# Quick Reference Guide for Report Writing

## Standard Reports

The standard report writer generates predefined reports that group contracts by selected criteria. These reports include hyperlinks to the contract files.

Standard reports group contracts by the following categories:

- General
- Other Parties
- Status
- Parties
- Contract Event Date
- Additional

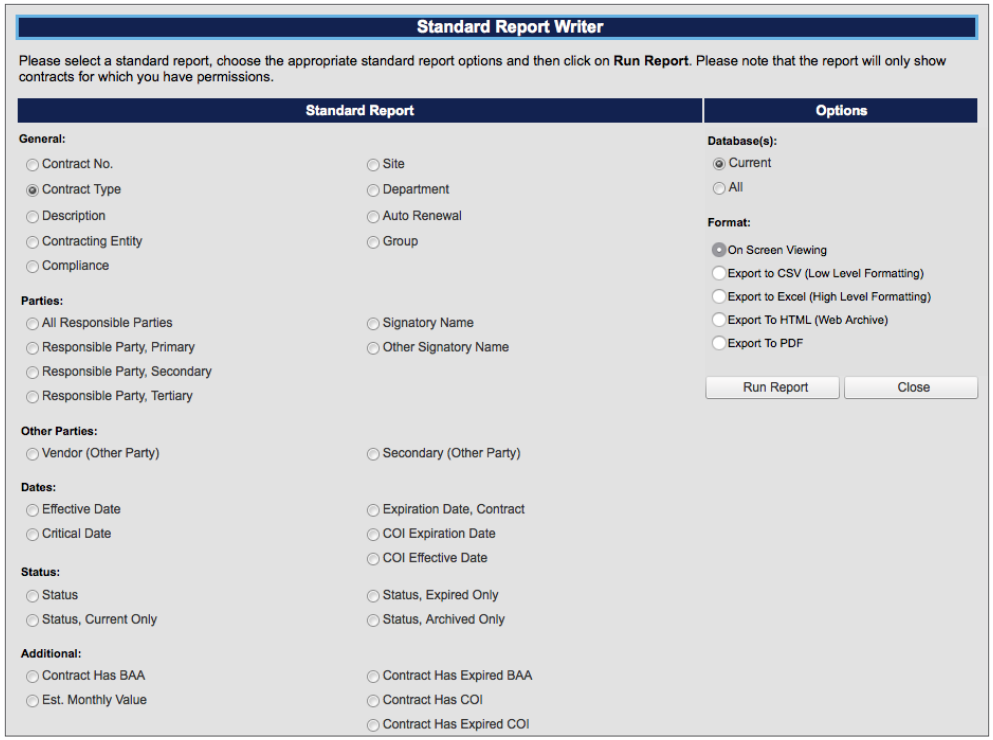
Standard reports on general categories, parties and other parties contain the following information:

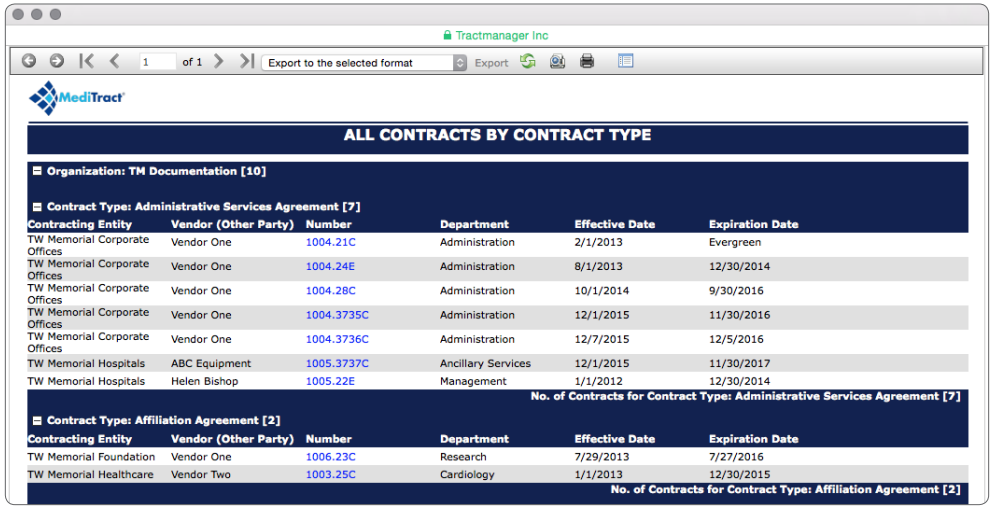
- Contracting Entity
- Contract Number
- Effective Date
- Expiration Date (except in COI or BAA reports)
- Contract Type (except in compliance reports)
- Subject (in critical date reports only)
- Vendor
- Department

