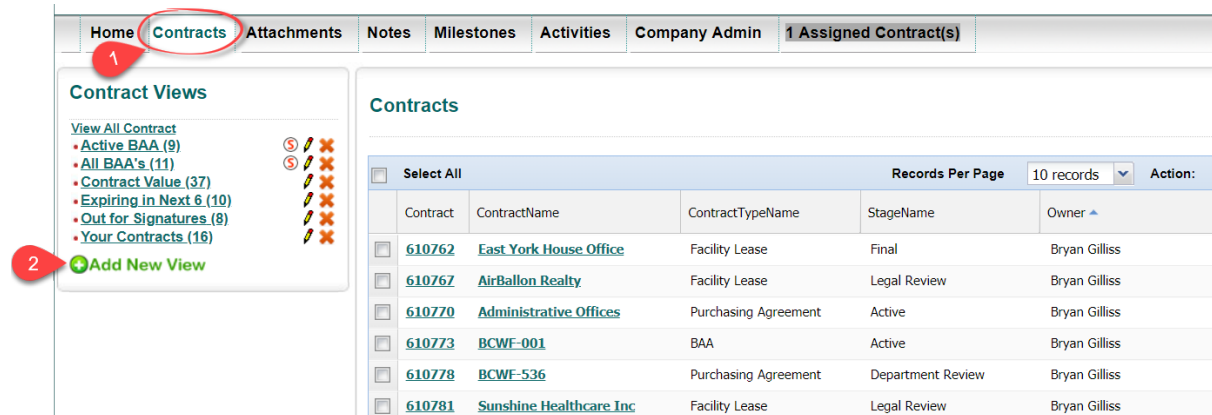# Views: Reports, Tips, & Tricks

Views are a great tool within UCM that can be used to find groups of contracts and create reports from ANY data field within your system. Whether it is a default UCM field, or a custom field, you can use views to find any specific contract or groups of contracts you'll need.

You can also use these views to create reports by exporting all of the data in your view to a CSV Excel file. Your reports can also be set on a schedule to be emailed directly to you whenever and as often as you need!

- *Every tab that is active in your top Enterprise Ribbon has the ability to create views, however, not every feature is available under each tab. We will be using the Contracts Tab for our examples, as it has every feature, but if you are ever making a view and don't see a feature, check which enterprise tab you are under, and contact support for information on feature availability.*
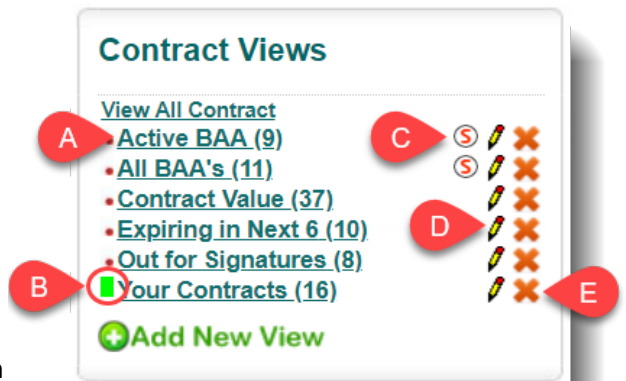
Creating your View:

- From the **Contracts** tab in the Enterprise Ribbon **(1)**, select **Add New View (2)**

- The box that the Add New View button is located in, is where all of your saved Views will be listed
- There are also some important icons and highlights when looking at this box:
  - **Name of the View (***# of Contracts in View***) (A)**
  - **Green Box** – If you set a created view as a **Default View**, identified by the green box **(B)**
  - **(S)** – Red "S" in a circle is for any views that were created by another User and shared with you. Hovering over the icon will tell you who shared the view with you **(C)**
  - **Edit View Pencil (D)**
  - **Delete View (E)**

Creating your View (cont.):

- Once inside the Add New View screen, there are four different main sections, and an optional Save/Schedule feature:
  - **Create/Modify Contracts View (A)**
    - *Where you select the search Criteria of your View/Report*
  - **Default Fields and Sequence (B)**
    - *Where you select what data is a part of your grid in UCM, and how it is sorted. Also, the same set and order of data for your CSV Report file*
  - **Default Sort Order (C)**
    - *Set the way you would like your data to be sorted (Contract Name, Value, Expiration Date, etc…). Can have multiple sub-sorting rules as well*
  - **Additional Statistics (D)**
    - *Strictly for NUMERIC fields. Can calculate the Total (SUM), or Average (AVG) of any sets of Numeric field data*
  - **Save this View (E)**
    - *Ability to Save your view. Checking the box enables more options to appear like making it a Default View, Sharing, and Scheduling.*

Create/Modify Contracts View:

The first thing that must be defined when creating your View is deciding what Criteria will be used to filter your contracts. This can be as simple as just searching for all contracts with a particular Vendor Name or Contract Owner, or it can get as complex as finding contracts with a value over/under a certain amount, with an expiration date approaching within a set number of days, and only from specific users.

