

## 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 CSV
  - ◆ Export to Excel
  - ◆ Export to PDF

*\*On Screen Viewing generates an exportable report that functions identically to reports generated by the View All feature.*

- ◆ Click the Run Report button.

**Standard Report Writer**

Please select a standard report, choose the appropriate standard report options and then click on **Run Report**. Please note that the report will only show contracts for which you have permissions.

Standard Report	Options
<b>General:</b> <input type="radio"/> Contract No. <input checked="" type="radio"/> Contract Type <input type="radio"/> Description <input type="radio"/> Contracting Entity <input type="radio"/> Compliance	<b>Database(s):</b> <input checked="" type="radio"/> Current <input type="radio"/> All  <b>Format:</b> <input checked="" type="radio"/> On Screen Viewing <input type="radio"/> Export to CSV (Low Level Formatting) <input type="radio"/> Export to Excel (High Level Formatting) <input type="radio"/> Export to HTML (Web Archive) <input type="radio"/> Export To PDF
<b>Parties:</b> <input type="radio"/> All Responsible Parties <input type="radio"/> Responsible Party, Primary <input type="radio"/> Responsible Party, Secondary <input type="radio"/> Responsible Party, Tertiary	<input type="radio"/> Site <input type="radio"/> Department <input type="radio"/> Auto Renewal <input type="radio"/> Group  <input type="radio"/> Signatory Name <input type="radio"/> Other Signatory Name
<b>Other Parties:</b> <input type="radio"/> Vendor (Other Party)	<input type="radio"/> Secondary (Other Party)
<b>Dates:</b> <input type="radio"/> Effective Date <input type="radio"/> Critical Date	<input type="radio"/> Expiration Date, Contract <input type="radio"/> COI Expiration Date <input type="radio"/> COI Effective Date
<b>Status:</b> <input type="radio"/> Status <input type="radio"/> Status, Current Only	<input type="radio"/> Status, Expired Only <input type="radio"/> Status, Archived Only
<b>Additional:</b> <input type="radio"/> Contract Has BAA <input type="radio"/> Est. Monthly Value	<input type="radio"/> Contract Has Expired BAA <input type="radio"/> Contract Has COI <input type="radio"/> Contract Has Expired COI

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Export to the selected format
Export

**ALL CONTRACTS BY CONTRACT TYPE**

Organization: TM Documentation [10]					
Contract Type: Administrative Services Agreement [7]					
Contracting Entity	Vendor (Other Party)	Number	Department	Effective Date	Expiration Date
TW Memorial Corporate Offices	Vendor One	1004.21C	Administration	2/1/2013	Evergreen
TW Memorial Corporate Offices	Vendor One	1004.24E	Administration	8/1/2013	12/30/2014
TW Memorial Corporate Offices	Vendor One	1004.28C	Administration	10/1/2014	9/30/2016
TW Memorial Corporate Offices	Vendor One	1004.3735C	Administration	12/1/2015	11/30/2016
TW Memorial Corporate Offices	Vendor One	1004.3736C	Administration	12/7/2015	12/5/2016
TW Memorial Hospitals	ABC Equipment	1005.3737C	Ancillary Services	12/1/2015	11/30/2017
TW Memorial Hospitals	Helen Bishop	1005.22E	Management	1/1/2012	12/30/2014
No. of Contracts for Contract Type: Administrative Services Agreement [7]					
Contract Type: Affiliation Agreement [2]					
Contracting Entity	Vendor (Other Party)	Number	Department	Effective Date	Expiration Date
TW Memorial Foundation	Vendor One	1006.23C	Research	7/29/2013	7/27/2016
TW Memorial Healthcare	Vendor Two	1003.25C	Cardiology	1/1/2013	12/30/2015
No. of Contracts for Contract Type: Affiliation Agreement [2]					

## 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.*

The screenshot shows the 'Custom Report Writer' interface. The top section is titled 'Select Fields for Custom Report'. It contains two lists: 'Available Fields' on the left and 'Selected Fields' on the right. The 'Available Fields' list includes Address, Administrative Percentage, Agreement Type, Annual Salary, Annual Volume, Anticipated Start/Hire Date, Anti-kickback, Asset Address City, Asset Address Line 1, Asset Address Line 2, and Asset Address State. The 'Selected Fields' list includes Contract Number, Contract Type, Vendor Other Party, Site, COI Available, and Contracting Entity. There are 'Add >' and 'Remove' buttons between the lists. Below the lists are buttons for 'Specify Limiting Criteria', 'Run Report', 'Rename Column Headers', 'Configure Sort Order', 'Save Report', and 'View Report'. A 'Next' button is at the bottom right.

