with the PI Creator role cannot edit approved or resolved performance issues.

Users with the PI Approver role may edit performance issues with an *approved* or *resolved* status. Users with the PI Approver role may not edit performance issues with a *pending* status except to change the status from *Pending* to *Approved* or *Resolved*. If a PI Approver attempts to edit a *Pending* performance issue without changing the status to *Resolved* or *Approved*, an error message results.



When editing a performance issue with a *pending* status, the approver email fields may be completed each time the performance issue is edited. Once the performance issue is approved or resolved, an email to the approver is not possible.

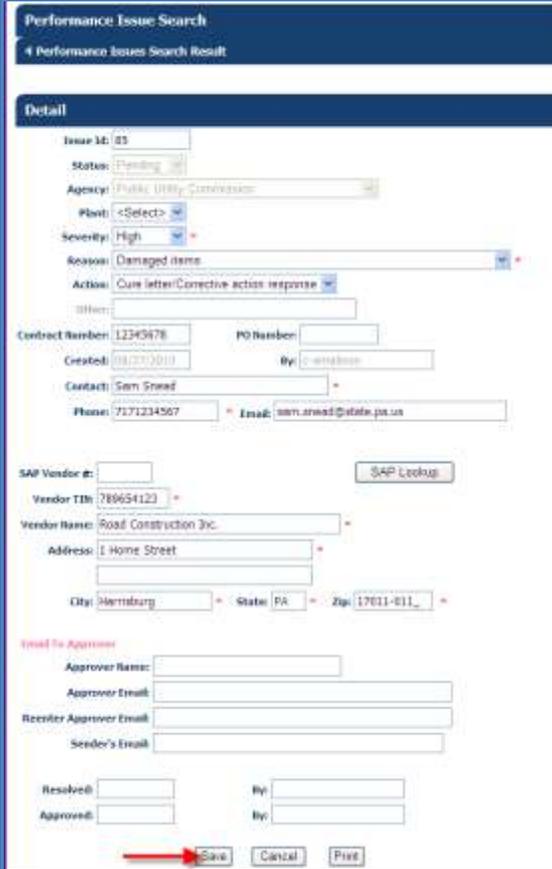


A performance issue with an *approved* or *resolved* status cannot be changed to a *pending* status.



As needed, [external files may be attached to the performance issue](#) via the **Attachments** tab.

- Select the **Save** button to save the changes to the performance issue.



Performance Issue Search
4 Performance Issues Search Result

Detail

Issue ID: 85
 Status: Pending
 Agency: Public Utility Commission
 Plant: <Select>
 Severity: High
 Reason: Damaged items
 Action: Cure letter/Corrective action response
 Contract Number: 12345678 PO Number:
 Created: 08/27/2010 By:
 Contact: Sam Sneed
 Phone: 7171234567 Email: sam.sneed@state.pa.us

SAP Vendor #: SAP Lookup
 Vendor TID: 789054123
 Vendor Name: Road Construction Inc.
 Address: Home Street
 City: Harrisburg State: PA Zip: 17011-011

Send To Approver
 Approver Name:
 Approver Email:
 Receiver Approver Email:
 Sender's Email:

Resolved: By:
 Approved: By:

Save Cancel Print

The confirmation message “Updated Successfully” will display.



If desired, you may print a formatted version the performance issue using the **Print** button.



The performance issue displays. You may [Export and/or Print](#) the results.



Approving a Performance Issue

Approving a Performance Issue Overview

The approving of performance issues is restricted to those users with the role of PI Approver. This is a role that very few people in the CRPS have and should be restricted to [Designated Senior Managers](#) (DSM). Approving a performance issue requires editing the performance issue and changing the status to *approved*. If the performance issue is not valid and should not be retained, then it can be deleted.

If the performance issue is for a [statewide contract](#), final approval must be received by DGS. Therefore, the agency's approver should review the performance issue to ensure its accuracy and validity and then notify DGS. The CRPS has a built in email feature that will notify DGS so that they can then approve the performance issue.

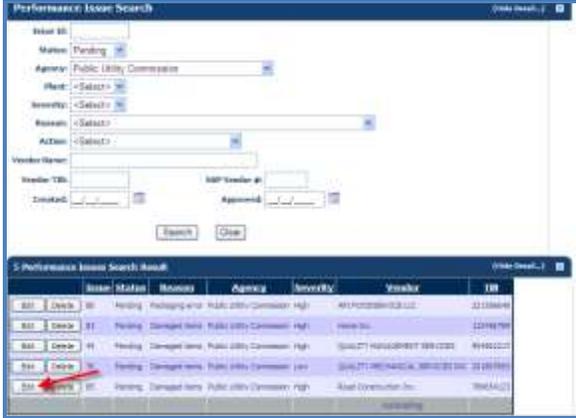
Once a performance issue is approved, it is returned in a CRP Check for that contractor.