- When first setting up your View, you must select the Criteria from Dropdown and Text Boxes:
  - o **(1) UCM Field Selection**: Dropdown menu to select either a UCM Default field like *ContractName, Owner, Workflow, StageName, PrimaryDocument*, or *ANY* of the user created Fields.
  - o **(2) Search Parameters**: Dropdown that will be slightly different based on what field is selected. Will have criteria like *Contains, Starts With, Ends With, = (equals), > (greater than), etc.*
  - o **(3) Criteria Definition**: Textbox (*usually*) where you define your exact Criteria. Can be the name of an Owner, Specific Date, Monetary Value, possibly even a Dropdown menu of "Exists/Does Not Exist".
  - o **(4) Add Criteria**: Views are able to have more than one Criteria. When this icon is pressed, a new set of Field/Parameters/Definition will appear, with an additional selection box of **And/Or**.
  - o **(5) Include Archive**: Checkbox to decide if your View will include Archived Contracts within your system
  - o **(6) Advanced Search**: Gives the ability to create a more detailed search consisting of multiple And/Or Criteria with parentheses to separate different groups of searches.

Create/Modify Contracts View

6 → Advanced Search

Get Contracts that match the following criteria:

1 | Owner ▼ | 2 | = ▼ | 3 | Mason Granville |

4   ⊕ Add Criteria   5   ☐ Include Archived

* In the example above, our view would give us back all the contracts within our system that Mason Granville was the owner, excluding any that had been Archived.

UCM VISABILITY/SECURITY NOTE: *ALL* Views and Reports follow a User's Folder and Security permissions. A User cannot gain access to Contracts they are restricted from viewing through Views, even through Shared Views.

Create/Modify Contracts View (Multi-Criteria):

If our previous example yielded us all Contracts where Mason was an Owner, our next example will show how to narrow that down even further with adding Additional Criteria.

- Let's say we wanted to set up a view to see all of Mason's Contracts that have been sitting in any Legal Stage of our Workflows for 2 weeks or more:
    - **(A)** Set up our first Criteria to filter down to Contracts with an *Owner* who *Equals* (=) *Mason Granville*.
    - **(B)** **AND** (*as opposed to OR, AND makes the following Criteria in addition to the previous Criteria*)
    - **(C)** **StageName** (*The Current Stage Name that the Contract is in*) *contains* (*the second dropdown could be set to different options, but we want to see every stage that has Legal in its name*) **Legal** (*The name, or part of a name, of the Stage*)
    - **(D)** **DaysInCurrStage** (*The number of days that the Contract has been in the Current Stage*) **>=** (*Greater than or equal to*) **14** (*days*)

- Let's say we wanted to set up a view to see all of Mason *AND* Bryan's Contracts. We can't use the AND search Criteria, since we cannot have a Contract with two owners, instead we need to use the **OR** function **(1)**.
    - This will give us all our Contracts where Mason Granville **OR** Bryan Gilliss is the owner, giving us BOTH within our search results, despite NOT using *AND*. This is an important clarification on which to use and when. Also, always check your And/Or selection if a view is not returning the results you are looking for.

Create/Modify Contracts View (**Advanced Search**):

There may come a time where you'll need to create views using both the And/Or functions. This could be for a view where you need to see all of your Contracts that have a Value over $10,000, that are Expiring within the next 180 days, but ONLY those that belong to Mason or Bryan. To do so, we'll have to use our **Advanced Search** feature.