The screenshot shows the 'Specify Limiting Criteria' screen. It contains a text area for 'Limiting Criteria' with the following text: (DATEDIFF(day, CASE WHEN ISDATE([Date Last Modified]) = 1 THEN CONVERT(DATETIME, [Date Last Modified]) ELSE CONVERT(DATETIME, N'1/1/9999') END, dbo.tn.GetDate()) BETWEEN 0 AND 60) AND. There are dropdown menus for 'User Instruction' (set to 'Is Equal To') and 'Limiting Value' (set to 'See all entered values'). There is an 'Add Criteria' button. Below the text area is a 'Summary of Limiting Criteria' section. At the bottom are 'Previous' and 'Next' buttons, and a 'Run Report' button.

The screenshot shows the 'Run Report' screen. It contains a 'Report Title' field with the text 'My Custom Report'. Below it is a 'Databases' list with the following items: Closing Books, Leasing, Physician Services Contracts, Service, TM Documentation, and Vendor Evaluation. There is a 'Select All' button. To the right is a 'Format' section with radio buttons for 'On Screen Viewing', 'Export to CSV (Low Level Formatting)', 'Export to Excel (High Level Formatting)', 'Export to Excel (Low Level Formatting)', 'Export to HTML (Web Archive)', and 'Export to PDF'. At the bottom are buttons for 'Previous', 'Next', 'Run Report', 'Save Report', and 'Reset Calculated Fields Values'. Below these buttons is a 'Rename Column Headers' button.

- 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.

Run Report

Rename Column Headers

You may rename the columns as they appear in the report.

Column	Revised Column
Contract Number	<input type="text" value="Contract Number"/>
Contract Type	<input type="text" value="Contract Type"/>
Vendor Other Party	<input type="text" value="Vendor Other Party"/>
Contracting Entity	<input type="text" value="Contracting Entity"/>
Annual Value	<input type="text" value="Annual Value"/>

Previous

Next

Save Report

Run Report

Configure Sort Order






Rename Column Headers

Configure Sort Order

Please select the order in which you would like to see the items appear in your report. For example, you may want to see your items listed by Expiration Date with the contracts that are about to expire listed first. If you do not make any changes, your contracts will appear in alphabetical order by the items shown below.

Select a field to sort by that isn't already in selected fields.

Add

Column	Direction	
 Contract Number	Ascending	<a href="#">Remove</a>
 Contract Type	Ascending	<a href="#">Remove</a>
 Vendor Other Party	Ascending	<a href="#">Remove</a>
 Contracting Entity	Ascending	<a href="#">Remove</a>
 Annual Value	Ascending	<a href="#">Remove</a>

Previous

Save Report

Run Report

Save Report

Configure Sort Order

Save Report

Report Title:

Description:

☐ Share Report

Previous

Save Report

Run Report

View Report


Save Report

View Report

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Export to the selected format

Export



Contract Number	Contract Type	Vendor Other Party	Site	COI Available	Contracting Entity
<a href="#">1004.28C</a>	Administrative Services Agreement	Vendor One	TW Memorial Corporate Offices		TW Memorial Corporate Offices
<a href="#">1004.3735C</a>	Administrative Services Agreement	Vendor One	TW Memorial Corporate Offices		TW Memorial Corporate Offices
<a href="#">1004.3736C</a>	Administrative Services Agreement	Vendor One	TW Memorial Corporate Offices	3736-coi.pdf	TW Memorial Corporate Offices

**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.

Configure Sort Order

Save Report

Report Title:

My Custom Report

Description:

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

☒ Share Report

Please select the users who will be able to view the report.

Bishop, Helen

Calvet, Megan

Campbell, Pete

Chambers, Dawn

Cosgrove, Ken

Bishop, Don

Francis, Betty

Holloway, Joan

Kinsey, Paul

Olson, Peggy

Pryce, Lane

Rizzo, Stan

Romano, Salvatore

Sterling, Roger

User, Example

Previous

Save Report

Run Report

View Report

## 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.

**Open Custom Report**

The following is a listing of custom reports that have been previously saved. To execute a report, please click the Report Title in the appropriate row. To access a list of Custom Reports that you want to delete, please click on the DELETE button. Please note that you can only Edit newly created reports.