Approving a Performance Issue At-A-Glance

User	PI Creator	PI Approver	Administrator	Task/Demo
		X	X	Approve a Performance Issue <ul style="list-style-type: none"> ➤ Approving a performance issue in the CRPS requires changing the status of the performance issue to <i>approved</i>. The system records your username and today's date in the approval information. ➤ If the performance issue is for a statewide contract, then the agency's approver should review the performance issue to ensure its correctness and validity. The CRPS provides the ability to send an email to DGS alerting them of the performance issue so that they can approve it in the system. ➤ If the performance issue should not be retained, the PI Approver has the ability to delete it.

Demonstration: Approve a Performance Issue

1. [Execute Demonstration 1 from the search section](#): Execute a search. This search should be for a performance issue you wish to approve. The suggested search is to use the Issue ID number supplied in the email.
2. Select the **Edit** button for the performance issue you wish to approve.

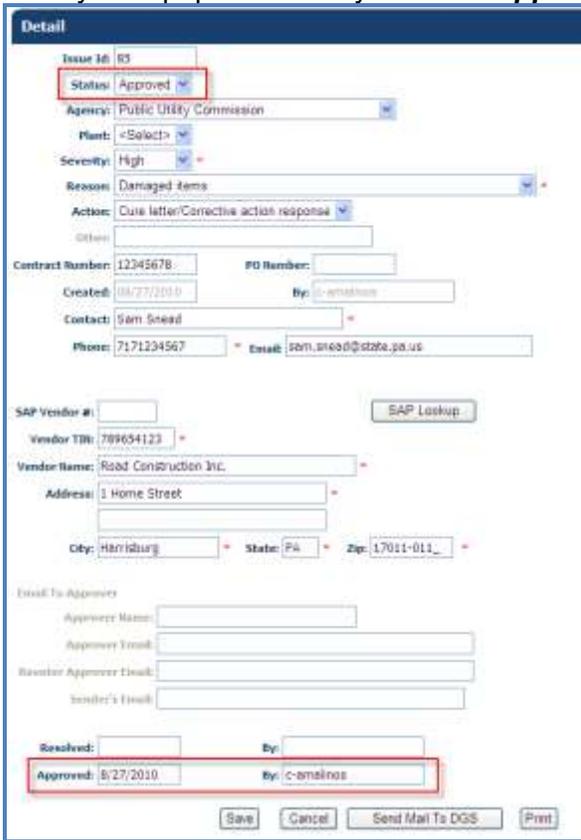


Performance Issue Search Results

Issue ID	Status	Reason	Agency	Severity	Vendor	ID
85	Pending	Damaged items	Public Utility Commission	High	ROAD CONSTRUCTION INC	22338894
86	Pending	Damaged items	Public Utility Commission	High	ROAD CONSTRUCTION INC	22338895
87	Pending	Damaged items	Public Utility Commission	High	ROAD CONSTRUCTION INC	22338896
88	Pending	Damaged items	Public Utility Commission	High	ROAD CONSTRUCTION INC	22338897
89	Pending	Damaged items	Public Utility Commission	High	ROAD CONSTRUCTION INC	22338898

3. Change the **Status** field to *Approved*.

The system populates today's date in **Approved** and your user ID populates the **By** field.



Detail

Issue ID: 85

Status: **Approved**

Agency: Public Utility Commission

Plant: <Select>

Severity: High

Reason: Damaged items

Action: Cure letter/Corrective action response

Contract Number: 12345678

Created: 08/27/2010

Contact: Sam Snead

Phone: 7171234567

Email: sam.snead@state.pa.us

SAP Vendor #: []

Vendor TIN: 789054123

Vendor Name: Road Construction Inc.

Address: 1 Home Street

City: Harrisburg

State: PA

Zip: 17011-0111

Approved: 8/27/2010

By: c-arnold

Buttons: Save, Cancel, Send Mail To DGS, Print



As needed, [external files may be attached to the performance issue](#) via the **Attachments** tab.

