

# ADMINISTRATIVE PROCEDURES



Procedure Number: 22-52

Effective Date: 07/15/2008

Revision Date: \_\_\_\_\_

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County Administrator

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**SUBJECT: REPORT CREATION, SUBMISSION, AND VERIFICATION FOR rePORTAL**

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**DEPARTMENT RESPONSIBLE: All County Departments**

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## I. STATEMENT

The Pima County rePORTAL website is a reporting portal used to view shared reports created using the Crystal Reports™ software. Most of the reports use data from the Pima County Synergen system. Pima County employees will be able to view all Synergen reports that are posted.

The following procedure outlines the method by which a department can add a report to, remove a report from, or modify a report on the Pima County rePORTAL website.

## II. PROCEDURE

### A. General Information

1. The link for the Pima County rePORTAL website is <http://spreportal.central.pima.gov/reports.aspx>.
2. Reports with individual employee data and other sensitive and/or restricted information shall not be added to the rePORTAL website. Determination of data sensitivity can be made by the department authorized signer, the Information Technology Department, and/or the Department of Finance and Risk Management.

### B. Report Creation

1. Departments are responsible for developing and/or modifying their own reports following the guidelines provided by the Information Technology Department. These guidelines are on the rePORTAL website in the Public Folders/Procedure folder. If a department does not have staff skilled in report creation, the Information

Technology Department shall make every effort to service any report creation request.

2. The requested report shall meet all required technical and formatting standards as identified by the Information Technology Department. Any changes to the reporting standards shall be made by the Information Technology Department. All training regarding creating or modifying existing reports is each department's responsibility.
3. The program for creating reports to post on the rePORTAL website is Crystal Reports™ from Business Objects. There are no restrictions on the version number.

C. Report Submission

1. Requests for posting new reports, deleting existing reports, or modifying existing reports, shall be submitted electronically using the rePORTAL Report Request form. This electronic form is located on the rePORTAL website in the Public Folders/Procedures folder.
2. The completed rePORTAL Report Request form shall be printed, signed by an authorized department signer, scanned, and e-mailed. The report file (.rpt) shall also be attached to the e-mail.
3. Refer to the instructions on the rePORTAL website; *Instructions – rePORTAL Report Request* and *Instructions – Report Layout Requirements*.

D. Report Verification

1. During testing by the Information Technology Department and/or Department of Finance and Risk Management, the report's data source is to be the production instance.
2. The Information Technology Department shall verify that the report meets all required technical and formatting standards within five business days after receipt of the rePORTAL Report Request form.
3. If, after review by the Information Technology Department, a report is found to include financial information, the e-mail with the rePORTAL Report Request form and .rpt file shall be forwarded to the Financial Systems Division of the Department of Finance and Risk Management.
4. The Financial Systems Division shall have five business days to ensure the accuracy of the data and return the rePORTAL Report Request form and report to the Information Technology Department.

In the event that multiple reports are submitted at the same time, the Financial Systems Division reserves the right to set a review schedule that may exceed five days. This schedule will be determined in conjunction with the Information Technology Department.

5. If the data is accurate, the rePORTAL Report Request form shall be approved by the Department of Finance and Risk Management.
6. If the report meets all formatting standards and if the data is accurate, it shall be posted to the rePORTAL website.
7. If the data is inaccurate and/or if the report does not meet all formatting standards, the rePORTAL Report Request form shall be rejected and returned to the requestor with an explanation for the reason for rejection.
8. If the rePORTAL Report Request form is rejected, the department shall modify the report based upon the reason for rejection and resubmit the report using a new rePORTAL Report Request form.