

Specific Reports

Logged In User (My Contracts)

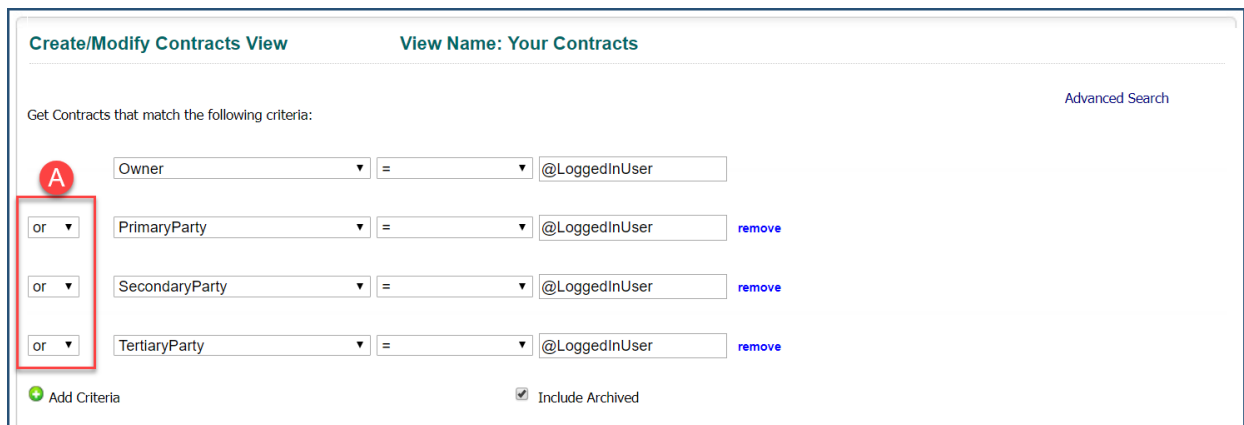
Purpose:

Creating this view, and sharing it with everyone in your organization, you can be sure that every user will have a view of all the contracts where they are listed as either the Owner, or one of the Responsible Parties.

Search Criteria:

The Criteria needed to make this View is very simple, but must be followed EXACTLY.

- You'll want to have *Owner, PrimaryParty, SecondaryParty, & TertiaryParty* as your criteria
- Then, for each, have **@LoggedInUser** set as the value to search by
 - o *This term will allow you to share this view out with your entire company, and the system will automatically filter this view based on the User who is Logged In.*
- You NEED to set the And/Or dropdown to **OR (A)** for each one, otherwise the report will return no results.
- You can decide whether or not to enable the *Include Archived* checkbox



The screenshot shows the 'Create/Modify Contracts View' interface for a view named 'Your Contracts'. It displays a search criteria configuration with four rows, each representing a different party type. The criteria are: Owner, PrimaryParty, SecondaryParty, and TertiaryParty. Each criterion is set to be equal to '@LoggedInUser'. The search logic is set to 'OR (A)', which is highlighted with a red box. There are 'remove' buttons next to each criterion. At the bottom, there is an 'Add Criteria' button and a checked 'Include Archived' checkbox.

Logic	Field	Operator	Value	Action
	Owner	=	@LoggedInUser	
or	PrimaryParty	=	@LoggedInUser	remove
or	SecondaryParty	=	@LoggedInUser	remove
or	TertiaryParty	=	@LoggedInUser	remove

Add Criteria Include Archived

Report Set-Up:

You can use the Default Fields and Sort Order to make sure your report is always displaying with only the information you want, and sorted how you'd like.

- We have our Grid set to show us the:

Contract Name | Owner | Effective Date | Expiration Date | Primary Party | Secondary | Tertiary

- If you have *Include Archive* selected, you'll want to include the Archived column in your Grid
- We then have it *Sorted* by the Contract Name, but it could be set on any of the other information we have displaying in our grid.
- You can adjust the information displaying in your grid exactly how you would any other Grid in UCM, doing so here will just make it so that everytime you are viewing this report it is set the same.

Sharing the Report:

- To have this View be sent out to all the users of your organization, you must first check the **Save This View** checkbox, and then the **Share View With Others** checkbox will appear.
- When you check that box, then check the **Select All** box above the list of your Users
 - o *SECURITY NOTE: When you SHARE a View, the system will automatically take into account the Users Folder Permissions, so there is no need to worry about a shared view allowing a User to see Contracts or Information that they shouldn't.*
- This view will now appear in your Users Saved Views box on the Contracts Tab with a Red "S" in a white circle next to it's name, letting them know the View was shared with them.

Default Fields And Sequence

ContractName	Owner	Effective Date	Expiration Date	PrimaryParty	SecondaryParty	TertiaryParty
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Default Sort Order

Fields: Ascending Order (A-Z) Descending Order (Z-A)

Fields	Sort Order	Delete
BG Demo::ContractName	Ascending	<input type="button" value="X"/>

Additional Statistics

--Select-- | ----Select Fields---- | Display Count

Save this View Default View
*View Name:

Share With Other Users

Note: 18 characters of your View Name will show in Contract Views, but the whole View Name will show on hover-over

Select All Select All

Select	Role Models
<input type="checkbox"/>	Everything Enabled
<input type="checkbox"/>	No Permissions

Select	Users
<input checked="" type="checkbox"/>	Bryan Gilliss (bgilliss)
<input checked="" type="checkbox"/>	Charlotte Wilson (cwilson)
<input checked="" type="checkbox"/>	Chloe Lewis (clewis)
<input checked="" type="checkbox"/>	Grace Rodriguez (grodriquez)
<input checked="" type="checkbox"/>	iContracts Administrator

Schedule This View