4. Select the **Save** button.

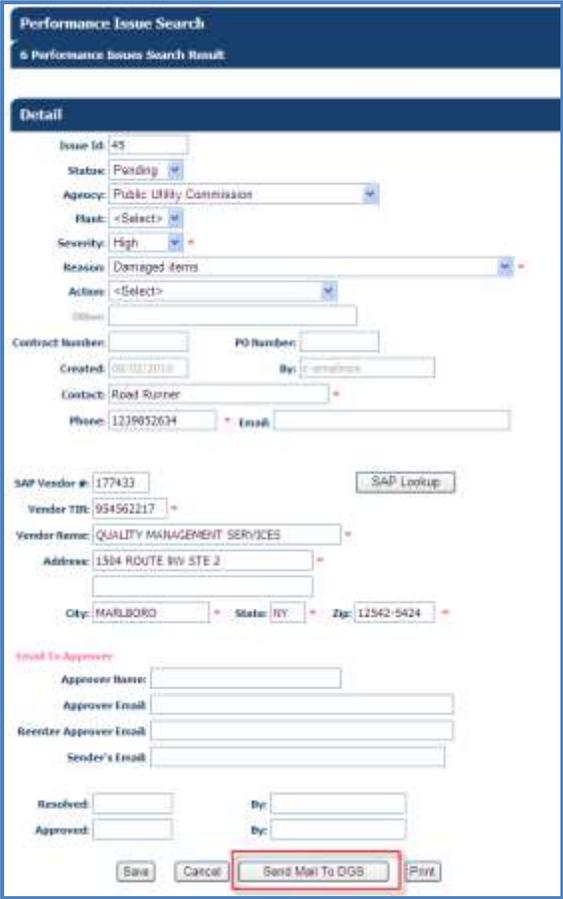
The confirmation message “Update Successful” displays.



5. Select the **Cancel** button to return to the performance issue search results.



If the performance issue to be approved is for a statewide contract, then you should review the performance issue and ensure its satisfactory completion. If it is satisfactory, select the **Send Email to DGS** button. The system then sends an email to the resource account established at DGS to notify them that the performance issue should be approved. DGS would then edit the performance issue and change the status to *Approved*.



After selecting the **Send Email to DGS** button, select the **Cancel** button.



SAP Vendor #: 177433 SAP Lookup

Vendor Title: 95492217

Vendor Name: QUALITY MANAGEMENT SERVICES

Address: 1304 ROUTE SW STE 2

City: MARLBORO State: NY Zip: 12542-5424

Send To Approver

Approver Name: _____

Approver Email: _____

Receiver Approver Email: _____

Sender's Email: _____

Resolved: _____ By: _____

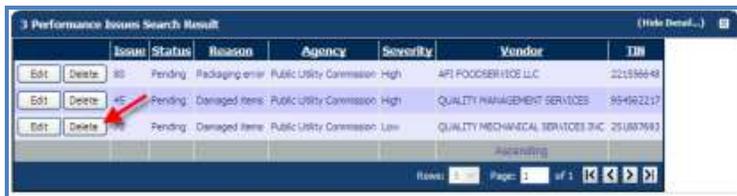
Approved: _____ By: _____

Save **Cancel** Send Mail To DGS Print

Delete

If the performance issue should not be retained, users with the PI Approver role have the ability to delete performance issues.

1. Select the **Delete** button for the performance issue to be deleted (as opposed to **Edit**).



Issue	Status	Reason	Agency	Severity	Vendor	TIN	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	80	Pending	Packaging error	Public Utility Commission	High	API FOODSERVICE LLC	22159648
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	45	Pending	Damaged items	Public Utility Commission	High	QUALITY MANAGEMENT SERVICES	95492217
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	45	Pending	Damaged items	Public Utility Commission	Low	QUALITY MECHANICAL SERVICES INC	25087993

Rows: 3 Page: 1 of 1

2. A dialog box prompting a confirmation of the deletion will display. Select the **Continue** button if you wish to continue with deleting the performance issue.



Are you sure you want to delete?

Performance Issue: 70

Status: Pending

Agency: Public Utility Commission

Vendor: QUALITY MECHANICAL I

A message displays that the record was successfully deleted.



Issue	Status	Reason	Agency	Severity	Vendor	TIN	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	80	Pending	Packaging error	Public Utility Commission	High	API FOODSERVICE LLC	22159648
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	45	Pending	Damaged items	Public Utility Commission	High	QUALITY MANAGEMENT SERVICES	95492217

Rows: 3 Page: 1 of 1

Performance #70
Abbreviation: Public Utility Commission
Name: QUALITY MECHANICAL SERVICES INC
Deleted Successfully

Alternately, select **Cancel** to cancel the deletion of the performance issue and return to the search results.

