sCONTRACT
SCM-Reporting

sContract
SCM-Reporting

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symplr Contract

symplr Contract is a user-friendly application that supports the contract management lifecycle. symplr Contract provides increased visibility into contractual obligations, mitigates risk of non-compliance and identifies additional opportunities for cost savings by controlling the contracting process.

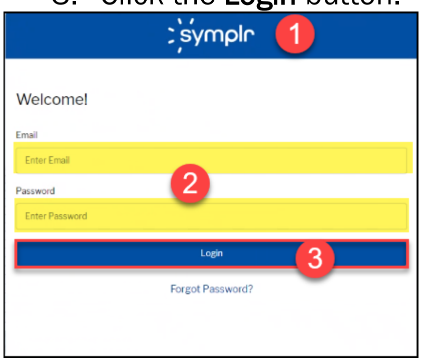
Logging In

To log into symplr Contract, you need an email address and password.

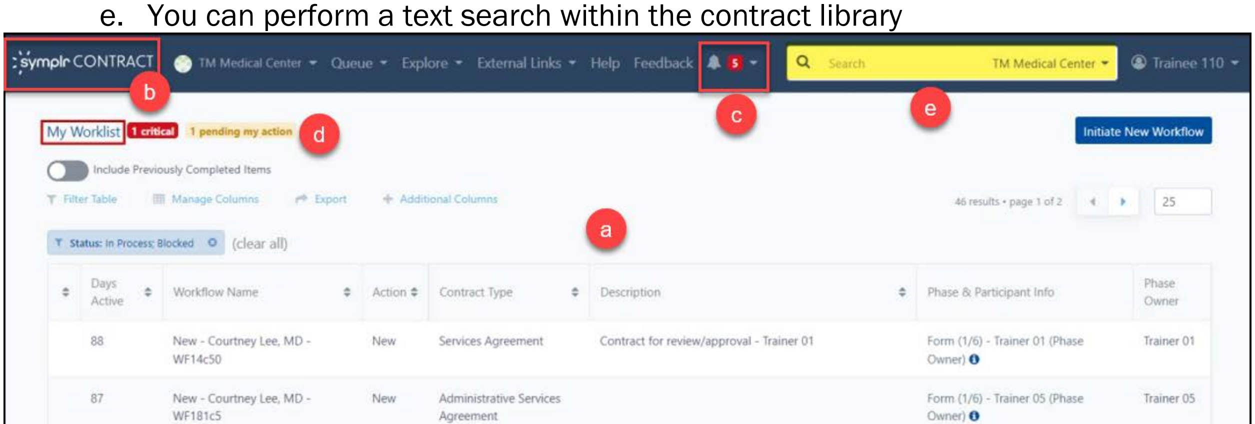
Login Procedure:

Open your browser, and navigate to the tenant using the appropriate URL.

1. The login page displays.
2. Type the **Email** and **Password**.
3. Click the **Login** button.



   a. The **My Worklist** page displays. It houses the contract library.
   b. The **symplr Contract** logo at the top, left functions as the home button.
   c. The **bell** icon lights up red with the number of new notifications.
   d. Any pending actions will be displayed in yellow.
   e. You can perform a text search within the contract library

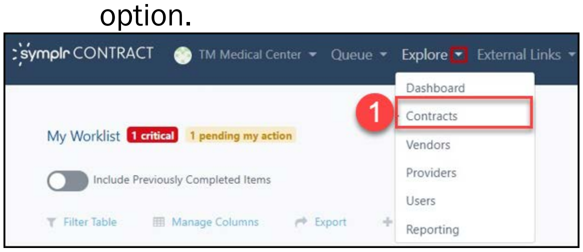


Contract Library

When the **Phase Owner** activates a contract and completes the **Activation** phase for a workflow, symplr Contract pushes the main agreement and associated documentation into the **Contract Library**. The **Contract Library** houses all of the contracts within symplr Contract. You can view contract summary information as well as contract-specific details, based on your user permissions. You can also search for a contract by utilizing filters and search keywords.

