

Specific Reports

Activated/Executed Last Quarter

Purpose:

This report does require a little bit of outside UCM math, but with just a little bit of tweaking, you'll be able to have a saved Quarterly report that you can adjust in under a minute to get all your Contracts that were Activated/Executed during a particular Quarter.

Necessary Prior Information:

Before you begin creating or editing your report, there are two numbers you'll need to use a Date Calculator for. You can find one by simply searching "**Date Calculator**". I personally used the first link on Google, but any of them will work.

- The two numbers you are looking for are:
 - o Number of Days Since the START of the Quarter you want to report on
 - o Number of Days Since the END of the Quarter you want to report on
- These numbers will be needed for setting the parameters of the search criteria laid out on the next page.
- *Below are two examples of how to calculate the Days using January 1st – March 31st as our First Quarter of 2019, and the current date being May 3rd, 2019.*

Number of Days Since START

Start Date

Month: Day: Year: Date:

1 / 1 / 2019

Today

End Date

Month: Day: Year: Date:

5 / 3 / 2019

Today

Include end date in calculation (1 day is added)

Add time fields
Add time zone conversion

Count only workdays

Calculate Duration

From and including: **Tuesday, January 1, 2019**

To and including: **Friday, May 3, 2019**

Result: 123 days

It is 123 days from the start date to the end date, end date included.

Or 4 months, 3 days including the end date.

Number of Days Since END

Start Date

Month: Day: Year: Date:

3 / 31 / 2019

Today

End Date

Month: Day: Year: Date:

5 / 3 / 2019

Today

Include end date in calculation (1 day is added)

Add time fields
Add time zone conversion

Count only workdays

Calculate Duration

From and including: **Sunday, March 31, 2019**

To and including: **Friday, May 3, 2019**

Result: 34 days

It is 34 days from the start date to the end date, end date included.

Or 1 month, 4 days including the end date.

Alternative time units

34 days can be converted to one of these units:

- 2,937,600 seconds
- 48,960 minutes
- 816 hours
- 34 days
- 4 weeks and 6 days

Search Criteria:

The Criteria set up for this view is VERY important to be followed EXACTLY how we have it laid out in the image below, with the exception being the specific numbers of days, which will vary not only per organization, but also per day that you are creating this report.

- The first step will be to select the **Advanced Search (A)** option so you can use the parenthesis brackets for this View.
 - o *Ours says Simple Search in the image because we are already in Advanced Search*
- Your *StageName* should be set to whatever your organization uses as their Active/Executed stage.
- The first *DaysInCurrStage* should be set to the < (*less than*) symbol, and the number should be the **Days Since START** of the Quarter you are looking to report on
- The second *DaysInCurrStage* should be set to the > (*greater than*) symbol, and the number should be the **Days Since END** of the Quarter you are looking to report on
- Place parenthesis around the first two, and last two sets of Criteria
- Make sure all three (3) And/Or dropdowns are set to **AND**

The screenshot shows a web interface for creating or modifying a view. The title is "Create/Modify Contracts View" and the view name is "Activated Last Quarter". There are two search options: "Simple Search" and "Advanced Search (A)", with the latter being selected. The search criteria are defined as follows:

- Criteria 1: StageName contains Active (enclosed in parentheses)
- Criteria 2: DaysInCurrStage < 123 (labeled "Days Since START")
- Criteria 3: StageName contains Active (with a "remove" button)
- Criteria 4: DaysInCurrStage > 34 (labeled "Days Since END")

At the bottom, there are buttons for "Add Criteria" and a checkbox for "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:

Contract Name | Type | Owner | Workflow | Stage | Days in Stage | Effective Date | Expiration Date

- 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.
- We then have it *Sorted* by the Contract Type, but it could be set on any of the other information we have displaying in our grid.

Default Fields And Sequence

ContractName	ContractTypeName	Owner	Workflow	StageName	DaysInCurr Stage	Effective Date	Expiration Date	
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Default Sort Order

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

Fields	Sort Order	Delete
BG Demo::ContractTypeName	Ascending	

Additional Statistics

--Select-- Display Count

Save this View Default View
*View Name:
 Share With Other Users
 Schedule This View

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