Resolving a Performance Issue

Resolving a Performance Issue Overview

If a contractor has taken the necessary steps to rectify the problem that caused the performance issue, then the performance issue can be resolved in the system. This means that the performance issue is not returned when a CRP Check is executed for the contractor.

The system provides the ability to resolve a performance issue by changing the status of the performance issue to *resolved*. The system records your username and today's date in the resolution information and requires that you complete a description of the action taken to resolve the performance issue. Users with the role of PI Approver have the ability to resolve performance issues. If the performance issue is no longer needed or as part of the resolution an agreement has been made to expunge the contractor's record, the performance issue can be deleted.

Resolving a Performance Issue At-A-Glance

User	PI Creator	PI Approver	Administrator	Task/Demo
		X	X	Resolve a Performance Issue <ul style="list-style-type: none"> ➤ A user with a role of PI Approver may resolve a performance issue by changing the status of the performance issue to <i>Resolved</i>. The system captures the username and date of the resolution and requires the user to complete a description of the resolution. ➤ If needed, a user with the role of PI Approver may delete the performance issue rather than resolve it. ➤ A performance issue with a status of <i>resolved</i> is not returned in a CRP Check of the contractor.

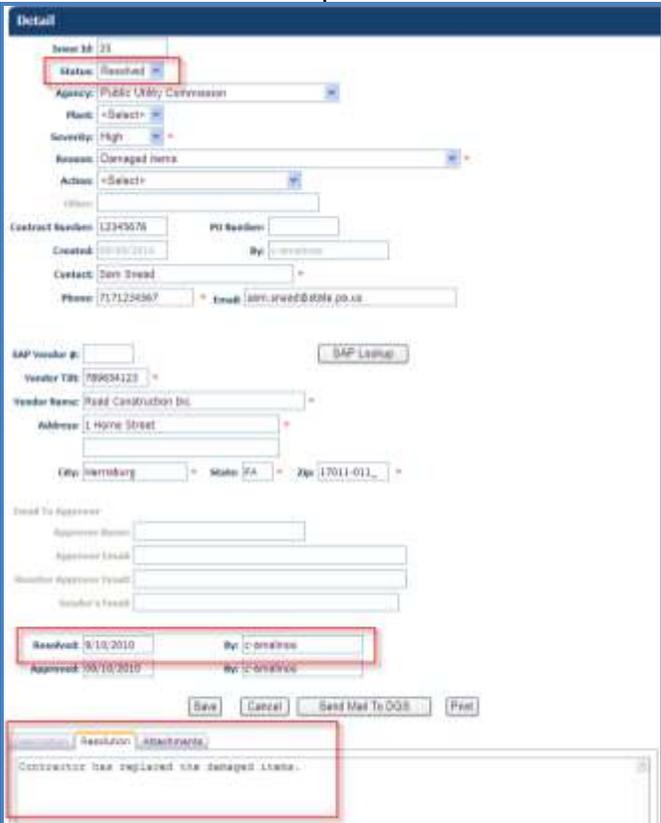
Demonstration: Resolve a Performance Issue

1. [Execute Demonstration 1 from the search section](#): Execute a search. This search should be for a performance issue you wish to resolve. .
2. Select the **Edit** button for the performance issue you wish to resolve.



Issue	Status	Reason	Agency	Severity	Vendor	TID
23	Approved	Damaged Item	Public Utility Commission	High	Road Construction Inc.	78904123

3. Change the Status field to **Resolved**. The system populates today's date in **Resolved** and your user ID populates the **By** field.
4. In the **Resolution** text box, enter a description of the circumstances/actions taken by the contractor to resolve the performance issue.



Detail

Issue ID: 23

Status: **Resolved**

Agency: Public Utility Commission

Plant: <Select>

Severity: High

Reason: Damaged Item

Action: <Select>

Contract Number: 12345678 PI Number: (empty)

Created: 9/10/2010 By: jordan

Contact: Sam Speed Phone: 7171234567 Email: sam.speed@pa.gov

SAP Vendor #: (empty) Vendor TID: 78904123 Vendor Name: Road Construction Inc. Address: 1 Home Street City: Harrisburg State: PA Zip: 17011-0111

Resolved: 9/10/2010 By: jordan

Approved: 9/10/2010 By: jordan

Resolution: Contractor has replaced the damaged item.



As needed, [external files may be attached to the performance issue](#) via the **Attachments** tab.

5. Select the **Save** button.

The confirmation message “Update Successful” displays.