Delete Cancel

Drag a column header and drop it here to group by that column

Title	Description	By	Date	
<a href="#">Auto Renewal Report</a>	This report contains lease auto-renewal information.	sysadmintw2	11/7/2012	<a href="#">Schedule</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Building Report</a>	This report contains building address and contact information.	sysadmintw2	11/7/2012	<a href="#">Schedule</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Expiration Dates</a>	The quick brown fox jumps over the lazy dog.	tmddocerin	8/21/2013	<a href="#">Schedule</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">My Custom Report</a>	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	sysadmintw1	12/28/2015	<a href="#">Schedule</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">My Custom Report</a>		editortw1	11/13/2012	<a href="#">Schedule</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Vendor Contract Effective/Expiration Dates</a>	This report contains effective and expiration dates for vendor contracts.	tmddocerin	12/27/2012	<a href="#">Schedule</a> <a href="#">Edit</a> <a href="#">Copy</a>

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Format:

☒ On Screen Viewing

☐ Export to CSV (Low Level Formatting)

☐ Export to Excel (High Level Formatting)

☐ Export to Excel (Low Level Formatting)

☐ Export to HTML (Web Archive)

☐ Export to PDF

**Scheduled Report**

Save Cancel

Schedule Name:

Report:

Report Format:

**Schedule**

☐ Once

☒ Recurring

☐ Daily

☒ Weekly

☐ Monthly

On the following days:

☐ Sun ☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Repeat every  week(s)

**Delivery Options**

☒ Email

**Advisory Notice:** Please be aware that despite permissions, any user selected from the list below shall have access to view data provided within these reports.

This scheduled report will be emailed to the user creating it and any other selected users.

To:

Cc:

Bcc:

Subject:

☒ Send report as attachment

☐ Send link to report

☐ Archive

**Custom Message**

Please note that the custom message below applies only to scheduled reports that are sent via email. It does not affect the scheduled reports that are archived. This custom message will appear above the scheduled report as a prefix.

Paragraph S... Font Name Re...

B I U abc [icons] Apply CSS ...

Custom Links Zoom [icons]

Design HTML Preview

Words: 0 Characters: 0

**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.

Open Custom Report

The following is a listing of custom reports that have been previously saved. To execute a report, please click the Report Title in the appropriate row. To access a list of Custom Reports that you want to delete, please click on the DELETE button. Please note that you can only Edit newly created reports.

Delete

Cancel

Drag a column header and drop it here to group by that column

Title	Description	By	Date	
<a href="#">Auto Renewal Report</a>	This report contains lease auto-renewal information.	sysadmintw2	11/7/2012	<a href="#">Schedule</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Building Report</a>	This report contains building address and contact information.	sysadmintw2	11/7/2012	<a href="#">Schedule</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Expiration Dates</a>	The quick brown fox jumps over the lazy dog.	trmdocerin	8/21/2013	<a href="#">Schedule</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">My Custom Report</a>	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	sysadmintw1	12/28/2015	<a href="#">Schedule</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">My Custom Report</a>		editortw1	11/13/2012	<a href="#">Schedule</a> <a href="#">Edit</a> <a href="#">Copy</a>
<a href="#">Vendor Contract Effective/Expiration Dates</a>	This report contains effective and expiration dates for vendor contracts.	trmdocerin	12/27/2012	<a href="#">Schedule</a> <a href="#">Edit</a> <a href="#">Copy</a>

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Go

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Item 1 to 6 of 6

Format:

☒ On Screen Viewing

☐ Export to CSV (Low Level Formatting)

☐ Export to Excel (High Level Formatting)

☐ Export to Excel (Low Level Formatting)

☐ Export To HTML (Web Archive)

☐ Export To PDF

Delete Custom Report

Please select the Reports(s) that you want to remove from the service. You can select multiple items by using the Ctrl or Shift keys while selecting the Titles shown in the list box below.

Expiration Dates

Vendor Contract Effective/Expiration Dates

Delete

Cancel

## 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 Number
- Contract Type and Department
- 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.

