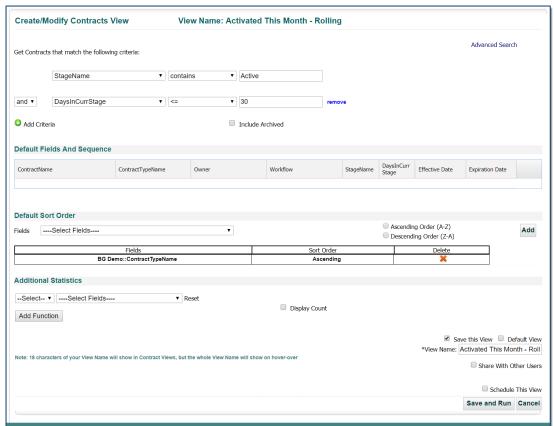# Specific Reports
Activated/Executed Last Month

Purpose :

These reports are designed to be built as two separate reports, one that is scheduled, and one that is dynamic for using throughout the month. The criteria you set for both are identical, however, one of them you'll want to Schedule to have sent to yourself at the beginning of each month, and the other, you can edit on the fly during the month.

Activated This Month - Rolling:

Copy the Criteria set in the image below to see all of the contracts that have entered into the *Active* Stage of any of your Workflows during the CURRENT month.

- You may not call your stage **Active**, it may be **Exectued** or something similar, so adjust the *StageName* accordingly.
- Make sure the And/Or dropdown is set to *AND*.
- Since this is our Rolling Report, the Number for DaysInCurStage should be set for the amount of days that have past in the month so far to give you JUST the contracts that have been Activated this Month.
- Use the Default Fields & Sequences to set what information you want to see on your Report.
- Set the Default Sort order have your information already sorted when you export your Report.

Create/Modify Contracts View   **View Name: Activated This Month - Rolling**

Advanced Search

Get Contracts that match the following criteria:

| StageName ▼ | contains ▼ | Active |

| and ▼ | DaysInCurrStage ▼ | <= ▼ | 30 | remove |

⊕ Add Criteria   ☐ Include Archived

Default Fields And Sequence

| ContractName | ContractTypeName | Owner | Workflow | StageName | DaysInCurr Stage | Effective Date | Expiration Date | |

Default Sort Order

Fields ----Select Fields---- ▼   ○ Ascending Order (A-Z)   Add
                                          ○ Descending Order (Z-A)

Fields	Sort Order	Delete
BG Demo::ContractTypeName	Ascending	✖

Additional Statistics

--Select-- ▼ ----Select Fields---- ▼ Reset   ☐ Display Count

Add Function

☑ Save this View ☐ Default View
*View Name: Activated This Month - Roll

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

☐ Share With Other Users

☐ Schedule This View

Save and Run Cancel

Activated Last Month – Scheduled :

Copy the Criteria set in the image on the previous page to see all of the contracts that have entered into the *Active* Stage of any of your Workflows during LAST month.

- The only difference between THIS Month and LAST Month reports are that we DO want have our DaysInCurrStage set to **30**, and *left that way*.
- We want to leave it this way, because we won't ever come into and View this Report throughout the month, but rather we'll schedule this Report to be emailed to us directly on the first of every month.
- After we've checked the **Save This View** checkbox, you'll be able to select the **Schedule This View** checkbox.
- Once selected, you'll have the options below to set when you want to receive this report, how often, for how long, and who will receive it.
    - *SECURITY NOTE: Unlike sharing a View, which will take a Users Folder Permissions into account, anyone who you select here to receive an emailed Report of this view will see WHAT THE VIEW CREATOR SEES. This means that Security Permissions DO NOT apply to Scheduled Reports.*
- To make this a true Monthly Report, set the Scheduled Settings as we have in the image below:
    - **Trigger Time**: 6AM
    - **Recurrence Pattern**: Monthly | Day (**1**) of every (**1**) months
    - **Range of Reccurance**: Start: *Leave as Today's Date* | End after (**120**) occurances
    - **Users:** ONLY select yourself
- Select **Add Schedule** before Saving to make sure your Report will be sent