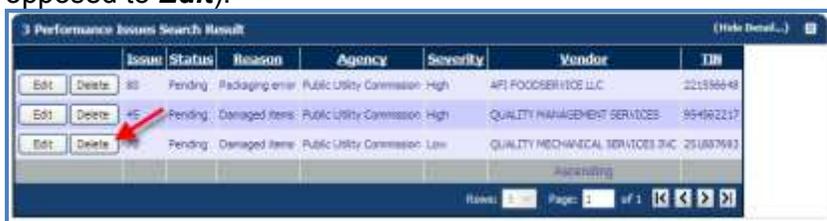


6. Select the **Cancel** button to return to the performance issue search results.

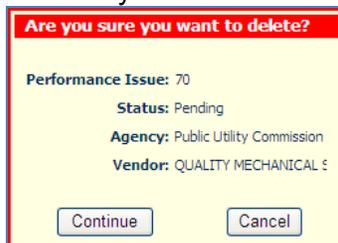
Delete

If the performance issue should not be retained, users that have the PI Approver role have the ability to delete performance issues.

1. Select the **Delete** button for the performance issue to be deleted (as opposed to **Edit**).



2. A dialog box prompting a confirmation of the deletion will display. Select the **Continue** button if you wish to continue with deleting the performance issue.



A message displays that the record was successfully deleted.



Alternately, select **Cancel** to cancel the deletion of the performance issue and return to the search results.

Attaching Files to a Performance Issue

Attaching Files to a Performance Issue Overview

The performance issue functionality includes the ability to upload external files to the CRPS and associate those files with a specific performance issue. These files are intended to provide supplemental information about the performance issue. The system allows Word documents, pdf files and image files (.png, .gif, .jpg and .bmp) to be uploaded.

Files may be attached by PI Creators and PI Approvers. The PI Creator has the ability to attach files to a performance issue with a *pending* status for the agency to which he/she is assigned. Once the status of the performance issue is changed to *approved* or *resolved*, the PI Creator can no longer attach files. The PI Approver has the ability to attach files to performance issues with an *approved* or *resolved* status.

This section will review the following activities:

1. [Attach files to a performance issue](#)
2. [Remove file attachments](#)
3. [Open file attachments](#)

Attaching Files to a Performance Issue At-A-Glance

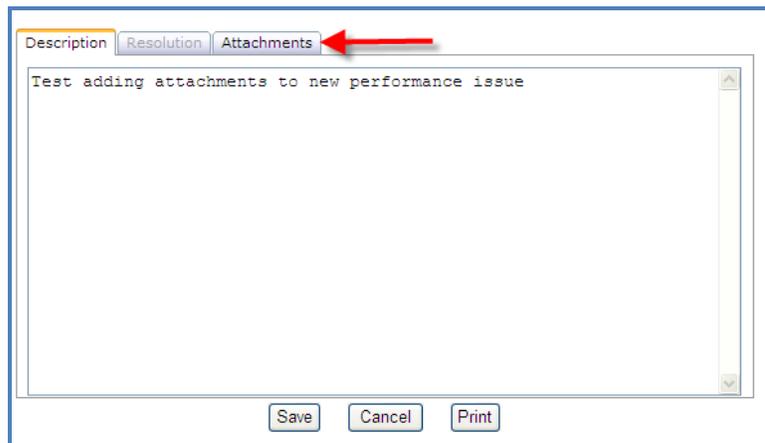
User	PI Creator	PI Approver	Administrator	Task/Demo
	X	X	X	<p>1. Attach files to a Performance Issue</p> <ul style="list-style-type: none"> ➤ Attachments are added on an individual tab on the performance issue page. ➤ You may either enter the name of the file or use Browse to locate the file using Windows Explorer. Only files with .doc, .docx, .pdf, .gif, .jpg, .png, or .bmp file extensions may be uploaded. ➤ If you attempt to upload a file with the same name as a file that already exists, an error message displays with the instruction that the file needs renamed or to delete the duplicate that already exists.
	X	X	X	<p>2. Remove file attachments</p> <ul style="list-style-type: none"> ➤ If an attachment no longer is needed, it may be deleted. ➤ If your role allows the ability to edit the performance issue, you may also delete file attachments. ➤ If an updated version of an existing file needs to be attached, the existing file should be deleted, and the new version of the file should be uploaded.
	X	X	X	<p>3. Open file attachments</p> <ul style="list-style-type: none"> ➤ On the attachment tab within performance issue page, the file name displays as a hyperlink. Selecting the link will allow the option to either open or save the file. ➤ If you choose open, CRPS starts the appropriate software to display the file. ➤ If you choose save, CRPS prompts you to identify the location to be saved.