Report Writer

Financial Reports

1.) Please select which financial report is to be written:  
☒ Contract Type  
☐ Responsible Party  
☐ Vendor (Other Party)  
☐ Contracting Entity  
☐ Department  
☐ Site

2.) Please select which elements should be written:  
Administrative Services Agreement  
Affiliation Agreement

Select AllRun Report

Contract Reports

The following will report all contracts grouped by the following categories:  
[Contract Type](#)  
[Signatory Name](#)  
[Other Signatory Name](#)  
[Responsible Party](#)  
[Vendor \(Other Party\)](#)  
[Contracting Entity](#)  
[Site](#)  
[Department](#)  
[Group](#)  
[Effective Date](#)  
[Expiration Date, Contract](#)  
[COI Expiration Date, COI](#)  
[COI Effective Date](#)  
[Auto Renewal](#)  
[Critical Date](#)  
[Active Only](#)  
[Expired Only](#)  
[Archived Only](#)

Report Options

Report Layout:  
☒ Detail Report  
☐ Summary Report

Report Format:  
☒ View - Same Window  
☐ Printer Friendly - New Window

Contract Type Financial Report - Summary						
The Contract Type Financial Report will report on all the active contracts. This report is summarized by Contract Type and Vendor (Other Party).						
NOTE: The Financial Reports are based upon Est. Monthly Values. This should be taken into consideration if reviewing or reconciling with other financial systems.						
Administrative Services Agreement						
Vendor (Other Party)	Contract No.	Site	Est. Monthly Value	Est. Annual Value	Est. Total Value	
Vendor One	<a href="#">1004.21C</a>	TW Memorial Corporate Offices	\$3,500.00	\$42,000.00	\$42,000.00	
Administrative Services Agreement Subtotals:			\$3,500.00	\$42,000.00	\$42,000.00	
Affiliation Agreement						
Vendor (Other Party)	Contract No.	Site	Est. Monthly Value	Est. Annual Value	Est. Total Value	
Vendor One	<a href="#">1006.23C</a>	TW Memorial Foundation	\$2,500.00	\$30,000.00	\$30,000.00	
Vendor Two	<a href="#">1003.25C</a>	TW Memorial Hospital	\$15,000.00	\$180,000.00	\$540,000.00	
Affiliation Agreement Subtotals:			\$17,500.00	\$210,000.00	\$570,000.00	
GRAND TOTALS:			\$21,000.00	\$252,000.00	\$612,000.00	

All Contracts by Contract Type			
Administrative Services Agreement			
Contracting Entity / Vendor (Other Party)	Contract No.	Contract Type / Department	Effective Date / Expiration Date
TW Memorial Corporate Offices / Vendor One	<a href="#">1004.21C</a>	Administrative Services Agreement / Administration	Feb 01, 2013 / Evergreen
TW Memorial Corporate Offices / Vendor One	<a href="#">1004.24E</a>	Administrative Services Agreement / Administration	Aug 01, 2013 / Dec 31, 2014
TW Memorial Corporate Offices / Vendor One	<a href="#">1004.28C</a>	Administrative Services Agreement / Administration	Oct 01, 2014 / Oct 01, 2016
TW Memorial Corporate Offices / Vendor One	<a href="#">1004.3735C</a>	Administrative Services Agreement / Administration	Dec 01, 2015 / Dec 01, 2016
TW Memorial Corporate Offices / Vendor One	<a href="#">1004.3736C</a>	Administrative Services Agreement / Administration	Dec 07, 2015 / Dec 06, 2016
TW Memorial Hospitals / ABC Equipment	<a href="#">1005.3737C</a>	Administrative Services Agreement / Ancillary Services	Dec 01, 2015 / Dec 01, 2017
TW Memorial Hospitals / Helen Bishop	<a href="#">1005.22E</a>	Administrative Services Agreement / Management	Jan 01, 2012 / Dec 31, 2014
No. of Contracts			7
Affiliation Agreement			
Contracting Entity / Vendor (Other Party)	Contract No.	Contract Type / Department	Effective Date / Expiration Date
TW Memorial Foundation / Vendor One	<a href="#">1006.23C</a>	Affiliation Agreement / Research	Jul 29, 2013 / Jul 28, 2016
TW Memorial Healthcare / Vendor Two	<a href="#">1003.25C</a>	Affiliation Agreement / Cardiology	Jan 01, 2013 / Dec 31, 2015
No. of Contracts			2
Clinical Study Agreement			
Contracting Entity / Vendor (Other Party)	Contract No.	Contract Type / Department	Effective Date / Expiration Date
TW Memorial Foundation / Vendor Three	<a href="#">1006.26C</a>	Clinical Study Agreement / Research	Jul 30, 2013 / Evergreen
No. of Contracts			1