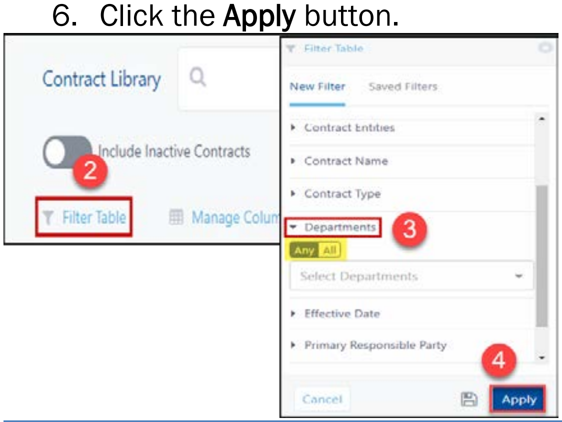
Complete a Contract Search

4. In the top menu bar, hover over the **Explore** dropdown menu option and select the **Contracts** page option.



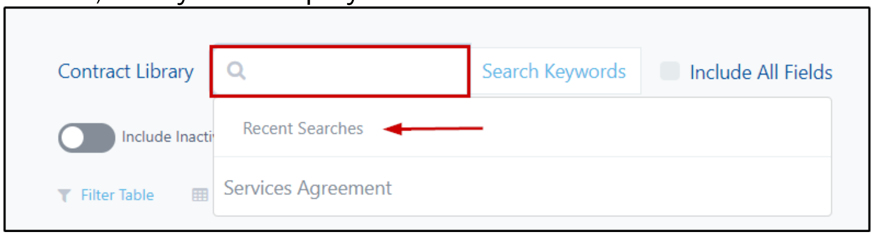
The **Contract Library** page displays. Click the **Filter Table** hyperlink.

5. Define the filter criteria you want.
6. Click the **Apply** button.



Any	All
If you select the Any option, only the results that contain any of the select values or defined criteria display.	If you select the All option, only the results that contain all of the select values or defined criteria display

You may also perform a search using keywords in the **Search Keywords** field. When you perform a keyword search, the system displays all contracts that match the search criteria.