Demonstration 1: Attach Files to a Performance Issue

1. Navigate to the performance issue to which you would like to attach the file(s). This could either be a new or an existing performance issue.

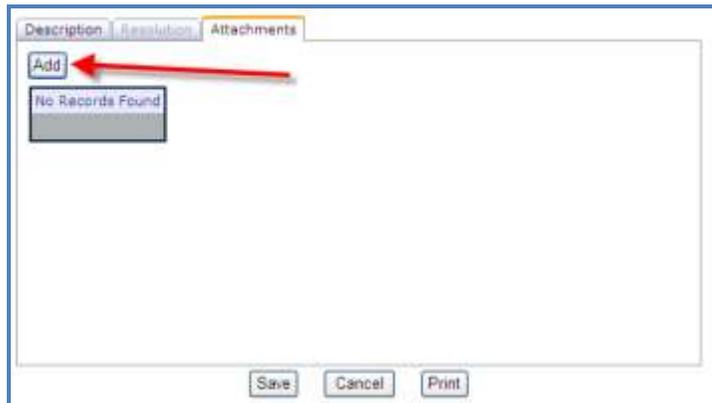
	<p>For a PI Creator to add attachments to a new performance issue, <u>the performance issue must first be saved</u>. This creates the Issue ID and then allows the user to add attachments.</p>
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2. Select the **Attachments** tab.

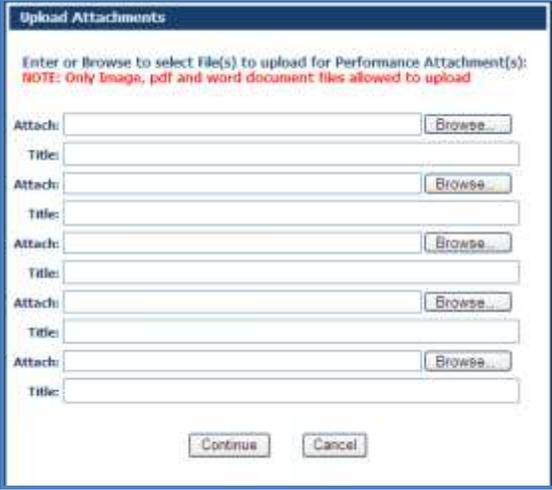


	<p>The ability to add attachments depends on your role in the system and the status of the performance issue.</p> <p>For users with the PI Creator role:</p> <ul style="list-style-type: none"> • Add and delete attachments to new performance issues after the performance issue has been saved. • Add and delete attachments to performance issues with a status of <i>pending</i>. • View attachments for performance issues for any agency with a status of <i>approved</i> or <i>resolved</i>. <p>For users with the PI Approver role:</p> <ul style="list-style-type: none"> • Add and delete attachments to performance issues with a status of <i>approved</i> or <i>resolved</i> regardless of agency. <p>For users with the User role:</p> <ul style="list-style-type: none"> • View attachments for performance issues for any agency with a status of <i>approved</i> or <i>resolved</i>.
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3. Select the **Add** button.



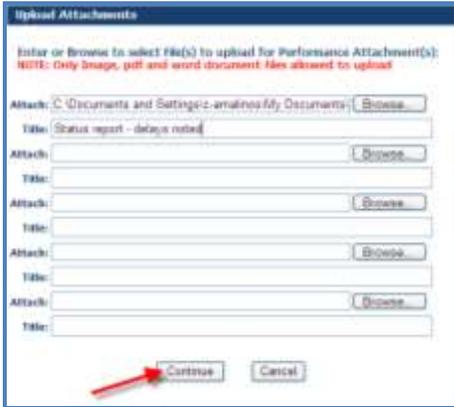
4. Enter the name of the file to be uploaded in the **Attach** field or select the **Browse** button to use Windows Explorer to locate the document.




You may attach up to 5 files at a time.

The CRPS only allows Word documents, pdf documents and image files to be uploaded. If an attempt is made to upload a file with a file extension other than .doc, .docx, .pdf, .png, .gif, .jpg, or .bmp, the window refreshes, and all entered information is lost.