### To run a standard report:

- Under Report Writer in the navigation pane, select Standard Reports.
- Select the category by which the report should group contracts.
- Under Options, select whether to include the current database or all databases.
  *Only umbrella users can select all databases.*
- Select the report format:
  - On Screen Viewing*
  - Export to Excel
  - Export to PDF
  - Export to CSV
  - Export to HTML

  **On Screen Viewing generates an exportable report that functions identically to reports generated by the View All feature.*
- Click the Run Report button.

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## Custom Reports

The custom report writer allows you to run customized reports that can be shared with other users.

### To build a custom report:

- Under Report Writer in the navigation pane, select Custom Reports.
- Select fields for the report:
  - Select the available fields you wish to include in the report.
  - To move available fields to the Selected Fields list, double-click the selected fields or click the Add button.
  - To remove fields from the Selected Fields list, double-click them, or select them and click the Remove button.
- Click the Next button.

### Quick Tip

To include hyperlinks to contracts in the report, add the Contract Number field.

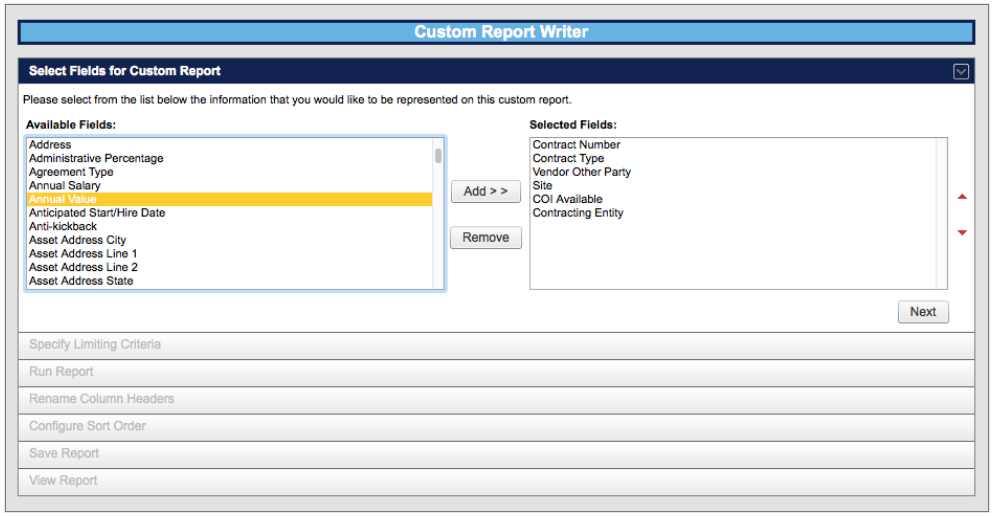
- Specify limiting criteria:
  - Select the limiting criteria, user instruction and limiting value from the dropdown menus.
  - Click the Add Criteria button.
  - Repeat as needed.
- Click the Next button.

