Welcome to the Contractor Performance Assessment Reporting System, or CPARS, Report Scheduler Tutorial. During this tutorial you will learn how to use the Report Scheduler to automatically run and send specific CPARS reports via email as file attachments. This tutorial is designed for the Department Point of Contact (DPOC) and Agency Point of Contact (APOC) access levels.

The Report Scheduler is an excellent way to monitor the status of evaluations and contracts and is an important tool to substitute the need for an Application Programming Interface (API).

The Report Scheduler allows DPOCs and APOCs to have reports be automatically run and sent to their email inbox as file attachments. Currently, available reports are the Evaluations/Contract Status Report, Evaluation Metrics Report, and Processing Times Report.

The Report Scheduler functions the same way for all access levels. For purposes of demonstration, we’ll log in as the DPOC.

At the Home screen, we will click on Report Scheduler.

Next, we are presented with the Report Scheduler Parameters screen. This screen enables us to choose which reports we wish to receive automatically and how often.

We first have to choose which type of report we would like to have sent to us. Our Report Type options are: Evaluations/Contract Status Report and Metrics.

Let’s leave the default of Evaluations/Contract Status Report selected under Report Type. Next, we have to enter a Job Name. This is the name of our automatic report. We will enter Weekly Status in the Job Name field.

Next, we have our Metrics Options. These will change depending on the Report Type selected above. Since we selected a Report Type of Evaluations/Contract Status Report our only option is to select a saved report. In order to automatically send an Evaluations/Contract Status Report we must have a saved report. If we do not have a saved Evaluations/Contract Status Report we will need to click on Evaluations/Contract Status report, select our parameters and save the report. For more information on how to run and save an Evaluations/Contract Status Report, please see the Evaluations/Contract Status Report Tutorial located in the Learning Center on [www.cpars.gov](http://www.cpars.gov). We will select our saved report from the Select Saved Report drop-down.

Next, we must decide what Export File Type we want to receive. Our choices are Excel, which will provide us an Excel Spreadsheet with our desired results, machine-readable Extensible Markup Language (.XML), or JS Notation (.json), which both are plain text files that are compatible with many different software applications. We will select Excel from the Export File Type drop-down.

Next, we have the Scheduling options. Here we must decide how often we want to receive our report. Our options are Daily, Weekly, Biweekly, Monthly, Quarterly, Semiannually, or Annually. We will select Weekly from the Frequency drop-down. Next, we must indicate the date we want this report to start running. We can either type the date in manually or use the calendar feature to select a date. We will enter our date in the Initial Run Date field. We also have the ability to have the system send a copy of our report to another email address. We will enter the email address in the CC Email address box. If we choose to send a copy of the report to another email address, we must read the statement to certify that the email address we are copying has a valid need to know. We will check the box to certify the email has a valid need to know. Finally, we will click the Save & Run button.

The system will send us our report on the date we entered in the Initial Run Date field and send them weekly from that point forward.

Now, let’s set one of the other available reports to automatically run. We will go back up to the Report Type drop-down and select Metrics. Just as we just did before, we need to name our report. We will enter Monthly Metrics in the Job Name field.

Next, we have our Report Options. Since we selected a Report Type of Metrics we have the ability to choose Evaluation Metrics and/or the Processing Times Report. We will select both the Evaluation Metrics and Processing Times Reports. When we select the Processing Times Report, we want to verify the Period of Data we need. Our options are Weekly, Monthly, Quarterly, and Annually. We will select Monthly from the drop-down.

Next, we will select Monthly for the Frequency, enter our Initial Run Date, and select Save & Run.

Now, let’s take a look at how to stop a report from running. Let’s say we need to stop the Evaluations/Contract Status Report from running. We will go back up to the Report Type drop-down and select Evaluations/Contract Status Report from the drop-down. We will then select the Job name from the Saved Job drop-down. To stop this job we go down to the Scheduling section and select No under the Is the Report Active drop-down. Then click Save and Run. This will stop the report from running.

Now, let’s say we need to change the Metrics report to stop including the Processing Times Report. We will select Metrics from the Report Type drop-down. Select the Monthly Metrics job from the Saved Job drop-down. We will unselect the Processing Times Report then click Save & Run. If we needed to delete the Monthly Metrics job, we would click the Delete Job button.

It’s important to note, we can have as many saved and active reports as we want.

Since we are done scheduling our Reports, we are ready to exit CPARS by clicking Log Out.

This concludes the CPARS Report Scheduler Tutorial. Congratulations on completing the tutorial and thank you for participating!