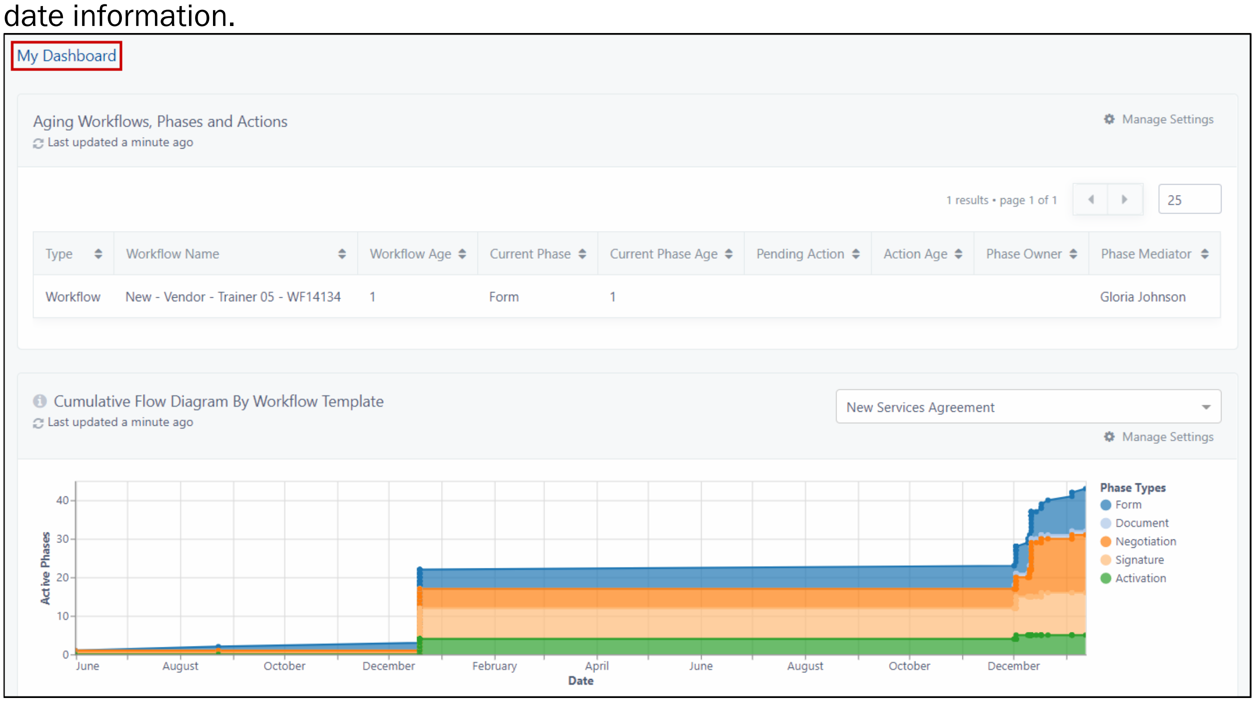


Reporting

Reporting allows you to view workflow and contract data that may require your attention. You can perform reporting features utilizing the **My Dashboard** and **Reporting** pages.

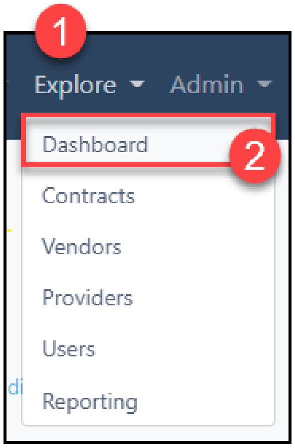
My Dashboard

The **My Dashboard** page displays the most up-to-date workflow information. The dashboard utilizes interactive widgets to help you refocus your attention within the application. All widgets update automatically and display the time stamp of the last data update, to ensure you're viewing the most up-to-date information.



To access the **My Dashboard** page:

1. Hover over the **Explore** dropdown menu option
2. Select the **Dashboard** page option.



You can view information in the following widgets.

• Aging Workflows, Phases and Actions	• Cumulative Flow Diagram by Workflow Template
• Workflows in Progress	• Your Critical Dates

Aging Workflows, Phases and Actions

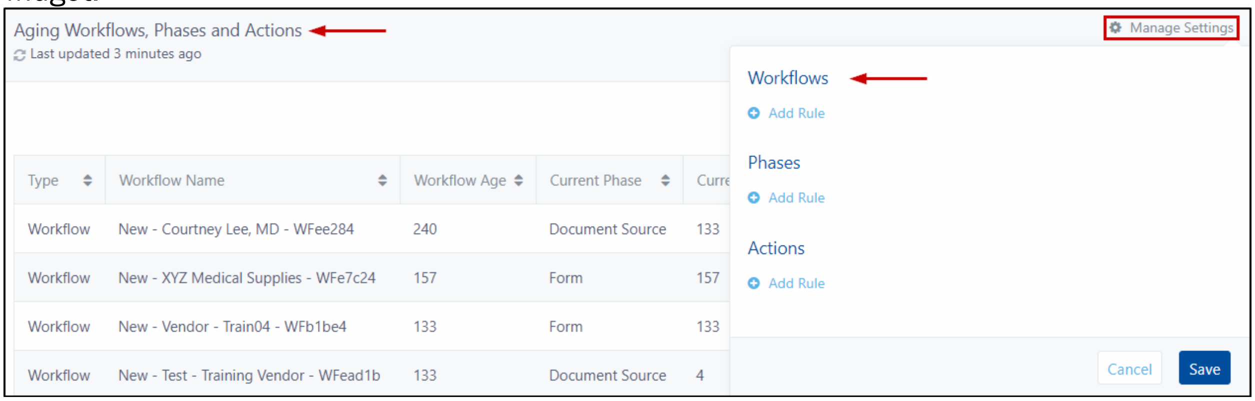
Phase Owners ONLY: The **Aging Workflows, Phases and Actions** widget allows you to quickly view workflows that require your attention. It displays a high-level summary of the next steps that you need to take as a user in order to move the workflow(s) forward in the process.