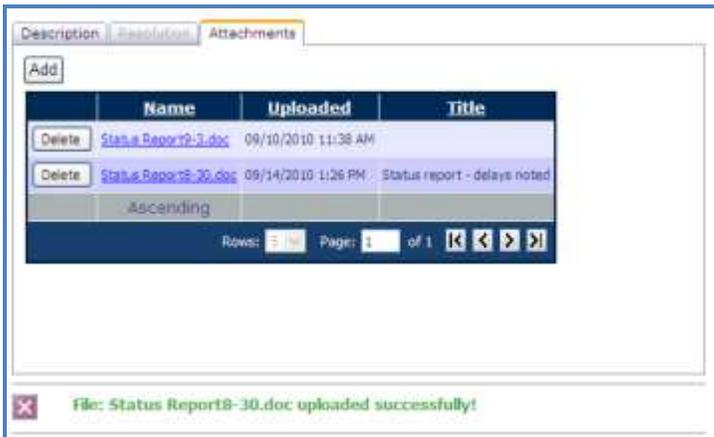
5. Enter a **Title** for the document, if desired (but not required), and select the **Continue** button.





If an attempt is made to upload a document that already exists, an error message is displayed indicating the file name is a duplicate of one that already exists. You will need to either rename the file to be uploaded, or delete the existing file before attempting to upload the new one.

The file now displays on the **Attachments** tab, and a confirmation message displays that the file uploaded successfully. The **Name** of the file is a hyperlink and should be used to [open the file attachment](#).



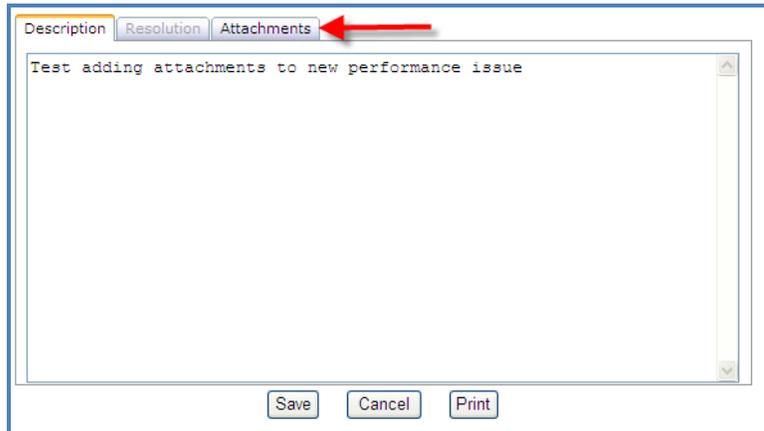
	Name	Uploaded	Title
Delete	Status Report9-1.doc	09/10/2010 11:38 AM	
Delete	Status Report8-30.doc	09/14/2010 1:26 PM	Status report - delays noted

Rows: 2 of 2 Page: 1 of 1

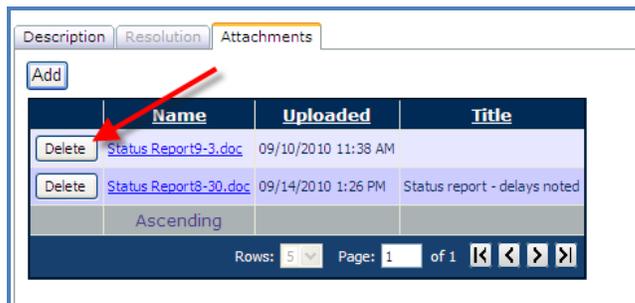
File: Status Report8-30.doc uploaded successfully!

Demonstration 2: Remove File Attachments

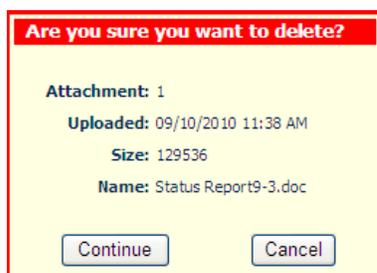
1. Locate the performance issue to which you would like to remove the attached file(s).
2. Select the **Attachments** tab.