- After selecting **Advanced Search** from the right side of the screen (*p.3*) there will be some new boxes that appear with + and – symbols next to them. These are to add in parenthesis around your search criteria to create groups. The rest of the "original" Search Criteria stay and operate the same, but there is some understanding that needs to be had with the parenthesis and the And/Or functionality.
    - o **(A) First set of Parenthesis**: Pressing the + symbol will add a parenthesis. Pressing the – symbol will remove a parenthesis. You can have multiple parentheses, creating groups inside of groups if needed.
    - o **(B) And**: Keeping this set to AND since we want the Contract Value AND the Expiration Date to be a combined search criteria within our first group.
    - o **(C) And**: This is outside, but between, our Criteria Groups. Being set to AND means that the system will only show us the contracts that meet the parameters of BOTH our criteria groups.
    - o **(D) Second set of Parenthesis**: Placing a Single Set of Parenthesis around our second group of Criteria.
    - o **(E) Or**: Much like our previous View Example, you cannot have Multiple Owners, so if we wanted to see the Contracts of BOTH Mason and Bryan, we use the OR selection here.


* There are also two (2) links above to help with setting up Advanced Views, directly within UCM. Work as great reminder tips if you do not have access to our Step-by-Step guides or videos.
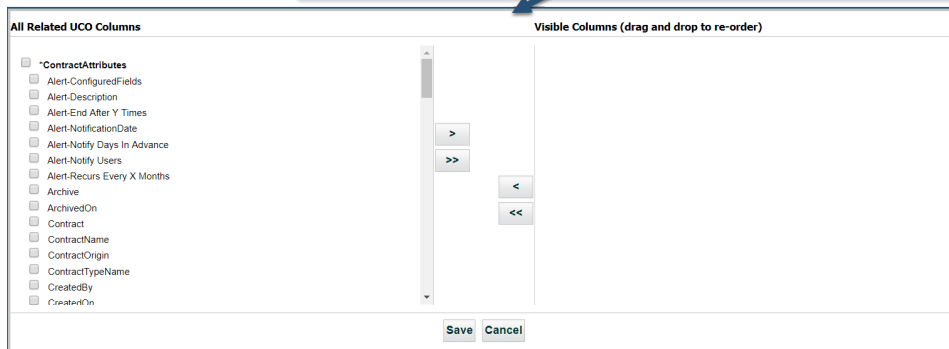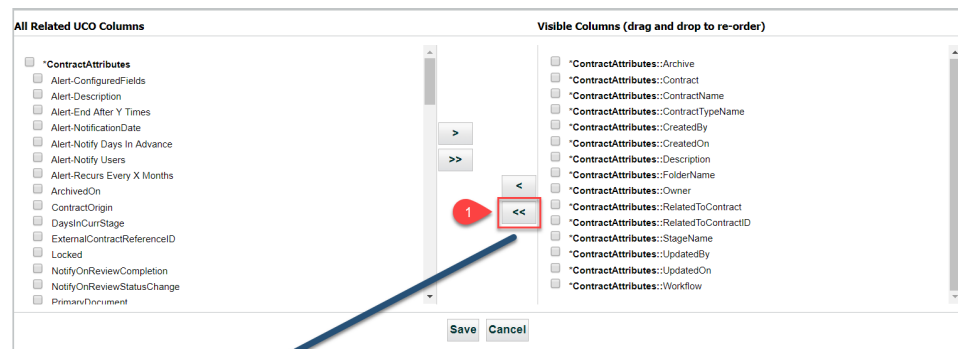
Default Fields and Sequence:

Being able to narrow down your possibly thousands of contracts to just a handful in just a few moments is obviously a great tool, and an important skill to master. Does it really help though if you don't have all the data you need, or have too much cluttering up the important information? Using the **Default Fields and Sequence** section to pre-organize and set your grid to ONLY show the information YOU want!!

- By default, your Grid is set with the headers you were most previously using. If it's your first time creating a view, this could be a large number.
- By hovering over any of the Grid Headers, click the down arrow **(1)**, and then select **Columns (2)** to bring up the Left-Right Pop Out Screen to make organizing your grid easier.
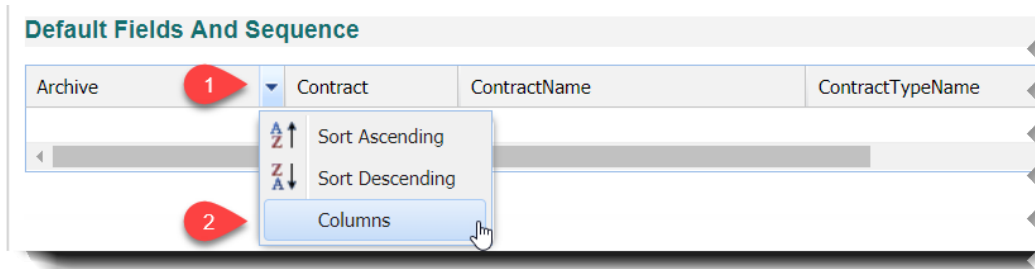
** This is the first section that changes slightly depending on what you are creating views for. Every View can have a custom Grid organization, but only in **Contracts** can you use the Left-Right Pop Out to organize. The other View creations use a checkbox drop down menu to select the Grid Headers, and then use the Drag-Drop method to re-organize.*