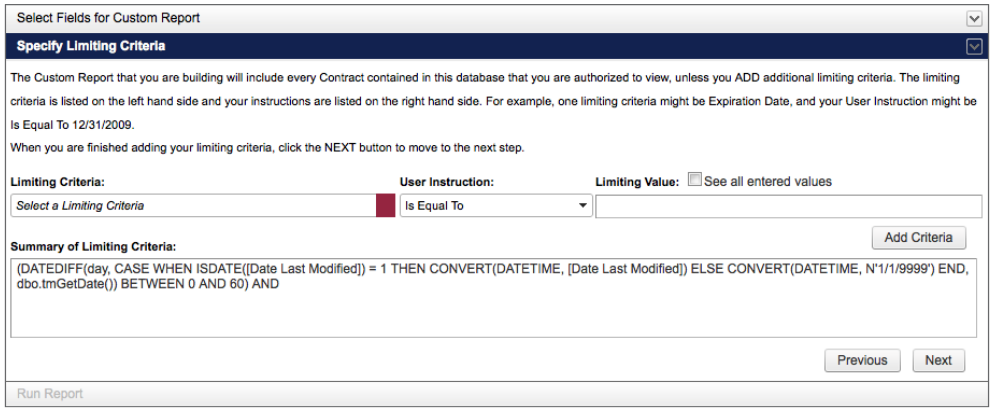
### Quick Tips

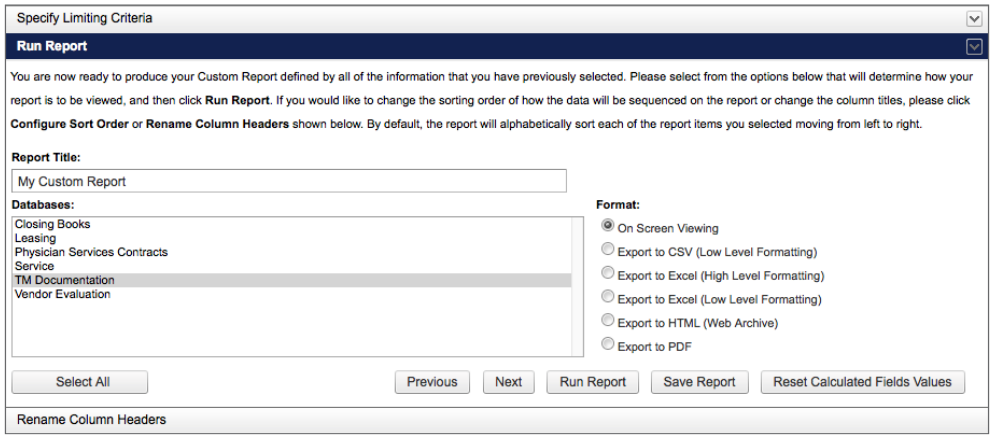
- To filter limiting criteria, start typing in the limiting criteria field.
- The user instructions pertaining to dates (Within Next 30 Days, etc.) can only be applied to limiting criteria that are measurable by date (Critical Date, Contract Effective Date, etc.).

### To prepare to run the report:

- OPTIONAL: Edit the report title.
- Select the report format.
- To run the report, click the Run Report button.
  ***OR***
- To save the report, click the Save Report button.
  ***OR***
- To edit the report, click the Next button.
- OPTIONAL: To reset the values in calculated fields, click the Reset Calculated Fields Values button.
  *This only applies to databases using new custom fields.*



- OPTIONAL: Rename column headers.

◆ Click the Next button.

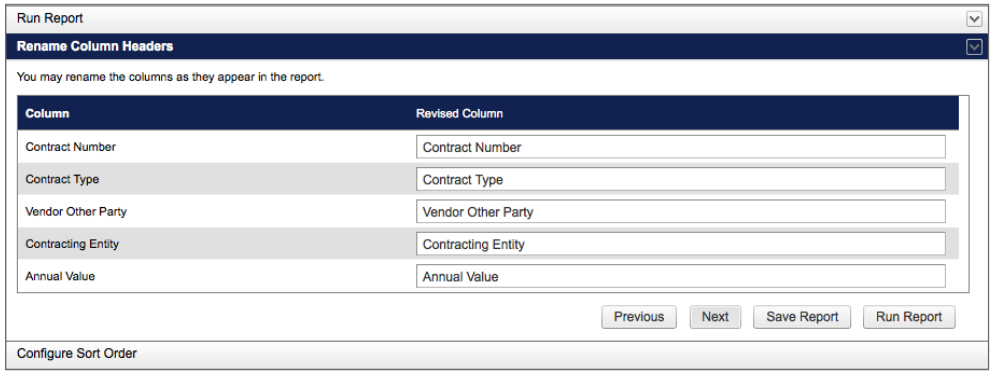
- OPTIONAL: To add a column, select from the dropdown menu and click the Add button.
- OPTIONAL: To remove a column, click the Remove hyperlink.
- OPTIONAL: To change individual column sort order, select Ascending or Descending from the dropdown menus.
- OPTIONAL: To move a column, click the ⠿ and drag the column.