Aging Workflows, Phases and Actions
Last updated 3 minutes ago
Manage Settings

88 results • page 1 of 4 | 25

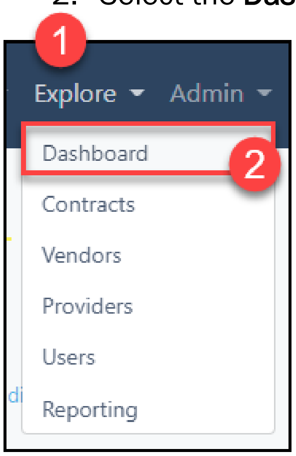
Type	Workflow Name	Workflow Age	Current Phase	Current Phase Age	Pending Action	Action Age	Phase Owner	Phase Mediator
Workflow	New - Courtney Lee, MD - WFee284	591	Document Source	484			Trainer 04	
Workflow	New - Test - Training Provider - WF52c54	591	Document Source	591			Trainer 04	
Workflow	New - Test - Training Vendor - WF6f01f	591	Signature	591			Trainer 04	
Workflow	New - XYZ Medical Supplies - WF75d80	591	Activation	591			Trainer 04	
Workflow	New - ER Ambulance Services - WF79f52	591	Review	591			Trainer 04	
Workflow	New - Test - Training Vendor - WF40adb	553	Review	553			Trainer 04	
Workflow	New - Test - Training Vendor - WFcfc9f	553	Review	553			Trainer 04	

You can also click the **Manage Settings** icon to define rules that drive the information that displays in the widget.



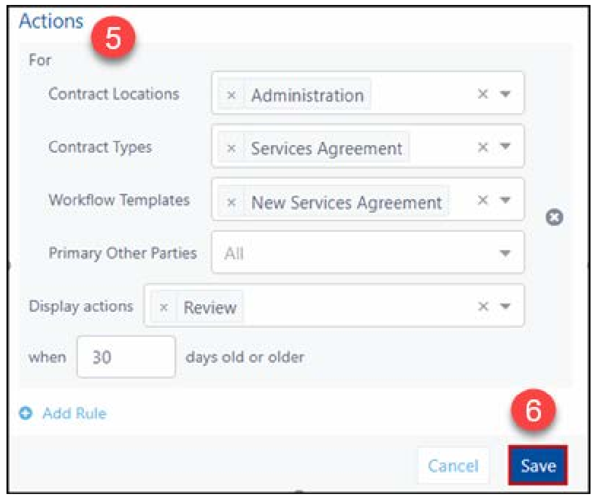
Add a rule to the **Aging Workflows, Phases and Actions Widget** procedure:

1. In the top menu bar, hover over the **Explore** dropdown menu option.
2. Select the **Dashboard** page option.



3. Click the **Manage Settings** icon. When the **My Dashboard page** displays, locate the **Workflows, Phases and Actions** widget.

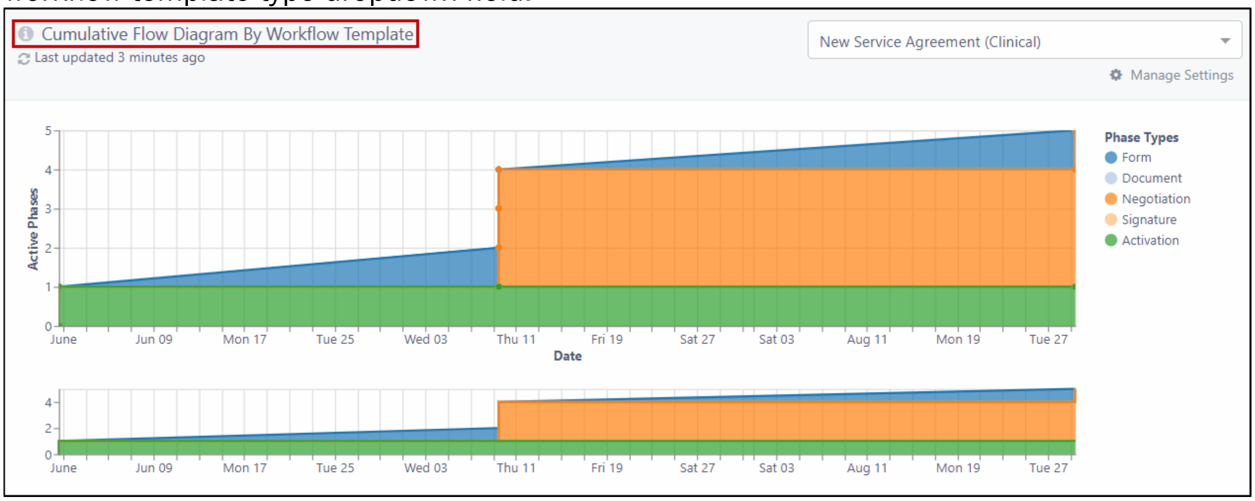
4. In the desired section, click the **+ Add Rule** icon. You can add rules for **workflows**, **phases** or **actions**.
5. Enter information in the fields, as required.
   - The fields that display may differ for each section.
6. Click **Save**.