- Once you have the Left-Right pop out, you'll see your default Grid headers to the right. Click the **Double Left Arrows (<<) (A)** to move everything from the right to the left. You now have a clean slate to work with.

Default Fields and Sequence (cont.):

- Now that we have a clean slate to work with, we can select the Fields we want to be our Grid Headers, and have their data included for our report.
- You may also notice that our Fields are grouped by Field Categories on the Left side (Highlighted in **Bold**) **(A)**, and then in Alphabetical Order.
- To move your selected Fields, simply check the box **(B)** next to each Field you want to be included in your View and select the **Single Right Arrow** (>) **(C)**.
    - o **IMPORTANT NOTE:** *DO NOT hit the Double Right Arrows (>>)* **(D)** *or EVERYTHING you selected will be ignored, and EVERY Field available on the Left, selected or not, will move to the Right and you'll have to restart the process.*
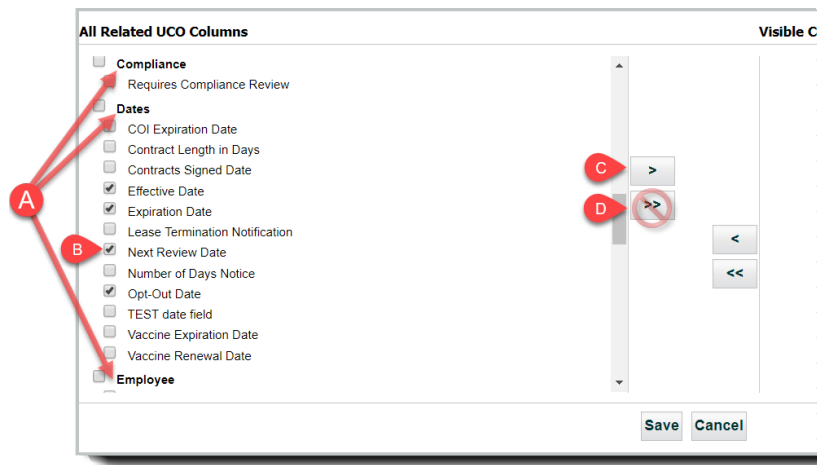
- Once clicking the Single Right Arrow, your Selected fields will move to the right, grouped by Category first, then Field Name in alphabetical order.
- To set them in the order you wish, just **Drag & Drop** them in the order you want to appear **(1)**
- If there are any Fields you decided you don't want, you can select a specific Field **(2)** from the right and click the Single Left Arrow (<) **(2)** to move it out of your grid.
    - o These methods all work for Editing your View in the Future as well
- Once you have your Fields selected and in the correct viewing order, click **Save (3)**
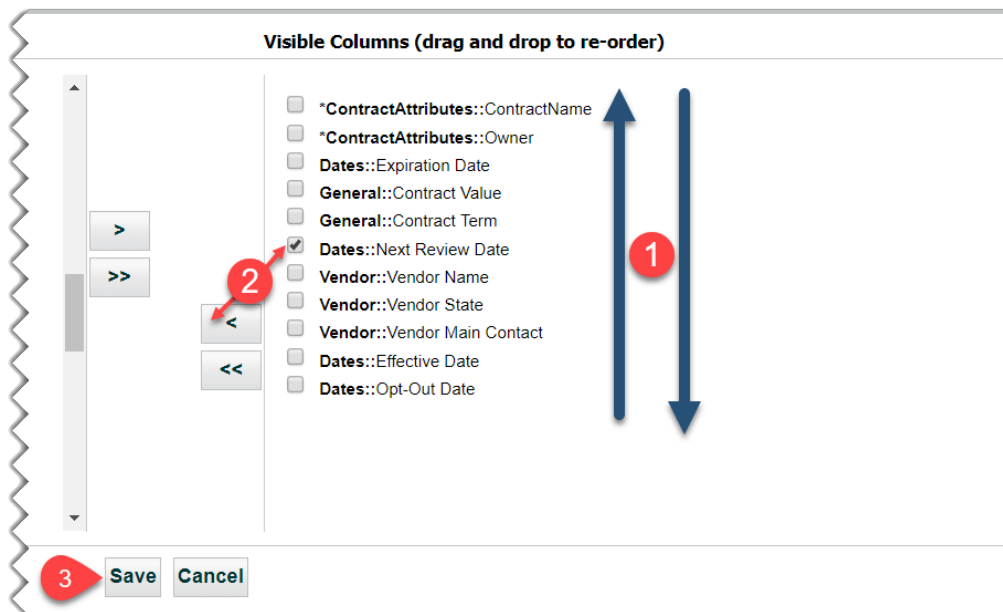
Default Fields and Sequence (cont.):