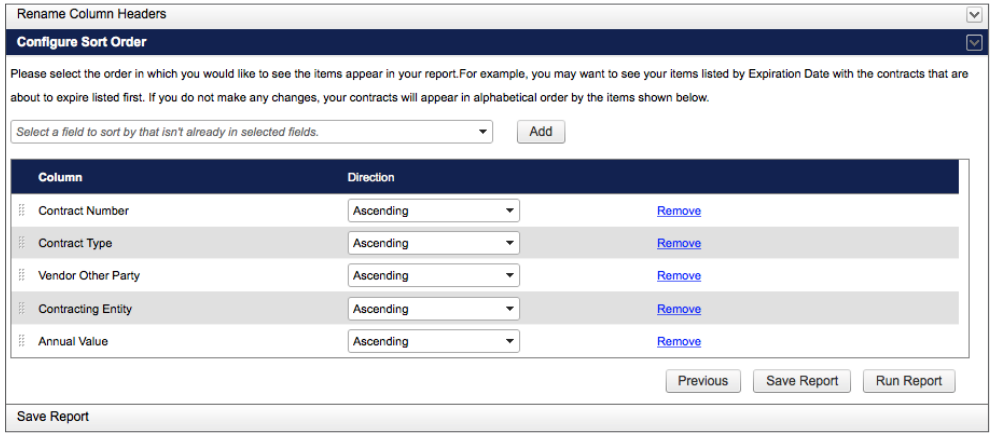
◆ To save the report, click the Save Report button.

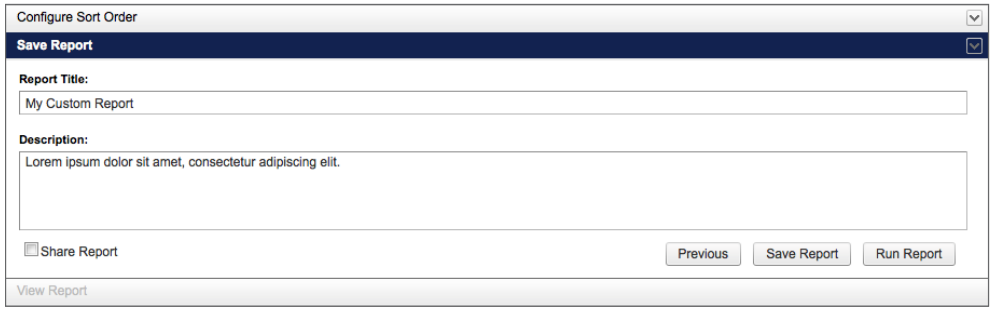
- If desired, edit the title and add a description of the report.

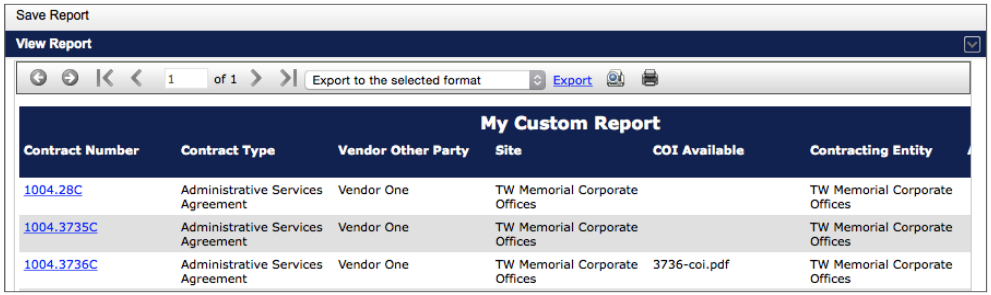
***OR***

◆ To run the report, click the Run Report button.