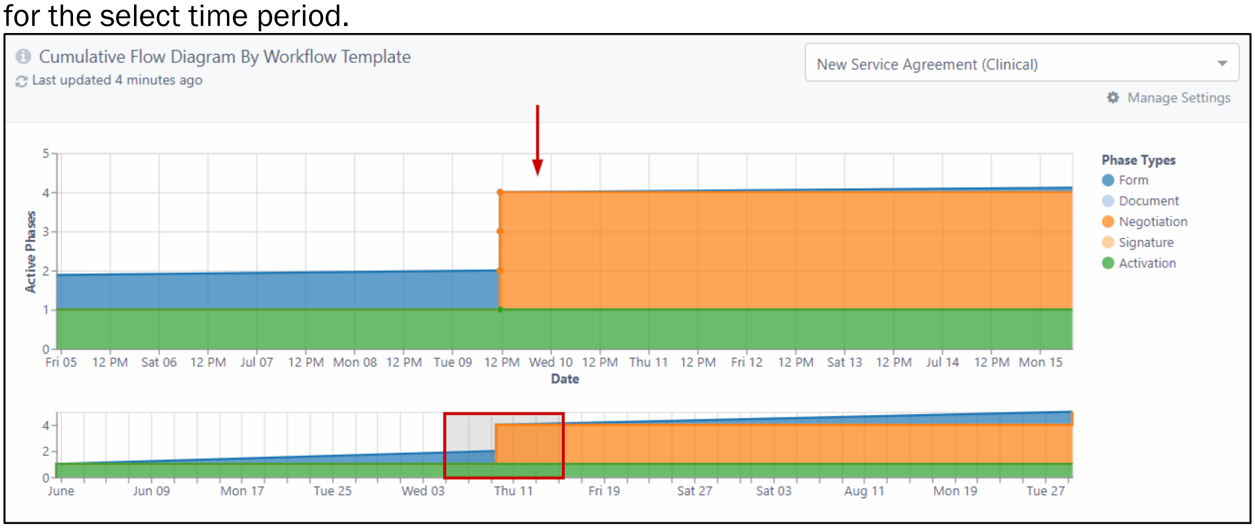
Field	Definition
Contract Locations	Select the physical location(s) that associate(s) with the contract.
Contract Types	Select the type of agreement.
Workflow Templates	Select the template that associates with the selected contract type and location of agreement.
Primary Other Parties	Select the vendor or provider that primarily associates to the workflow.
Display Actions	Select the action type that associates to the workflow. **Note:** This field may differ depending on which section you're adding the rule to.
When X Days Old or Older	Type the number of days.