- After you Save, you'll see an example of your Grid Headers, with the option to Resize each Column to the width you need. This is how your grid will appear each time you, or anyone who has an un-edited Shared View, will see their Grid by default.
- The goal here is to set the Grid once and forget it, but any View can also have it's Grid edited on the fly while viewing it, but only Edits and Saves from here will persist to future sessions.

Default Fields And Sequence

ContractName	Owner	Expiration Date	Contract Value	Contract Term	Vendor Name	Vendor State	Vendor Main Contact	Effective Date	Opt-Out Date

Default Sort Order:

You can also set what the Default Sort Order of your new View is going to be. Staying with our example of Mason and Bryan's contracts, let's say that we want to view them group by their Owner, but also seeing the contracts that are nearing Expiration the soonest.

- To begin, we'd want to select Owner from the **Fields Dropdown (A)**, and then we can choose either *Ascending* or *Descending* order **(B)**.
- Select **Add (C)** to apply the Sort Order

Default Sort Order

Fields	Owner	(A)	(B) ● Ascending Order (A-Z) ○ Descending Order (Z-A)	(C) Add
Fields		Sort Order		Delete

- Once added, the Sort Order will appear in a small table below **(1)**
- Too add a second Sort Order, just change the Dropdown to the next field to sort by, in our example that would be **Expiration Date (2)**, and then select *Ascending* or *Descending* again.
  - *When it applies to dates, Ascending means that the earliest, or furthest away from today's, date will appear first. Descending will give you the most recent date first. **Ex**. 01/01/2018 will appear **BEFORE** 06/31/2018 with **Ascending***
- Since we want to see the Contracts that are expiring soon first, we will keep *Ascending* **(3)**
- Select **Add (4)** again to add your second Sort Order

Default Sort Order

Fields	Expiration Date	(2)	(3) ● Ascending Order (A-Z) ○ Descending Order (Z-A)	(4) Add
(1) Fields		Sort Order		Delete
BG Demo::Owner		Ascending		✖

* If you use the Sort Order function for your Views, the order of Sorting is based off the order they were added. So for our example above, UCM will sort all of our Contracts that meet our View Criteria by the Owner first Two total groups, (Bryan and Mason), and THEN Sort those two groups by Expiration Date with the nearest Expiration Date at the top.

Additional Statistics:

The final section that is available without Saving your View is **Additional Statistics**, where you can get the either or both, the Average (**AVG**) or Total (**SUM**) of a Numeric Field within your system, even if it is not a Field included in your View.

For our example, we're going to set it up to give us the Average and Total of the Contract Values that get returned in our view.

- Set the first Dropdown to **SUM** to get the Total, and then select the field you want to get the total of (ex. **Contract Value**) **(A)**
- Click **Add Function (B)** to have a second dropdown menu appear
- Set the new Dropdown to **AVG** to get the Average of our **Contract Value** field **(C)**
- To see how many Contracts are being calculated, check the **Display Count** checkbox **(D)**
- There is no Save button for this area, just leave these set how they are and move to either Running or Saving your View.
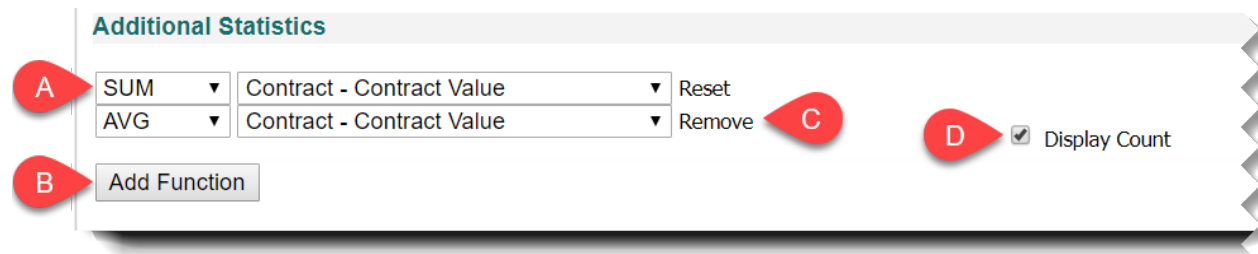
Saving/Running View:

The last decision that now has to be made is whether to just Run your view once, or Save it for future use. Sometimes you just need a quick report that you may only need once, and you can just select **Run (1)**.

However, if you've spent the time to set up a view like our example, with multiple Criteria, a carefully constructed Grid, thoughtful Sorting, and mathematical data, we probably want to **Save this View (2)** instead.
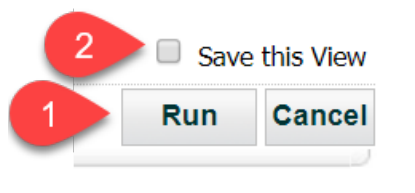
Checking that box opens up a whole new set of options available to us, including **Sharing & Scheduling** our view.

Saving View:

- Once you check **Save this View**, a Textbox and three (3) checkboxes appear:
  - o **Default View (A)**
    - ▪ Make ONE of your created Views the default when you go to that Enterprise Tab. Can only have one active Default View per user, per Tab. Selecting Default View when one is already selected just overwrites the previous Default View.
  - o *View Name* **(B)**
    - ▪ Textbox to name your View whatever you'd like. Sometimes a specific name helps, like in our example (*Bryan and Mason - 10k/6months*).
    - ▪ *Other suggested naming conventions include using the "Topic" as a first name and the "Details" following (ex. Workflow – Legal Review over 2 Weeks, Workflow – Budget Review over 5 Days, etc.)*
  - o **Share With Other Users (C)**
    - ▪ Any views you create and save can be shared with other users in your system if your permissions allow. We will go over in more detail on the following pages.
  - o **Schedule This View (D)**
    - ▪ There are some Views, and subsequently Reports, that you may want to receive on a fairly regular basis. Checking the Schedule This View box will expand to allow you to set up the frequency and recipients of your views report. Will go over in more detail on the following pages.
- **Save and Run (E)**
  - o Once you have everything set the way you want, Select **Save and Run**.

Saving View (Share With Other Users):

If you have Sharing permissions (set by your Administrator) you can Share any of your created Views with other users of the system. This can be helpful in a couple different ways, like if you are an Admin or Power User who wants all your users to have a specific View available to them, or even if you have a user who is maybe struggling to find a particular set of contracts, you can aid them by creating a quick view and sharing it with them.

- After checking the **Share View With Others** box, two selection boxes will appear, one for Role Models **(A)**, and the other for specific Users **(B)**.
- Check the box next to any User or Role Model you want to share your View with **(C)**
    - *EVERY user attached to that Role Mode will receive the shared View, use cautiously*
- Like **Additional Statistics**, there is no direct Save button here, just leave your Users checked and they will receive the Shared View as soon as you click Save and Run.

Saving View (Schedule This View):

Scheduling a view is a great tool for Reports that are needed on a fairly regular schedule, regardless of the time between recurrences (*daily, weekly, monthly, annual*). When you schedule a View, you are simply sending all the data that is a part of that View to your email in the form of a CSV file, just like what the Report icon does. You can also choose other users of your system to receive the Report file along with you. *(Scheduling is currently ONLY available on Contract Views)*