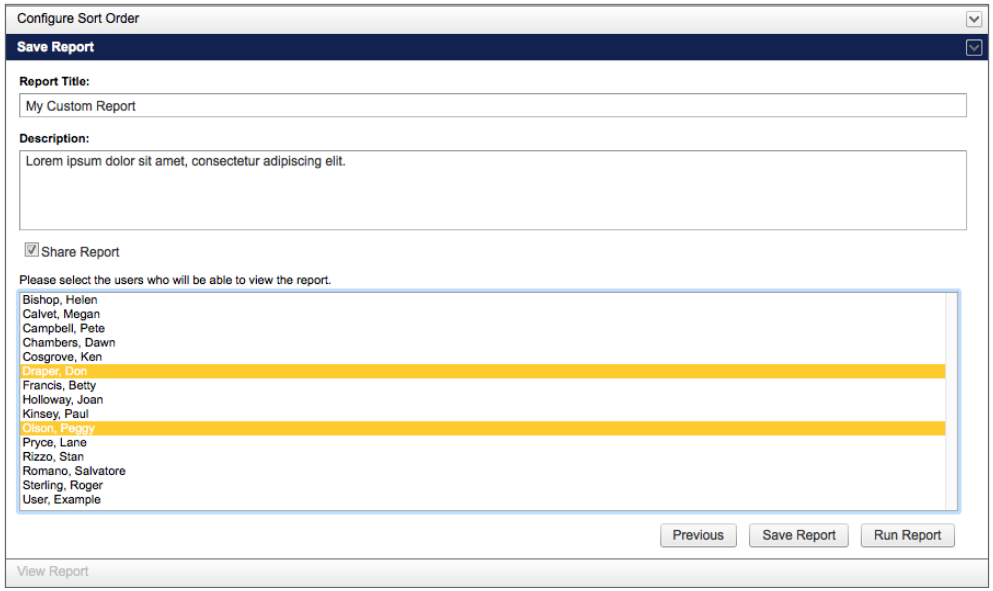



**To share a custom report:**

- Check the Share Report checkbox.
- Select the users needing access to the report.
- Click the Save Report button.
  - To cancel report sharing, uncheck the checkbox.

## Quick Tip

Users selected on the share report list will have access to the report regardless of their permissions.



## Open Saved Report

This section houses saved custom reports.

### To run a saved report:

- Under Report Writer in the navigation pane, select Open Saved Report.
- On the open custom report page, select the report format.
- Click on the report title.
  *The report will run in the selected format.*