Cumulative Flow Diagram by Workflow Template

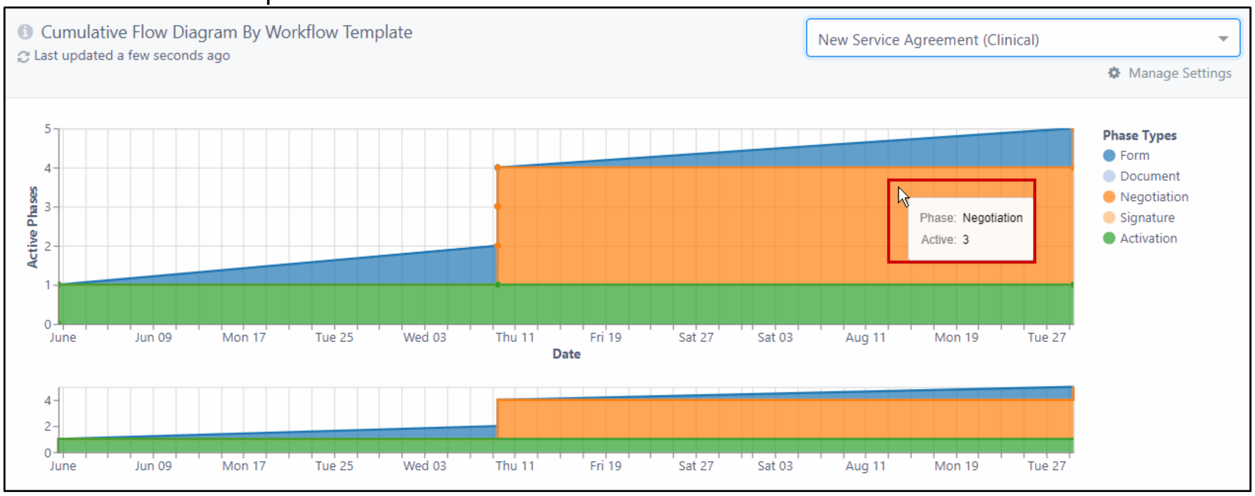
The **Cumulative Flow Diagram by Workflow Template** widget displays a cumulative view of all workflows by workflow template type. It displays the total number of workflows by phase over time. Each workflow template type may have different phases. You can select the workflow template type by clicking the workflow template type dropdown field.



If you select a period of time in the bottom graph, the top graph displays a closer view of the data captured for the select time period.

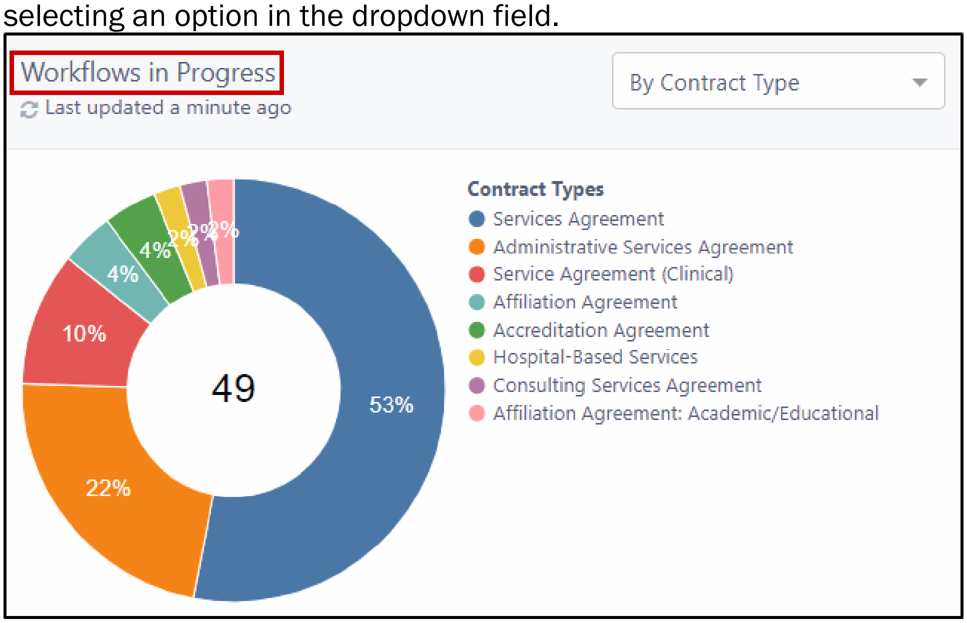


If you hover over a data point in the graph, you can view the phase type as well as how many workflows are active in the select phase.