- You can check the **Schedule This View** checkbox at any time, and you'll get a few options that appear below.
- The three boxes on the right set WHEN your Report will go out:
  o **Trigger Time (A)**
    ▪ The time of day that the Report gets sent (*30 minute intervals*)
  o **Recurrence Pattern (B)**
    ▪ Set how often the Report gets sent out (*Daily, Weekly, Monthly, Yearly*)
    ▪ Set the period between each recurrence (*Range type changes based on previous time range*)
    ▪ Choose which day(s) the report will be sent out on (*Options change as well*)
  o **Range of Recurrence (C)**
    ▪ Choose the **Start Date** that your Report first gets sent out
    ▪ Decide between a set Number of **Occurrences** or a specific **End Date** for the Reports to STOP being sent
- The selection box on the right determines WHO receives the report **(D)**
  o *You **NEED** to select yourself from the list to receive the report*
  o ***SECURITY DISCLOSURE: When Sharing a Scheduled report, ANY user you select from this box will see YOUR report. Security setting <u>DO NOT APPLY</u> to a CSV file being made by UCM. This means that if your report could potentially have sensitive information, you will want to consider WHO will receive the un-edited report.***
- Click **Add Schedule** to Schedule your View **(E)**.
  o It is possible to have multiple schedules if needed
- Once you're completely done setting up your View, select **Save and Run (F)**

Viewing and Reporting:

Once you create, and Save, your new View, it will get added to the list over on the left side of your screen that we covered on the first page of this guide. If you set it as your Default View, you will also see the small green box next to its name.

If you happened to run the view, it's appearing in the View box, *but* there is no data in your grid, then your criteria yielded no results. This doesn't always mean there is something wrong with your View, you just may simply not have any contracts that meet your criteria in your system currently. Views are dynamic, and will constantly be checking to see if there are any contracts that match its criteria. If you need to make sure that your View works, you can always make a "Test" contract that you know meets the criteria of your contract to test it.

- Looking at our View, we can see all our criteria and sort options at work, as well as our calculated SUM and AVG:
  - o Our **Grid Headers**, with only those we want to see, and in the order we want to see them **(A)**
  - o Our first **Sort** order, by the **Owner (B)**, followed by our second **Sort** order of **Expiration Date (C)**, resetting itself when the Owner changes
  - o Below, we our **Calculated Data (D)**, giving us our SUM, AVG, and Total count
  - o In addition to the count with our calculated data, you always have a display and total count in the bottom right of each View Grid **(E)**
  - o **Edit View (F)**: Takes you back to the previous set-up screen where you can edit your view in any way, and if you save under a different name, it creates a new view, so this also works like a **Copy** tool as well if you need to make a couple views that are all very similar.
  - o **Report (G)**: Manually download a CSV file of your View. You will get a pop-up asking if you want to download a Regular or a Bulk Load file. The only difference is the way the headers are labeled in your CSV file. If you only need a Report for data purposes, Regular is the type you'd want.

Viewing and Reporting (cont.):

If you have your report Scheduled, you'll receive a CSV file in an email at your scheduled time that will look virtually identical to what you receive when you press the Report icon from your Views page.

- The CSV file has identical data as your Grid on it, sort order and all, the layout and display is just a little different inside of Excel:
    - o **(A) View/Report Name**
    - o **(B) Grid/Field Headers**
    - o **(C) Calculated Data and Display Count** (*Not on SCHEDULED REPORTS*)
        - ▪ *You are obviously able to get these numbers through Excel itself, but if this information is some you'll be needing regularly, let UCM do the work for you!!*