3. Select the **Delete** button.

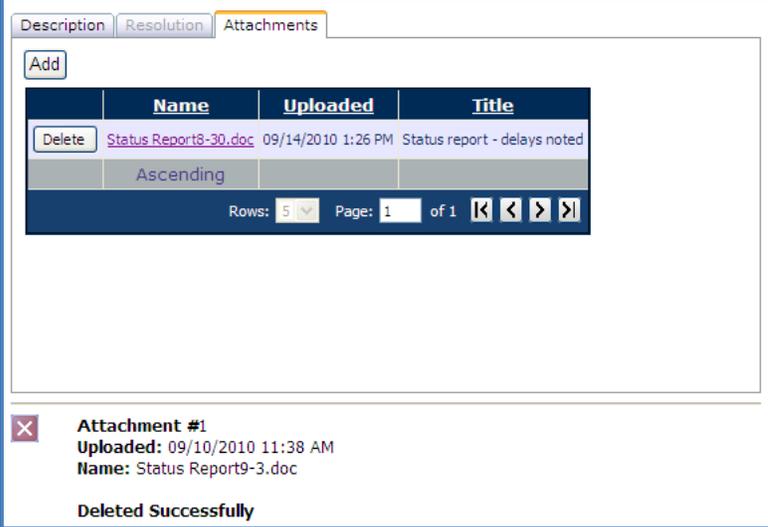


4. Select the **Continue** button.



If it is necessary to replace a file that was previously attached, you will need to delete the original file, and upload the new version of the file.

A message displays confirming that the attachment has been deleted successfully.



The screenshot shows a web application interface with three tabs: 'Description', 'Resolution', and 'Attachments'. The 'Attachments' tab is active. Below the tabs is an 'Add' button. A table displays a list of attachments with columns for 'Name', 'Uploaded', and 'Title'. A 'Delete' button is visible next to the first row. Below the table, there is a 'Rows: 5' dropdown, 'Page: 1 of 1', and navigation icons. At the bottom, a confirmation message is displayed with a red 'X' icon, stating 'Attachment #1', 'Uploaded: 09/10/2010 11:38 AM', 'Name: Status Report9-3.doc', and 'Deleted Successfully'.

	Name	Uploaded	Title
Delete	Status Report8-30.doc	09/14/2010 1:26 PM	Status report - delays noted

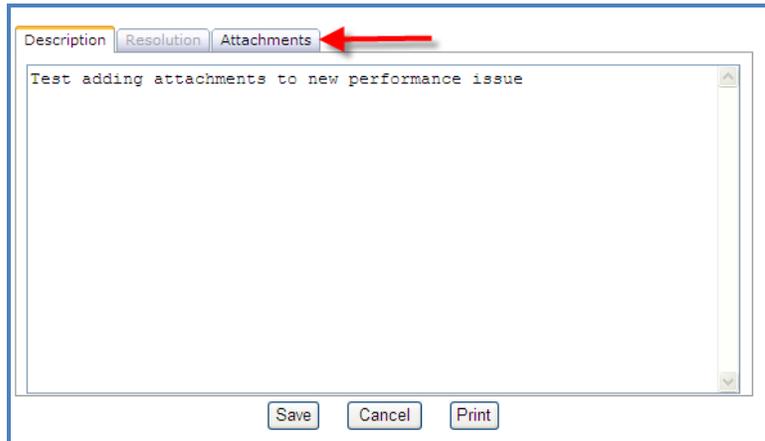
Ascending

Rows: 5 Page: 1 of 1

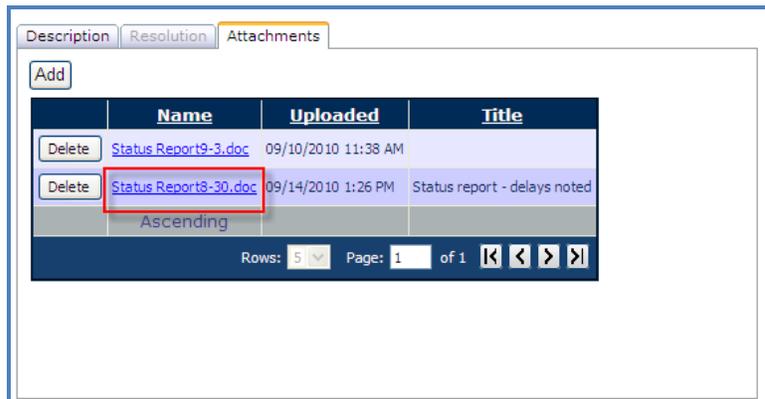
Attachment #1
Uploaded: 09/10/2010 11:38 AM
Name: Status Report9-3.doc
Deleted Successfully

Demonstration 3: Open File Attachments

1. Locate the performance issue to which you would like to open the attached file(s).
2. Select the **Attachments** tab.



3. Select the **Name** of the file, which is also a hyperlink.



4. Select the **Open** button to view the file, or **Save** to save the file to your computer.



If you chose **open**, the appropriate application is started and the file is displayed.

If you chose **save**, the Windows Explorer window displays so that you can name the file and save it to the appropriate folder.

