

Chapter 8

SPS REPORTS

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8-1 REPORTING REQUIREMENTS	

8-1 Reports

CACI has integrated third party tools, Cognos’s Impromptu® as the PD² ad-hoc reporting module. Licenses for Cognos have been integrated with PD² software. These tools will empower users to develop queries and reports without learning the complex database syntax and schemes; thus effectively insulating users from the complexity of the database, the data dictionary and table joins.

The Reports feature allows you to define security access rights to reports as well as add or delete the reports available to users. As new reports are created within PD², only the creator has default access. Report access must therefore be granted at the group level through the Reports Task. Users in PD² must then be granted access to either write or read (run) the reports.

Careful consideration must be given when granting read/write access to various PD² and Cognos reports. Points to consider when establishing reporting rights include:

- Users may be designated as either readers or writers.
- A reader can only run existing reports to which his/her group has access.
- Any user in a group with rights to any of the existing reports can at least view the report.
- A writer can create a new report, import a previously created report, and delete a report he/she has created.

- Reports executed in Impromptu will only return the data the person running the report has rights to view in PD² (i.e., if a person can only access their team's folder in PD², the report will only show the same data – not any other team data). In addition, results from workload related reports are limited to the “assigned users” in the Mgmt tab of the user running the report. Personnel responsible for running office level reports would need to have all users listed in “assigned users”. Personnel not listed as such will not show up on the workload report. Access security is maintained through System Administration report access and user group access. Users can be assigned rights to read (run) or create new reports, to be stored in the database for security and sharing purposes.

8-2 External Reporting

In addition to Cognos reports, you may be responsible for tracking additional information for daily, monthly, and year-end reporting.

A variety of external reports are available through the EZ-Query, CBIS and FPDS-NG systems. Report users should refer to each of these systems for detailed instructions.

All three of these systems have pre-written reports that can be tailored by responding to one or more prompts.

Additionally, both CBIS and FPDS-NG have ad-hoc capability which allows the user to create their own reports.

8-3 Fiscal Year-end Reporting

In conjunction with performing your normal monthly reporting procedures, you may need to perform additional year-end activities. Prior to midnight September 30, run the appropriate report to determine if all necessary PR's have been awarded and their subsequent awards released.

As workload increases during end of fiscal year preparation, it is imperative you **release** all contract actions with expiring funds prior to 1 October. See [Chapter 2--SPS - Fiscal Year End Processing](#), for additional guidance that should be useful at year-end.

EZQUERY can also be used to run fiscal year end reports.

8-4 Centralized Report Generation

The DM IPT will maintain all standard reports and update them as warranted by the user community. Access to certain reports may be limited, as importing and executing the reports is a function of PD² system security as defined by the site. System administrators should oversee the importing of standard and ad hoc reports. When seeking specific reports, sites should first examine those reports provided on the Contracting systems web-site, and if no available reports meet specific requirements, contact their FRB POC

to request a customized report. Reports will be developed for Air Force users on an as-needed basis. Reports will be made available for download with explicit instructions on the Contracting Systems website (HIBB) (<https://afcis.gunter.af.mil>) Report Repository.

8-5 Importing Downloaded Reports into PD²

Once Air Force standard reports have been downloaded from the Contracting Systems/HIBB website, they can be imported into PD² and run as any other PD² standard report. To import downloaded reports into PD²:

1. From the PD² Desktop, highlight the Procurement Menu and select Reports
2. Select Import
3. Locate the file directory containing your downloaded reports and highlight the desired report for import
4. Click Open
5. When asked “Would you like to save this report?” click Yes
6. Select a Report Group from the drop-down list or type in a new Report Group
7. Assign a unique name to the report
8. Click OK
9. Upon receiving the message “Report successfully imported”, click OK
10. To grant report access to multiple users, highlight the Utilities Menu and select System Administration
11. Open the Reports Task, highlight the imported report, and click Update
12. Assign group access to the report as appropriate and select the Clear User Name button

8-6 Running Reports

Refer to your PD² Advisor under “How Do I”, “Use PD² Reporting functions” for detailed instruction on running reports.

8-7 Recommended COGNOS Report formats for Internal and External Customers

HTML – Web page or local network shared drive.

PDF – Can be non-editable

Spreadsheet – Save as excel with format. (E-mail or network drive)

Refer to COGNOS help file for further details