### To schedule a saved report:

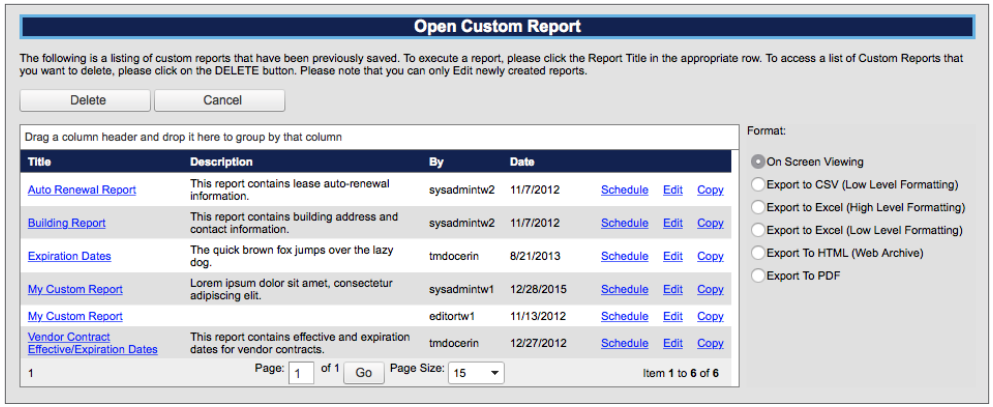
♛ *Administrator Access**

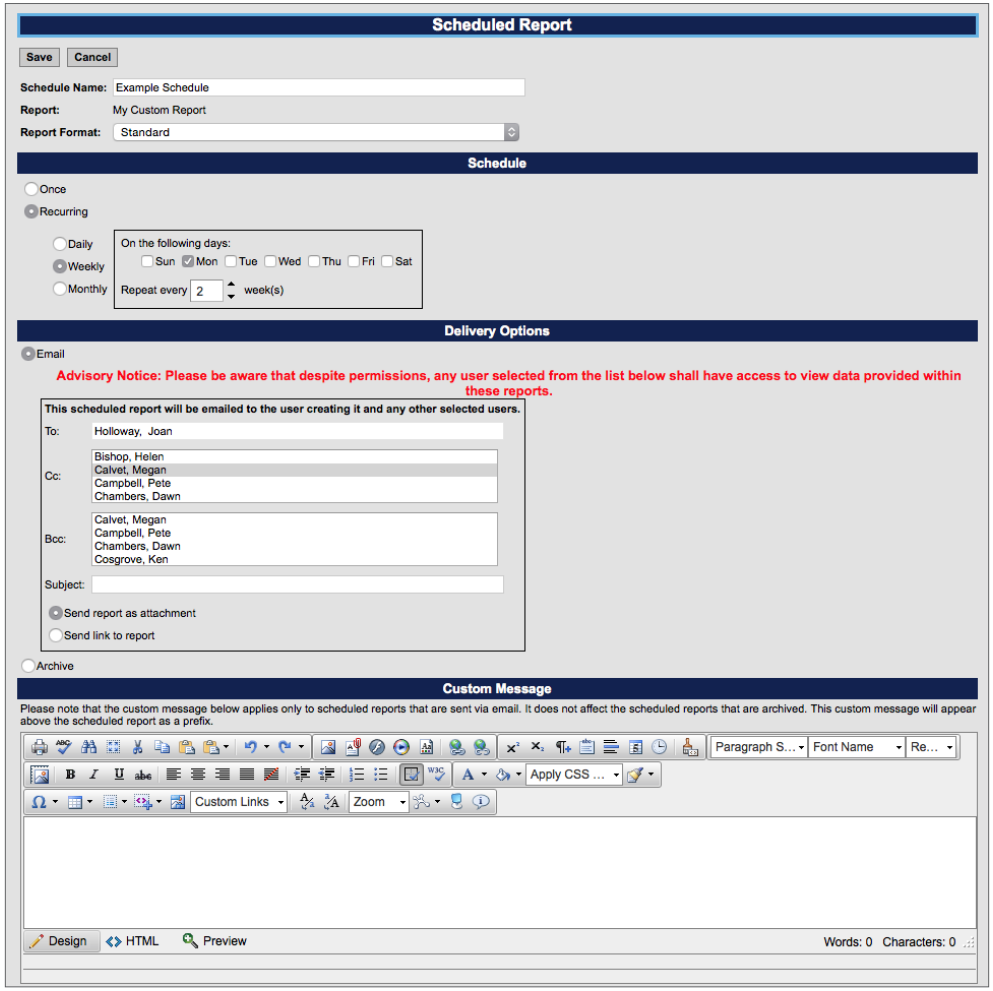
***By default, the ability to schedule reports is restricted to administrators and system administrators. To have this changed, have your system administrator contact Customer Care.**

- On the open custom report page, click the Schedule hyperlink of a report.
- Enter the schedule name.
- Select the report format.
- Select whether the schedule is once or recurring.
  - If recurring, select schedule options.
- Select delivery options:
  - For email, select recipients, enter the subject and choose whether the report is sent as an attachment or a hyperlink.
  - For archival, enter the report name and choose whether the report should be archived incrementally or overwrite the existing archive.
- Click the Save button.

### Quick Tips

- Editing a report overwrites the existing report. To edit a saved report without overwriting the existing report, copy the saved report and edit the copy.
- Users can only delete reports that they created.
- Reports created more than two years ago cannot be edited or copied.



**To edit a saved report:**

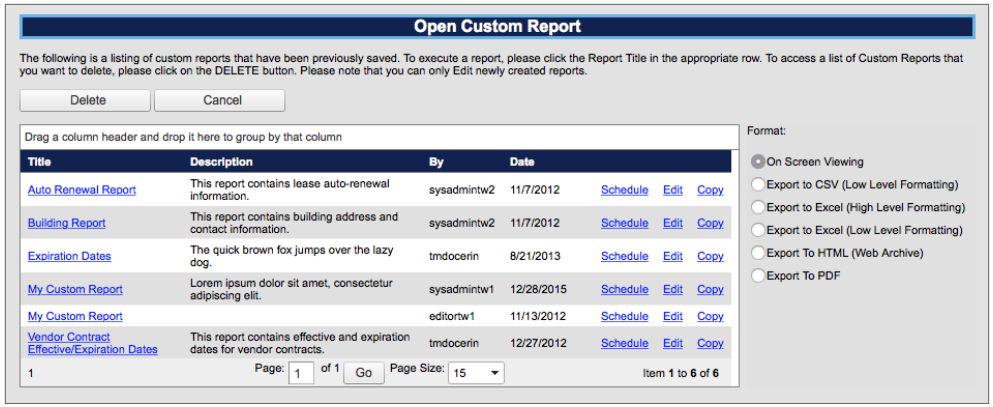
- On the open custom report page, click the Edit hyperlink of the report.
- In the custom report writer, edit as needed.
- Run or save the report.

