Welcome to the Contractor Performance Assessment Reporting System, or CPARS, Dashboard Contract Based Status Report Tutorial. During this tutorial you will learn how to run the Dashboard to monitor the status of contracts. This tutorial is designed for all CPARS access levels.

The Contract Based Status option on the Dashboard is an excellent way to develop metrics to help monitor the status of contracts, and is an important tool to assist users in the CPARS workflow. The Contract Based Status Report also allows users to see which contracts are due for an evaluation. Another feature of the Contract Based Status option is being able to see users assigned to a contract. Users have the option to see the report displayed as a bar chart, counts matrix, or in list format.

Let’s take a look at the differences of the report for the different user roles.

For Department Point of Contacts (DPOCs) the Contract Based Status Report will display all contract records except archived, that have been registered for the entire agency. For example, a DPOC for the Veterans Administration (VA) will see all the VA contracts. For Agency Point of Contacts (APOCs) the Contract Based Status Report will display all contract records except archived, that have been registered for the organization(s) to which the APOC is assigned. For example, an APOC that has access to the VA SAO Central HQ organization will only see VA SAO Central HQ contracts. For Focal Points and Alternate Focal Points the Contract Based Status Report will display all contract records except archived, that have been registered for the contract(s) to which the Focal Point is responsible. For all remaining roles, the Contract Based Status Report will display all contract records except archived, to which the user is assigned access.

The Contract Based Status option function the same way for all access levels. Slight variations occur at different access levels and are described as applicable. For purposes of demonstration, we’ll log in as the Assessing Official and run the report.

At the Home screen, we will click on Dashboard.

It is important to note that the examples in this demo are fictitious and do not represent an actual Organization or Agency.

Next, we are presented with the Dashboard. The Dashboard defaults to Evaluations/Contract Based Status Report. We will select Status under Contract Based Reports. Let’s look at the information displayed. As we can see we have 3 contracts that are current and do not require an evaluation at this time. This represents 10% of this AO’s contracts. 6 contracts are due for an evaluation. This represents 20% of this AO’s contracts. 18 contracts are overdue for an evaluation. This represents 60% of this AO’s contracts. 3 contracts are final and no more evaluations are required. This represents 10% of this AO’s contracts. This AO has a total of 30 contracts that have been registered.

Now, let’s take a look at the options available to us to sort and limit the data. We can see that we have that ability to group the results by All or Contract Activity. Focal Points also have the ability to group by Organization and Assessing Official. APOCs and DPOCs also have the ability to group by Organization and Focal Point.

It is important to note that the report defaults to Include All mode which only displays contracts to which we have been assigned access. If we do not have access to a particular contract, it will not be included in the report. If we do not wish to use Include All mode, we can choose which types of contracts we wish to include on the report by making selections under the Filter By Options section of the screen. The Filter By options allow us to choose to limit our report based on a specific Business Sector or Contract status. We also have the ability to further filter the Data by selecting an available option from the Additional Filters drop-down and entering the corresponding data into the box below and clicking Apply. Additional filters include options such as Contract Number, Contract Activity, and Vendor Name. Different additional filters are available depending on the access level logged in.

Let’s say that we want to see the total number of contracts Due and Overdue for the Nonsystems Business Sector. To do this we will select Nonsystems from the Business Sector drop-down and click the Due and Overdue options under Contract Status. Multiple elements can be selected by holding the CTRL key and clicking each element to be included. To select multiple elements that are adjacent, click on the first element, hold the SHIFT key, and then click on the last element to be included.

We can see that the count matrix has updated and now shows only Due and Overdue contracts for the Nonsystems business sector. For the Nonsystems Business Sector, 3 contracts are due for an evaluation. This represents 27% of this AO’s contracts. 8 contracts are overdue for an evaluation. This represents 73% of this AO’s contracts. If we want to see the counts matrix displayed in a graphical Bar Chart format, we click on Bar Chart under Report Format. As we can see the selections we made to limit the report, have transferred over to the Bar Chart Report Format. Each color options represents a level of status as defined at the bottom of the screen.

Now, let’s say, we want to see the individual contracts that make up these counts. We will click on List under Report Format. Again, we can see that the selections we made to limit the report, have transferred over to the List Report Format. Its important to note that if we had select a Group By option, that selection would not have transferred over to the List Report Format.

We will also notice that we also now have the option to Include Assigned Users. This is used when we want to see who has access to a contract. The List automatically defaults to include no assigned users. If we click the drop-down, we can see that we can choose to see None, All, All Focal Points, All Workflow Users, Focal Point(s), Alternate Focal Point(s), Assessing Official Rep(s), Assessing Official(s), Contractor Rep(s), and Reviewing Official(s). Selecting a user role or group from the list, will provide a list of all the users and their associated roles, email addresses, and last login date. The All option will list all user roles assigned to the contract. The All Focal Point(s) option will list the Focal Point and Alternate Focal Point(s) assigned to the contract. The All Workflow Users option will list the Assessing Official Rep(s), Assessing Official(s), Contractor Rep(s), and Reviewing Official(s) assigned to the contract. It is important to note, Contractor Rep and Senior Contractor Rep users will only be able to select None, All, All Focal Points, Focal Point(s), Alternate Focal Point(s) and Contractor Rep(s). The All will list Focal Point(s), Alternate Focal Points and Contractor Rep(s).

For purposes of demonstration, lets select All Workflow Users.

Let’s take a look at a few of the columns of information displayed.

It’s important to Note, that if we were logged in as the Focal Point, a Delete column would display. The Focal Point has the ability to delete any contracts that are at the Registered status.

First, we have the Contract Number and Order Number columns. If we click on one of the contract numbers in this column, it will open the contract information. When we have finished viewing the contract information, we will click the Close button. Once we have viewed a particular contract, a green X will be placed in the Viewed column to indicate that we have already viewed that contract. Let’s move on to the Contract Status column. This column indicates whether the contract is Current, Due, Overdue, or Final. Each level of status is defined at the bottom of the screen. For instance, a contract with a status of Due means that the latest evaluation for this contract should be in process at this time. A contract with a status of Overdue means that the latest evaluation for this contract has not been completed within the 120 day timeframe. Next, we have the Contract Due Date column. This column shows the date each contract is due for its next evaluation. The Contract Due Date is automatically calculated by the system. Suppose we want to sort our List by Contract Due Date. We can do this quickly, by simply clicking on the Contract Due Date column heading in order to sort the Due Date in Ascending or Descending order. In fact, we can click on the majority of the column headings in the report to sort by that particular column. Finally, if we scroll all the way over to the right, we will see the Users column. Here, we can see the users assigned to the contract. The users are displayed in one row for that contract number. In this case since we selected All Workflow Users, we see any and all Contractor Reps, Assessing Official Reps, Assessing Officials, and Reviewing Officials displayed for each contract, to include their User Role, Name, Email Address, Phone Number, and Last Login Date.

Let’s take a look at the remaining Dashboard Options. First, we can download any of our reports into a Spreadsheet. When we click the Spreadsheet function, our Status Report will be displayed as a spreadsheet.

If we want to save this report or any other reports, to run again in the future, we enter a report name in the Report Name block and click the Save icon. The Dashboard screen will refresh and a Select Saved Report drop-down will appear. To run the saved report in the future, we would select the report name from the drop-down and click Run Report. To delete a saved report, select the Report Name from the drop-down and click the Delete button.

Since we are done running our Dashboard Contract Based Status report, we are ready to exit CPARS by clicking Log Out.

This concludes the CPARS Dashboard Contract Based Status Tutorial. Congratulations on completing the tutorial and thank you for participating!