	A	B	C	D	E	F	G	H	I	J
1	Contracts: Bryan and Mason - 10k/6 months									
2										
3	ContractName	Owner	Expiration Date	Contract Value	Vendor Name	Vendor State	Vendor Main Contact	Effective Date	Opt-Out Date	
4	Kellogs	Bryan Gilliss	1/19/2019	46879	Kellogs	CA	James Robinson	11/2/2015	12/5/2018	
5	Heinz LLC	Bryan Gilliss	2/24/2019	24524	Heinz LLC	IL	Theo Parker	11/25/2015	8/28/2018	
6	FoodTec POS	Bryan Gilliss	2/26/2019	76857	FoodTec	WV	Larry Barnes	7/7/2015	12/28/2018	
7	Cooper Hospital	Bryan Gilliss	3/10/2019	234623	Cooper Hospital	NY	James Robinson	10/7/2017	1/9/2019	
8	Red Cross	Bryan Gilliss	3/27/2019	123623	Red Cross	DC	Reed Banner	6/4/2015	12/27/2018	
9	Philadelphia Pharmaceuticals	Bryan Gilliss	5/5/2019	346432	Virtua Medical	PA	Naomi Graves	6/10/2015	4/5/2019	
10	AirBallon Realty	Bryan Gilliss	5/17/2019	33500	AirBallon Realty	NJ	Diane Summers	7/1/2015		
11	Eggo Inc	Bryan Gilliss	5/19/2019	235746	Eggo	GA	Mable Sanderson	7/16/2018		
12	ABC Internet	Bryan Gilliss	6/6/2019	87535	ABC Internet	CA	James Robinson	5/15/2017	3/8/2019	
13	Administrative Offices	Bryan Gilliss	6/7/2019	74536	iContracts	NJ	Joe Smith	2/23/2017	4/23/2019	
14	BCWF-074	Mason Granville	2/6/2019	46857	Builders & Contractors Workers Force	PA	Naomi Graves	8/31/2016	12/8/2018	
15	Sunshine Healthcare Inc	Mason Granville	2/6/2019	12345	Sunshine Healthcare Inc	AL	Christina Francis	6/29/2018		
16	Aramark - Food Supplies	Mason Granville	2/28/2019	10000	Aramark	NJ	Frank Abernathy	11/30/2018	11/30/2018	
17	Smith, Steve MD	Mason Granville	3/9/2019	79853	Virtua Medical	NJ	Wesley Keenan	6/4/2016	1/8/2019	
18	East York House Office	Mason Granville	3/16/2019	45000	Airballoon Realty	NJ	Diane Summers	2/17/2017		
19	Sunshine Healthcare Inc	Mason Granville	3/31/2019	40000	Sunshine Health Services	FL	Krista Frank	12/1/2018		
20	PNC Bank	Mason Granville	5/13/2019	64046	PNC Bank	NJ	Wesley Keenan	6/14/2015	2/12/2019	
21	Aramark - Uniforms	Mason Granville	6/9/2019	23254	Aramark	NJ	Naomi Graves	11/30/2017	5/10/2019	
22										
23										
24	SUM of Contract Value is 1,605,610.00									
25										
26	AVG of Contract Value is 89,200.56									
27										
28	There are a total of 18 records in this View									
29										

Tips & Tricks: "Your Contracts"

There are many combinations of Search Criteria that you can play with to create some very detailed and complex reports, but most times, you are using views to narrow down just one or two fields. One of the most frequently used Views, is a "My Contracts" type view. As an Administrator, you can quickly make a View and share it with everyone so that they can all see their assigned contracts without needing to make a view of their own.

- The first field should be set to **Owner (A)**
- The second dropdown should be set to **Equals "=" (B)**
- Then for the text box, you want to make the "name" **@LoggedInUser** (all one word) **(C)**
    - By using this "name" the system reads this view as only showing the Contracts that the **Logged In User** is the **Owner** of.
    - Subsequently, if you Save and Name this View "Your Contracts" and Share it with everyone in your company, the view "Your Contracts" will always show the specific User's contracts.
- If your Company uses Primary, Secondary, and/or Tertiary Parties, you can also include them in your view by clicking **Add Criteria (D)**, making sure the **And/Or** dropdown is set to **OR (E)**, and then following the same steps as above, just making sure to select the correct initial Field **(F)**.
- *(Optional)* Share this View with any or all Users you'd like to, using the previous instructions.

IMPORTANT SECURITY DISCLOSURE: *While this is a great View to Share with your other Users, we **DO NOT** suggest setting this view to send a **Scheduled Report** to **ANYONE** besides yourself. The reasoning is that when the system generates the report to be emailed, it will only generate a report of the **initial creator** of the view. Meaning in a company of 100 employees and 1 Administrator, if the Admin set up this view, shared it with their whole company, and then scheduled a report, all 100 employees will only receive a list of the Admin's contracts, not their own. This potentially could lead to some confidential information being seen by the wrong eyes. Again, it **IS** fine to **SHARE** this View, but **DO NOT** set it on a **Scheduled Report**.*

Tips & Tricks: "My Favorite Views"

This is a less flashy tip than the previous, but one that you'll probably use on a more daily basis, and can save you a few clicks every day.

- From the Home Tab, you may have noticed an area called **My Favorite Views** above your Last Containers Accessed.
- By using the **Add View (A)** button, and using the small pop-up menu to the right **(B)**, you can select any view you have made in your system, regardless of which tab it is under, to be right on your home screen to easily click an access.
- The Views are sorted alphabetically, First by Enterprise Tab Name, and then by View Name
- You can easily **Delete** any Views you no longer need with the red **X (C)**