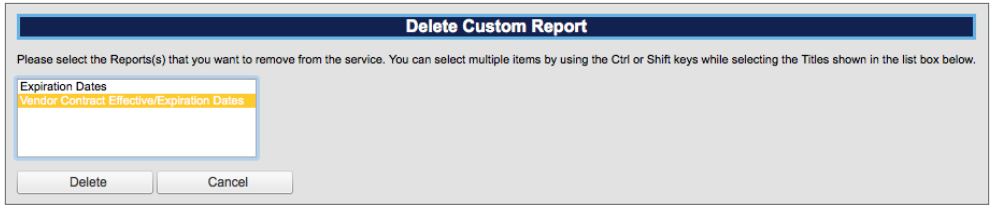
**To copy a saved report:**

- On the open custom report page, click the Copy hyperlink of report.
- In the custom report writer, edit as needed.
- Run or save the report.

**To delete a saved report:**

- On the open custom report page, click the Delete button.
- Select the report (or reports), then click the Delete button.



## Expense Reports and Revenue Reports

These report writers generate expense reports (grouped by contract type) based on estimated monthly value of active contracts.

- Expense reports show estimated monthly value for *non-revenue* contract types.
- Revenue reports show estimated monthly value for *revenue* contract types.

### Quick Tip

Financial reports only run if contracts matching the selected criteria have the Estimated Monthly Value field populated. To see contracts with no estimated monthly value, click on Status in the navigation pane, then select No Monthly Value.

### To run an expense or revenue report:

- Under Report Writer in the navigation pane, select Expense Reports or Revenue Reports.
- Under Financial Reports, select a category:
  - Contract Type
  - Responsible Party
  - Vendor (Other Party)
  - Contracting Entity
  - Department
  - Site

  *Available criteria for the selected category will autopopulate the field.*
- Select one or more criteria.
- Under Report Options, select a report layout.
  *The detail report includes hyperlinks to individual contract files.*
- Select a report format, then click the Run Report button.

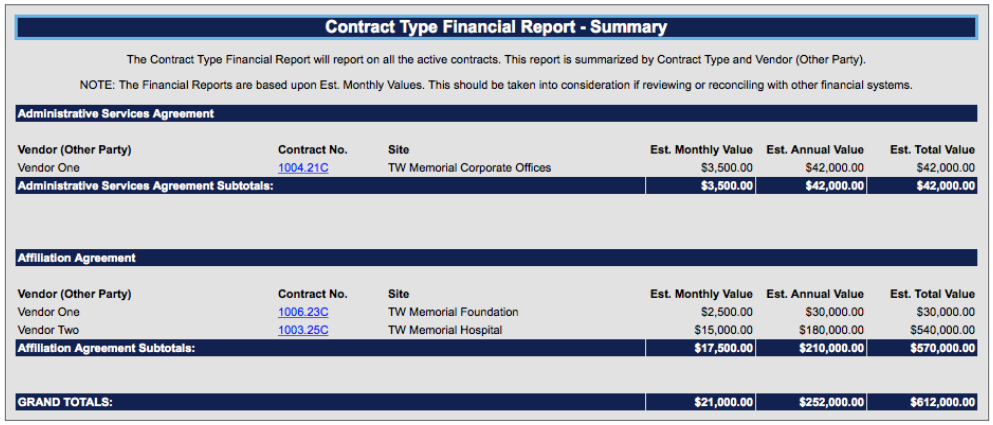
*Contract Reports*

The contract report writer generates reports on the following information for all active and expired contracts, grouped by the selected category:

- Contracting Entity and Vendor
- Contract Type and Department
- Contract Number
- Effective Date and Expiration Date

### To run a contract report:

- Under Report Writer in the navigation pane, select Expense Reports or Revenue Reports.
- Under Contract Reports, click on a category.
  *The report will open in a new window or tab.*

### Quick Tip

Contract reports include all active and expired contracts (that the user has permissions to view), regardless of contract type or estimated monthly value.