Workflows in Progress

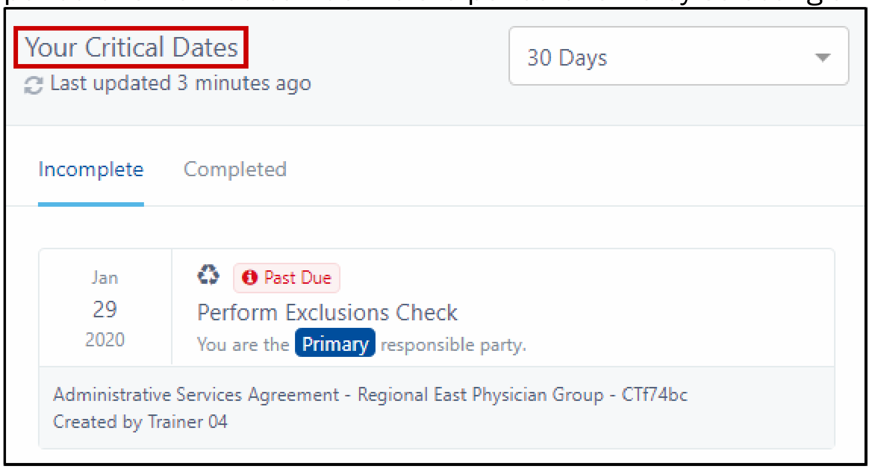
The **Workflows In Progress** widget provides a snapshot of all the workflows that are actively in progress by workflow template type, contract type or workflow phase. You can filter the workflows in progress by selecting an option in the dropdown field.



If you select a bar in the pie graph, the application navigates you to the **My Worklist** page with the appropriate filters automatically applied.

Your Critical Dates

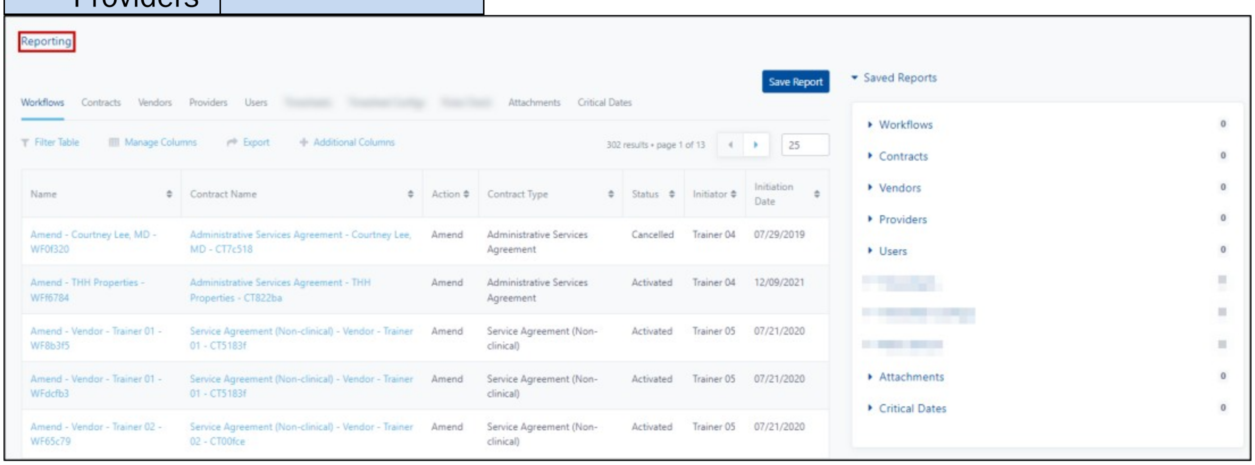
The **Your Critical Dates** widget displays notifications for all critical dates for which you're a responsible party on the contract. The widget displays critical dates that are incomplete and complete for the defined period of time. You can define the period of time by selecting an option in the dropdown field.



Reporting Page

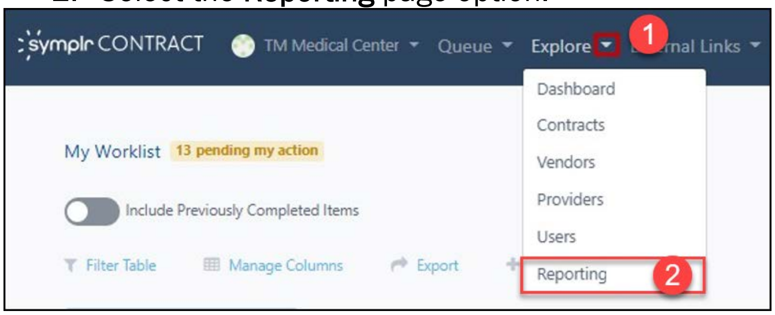
The **Reporting** page allows you to create, run and schedule reports utilizing filters. Based on user permissions, you can create run reports in the following tabs:

Workflows	Users
Contracts	Attachments
Vendors	Critical Dates
Providers	



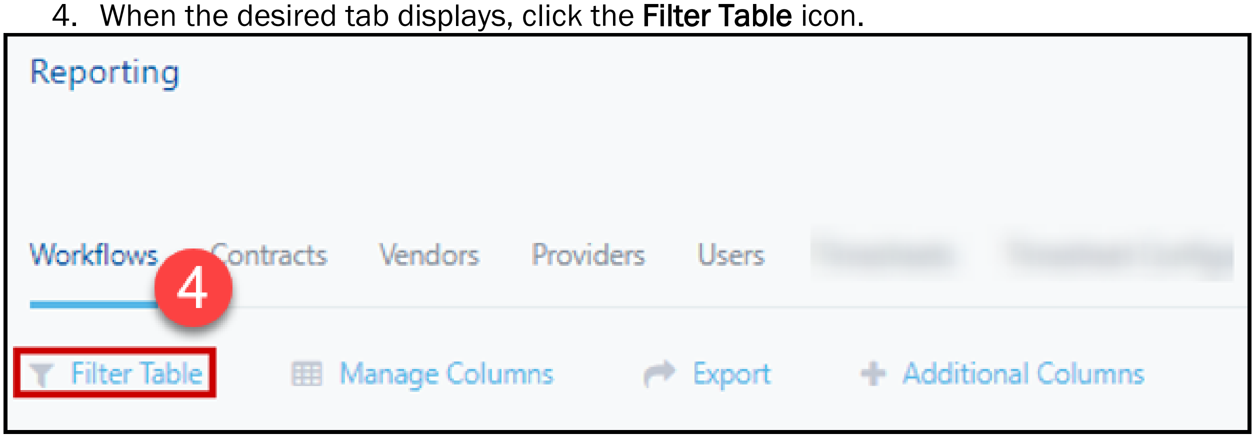
How to Run a Report

1. In the top menu bar, hover over the **Explore** dropdown menu option.
2. Select the **Reporting** page option.

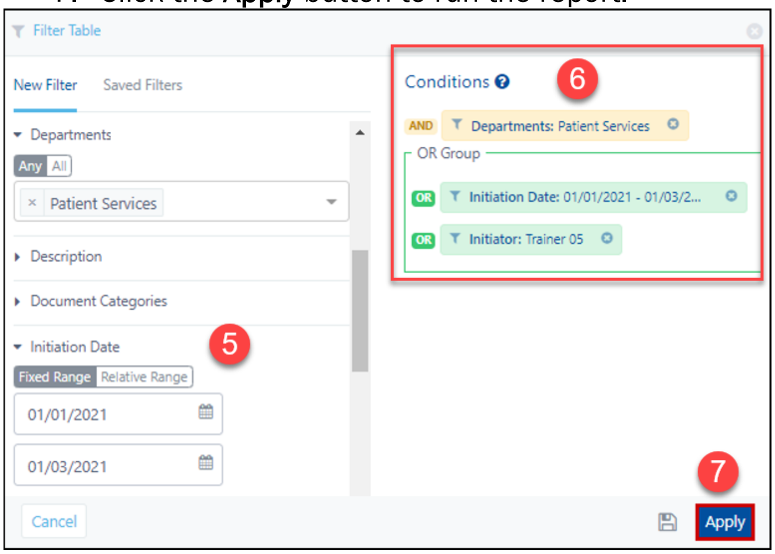


3. When the **Reporting** page displays, select the tab in which you want to run a report.

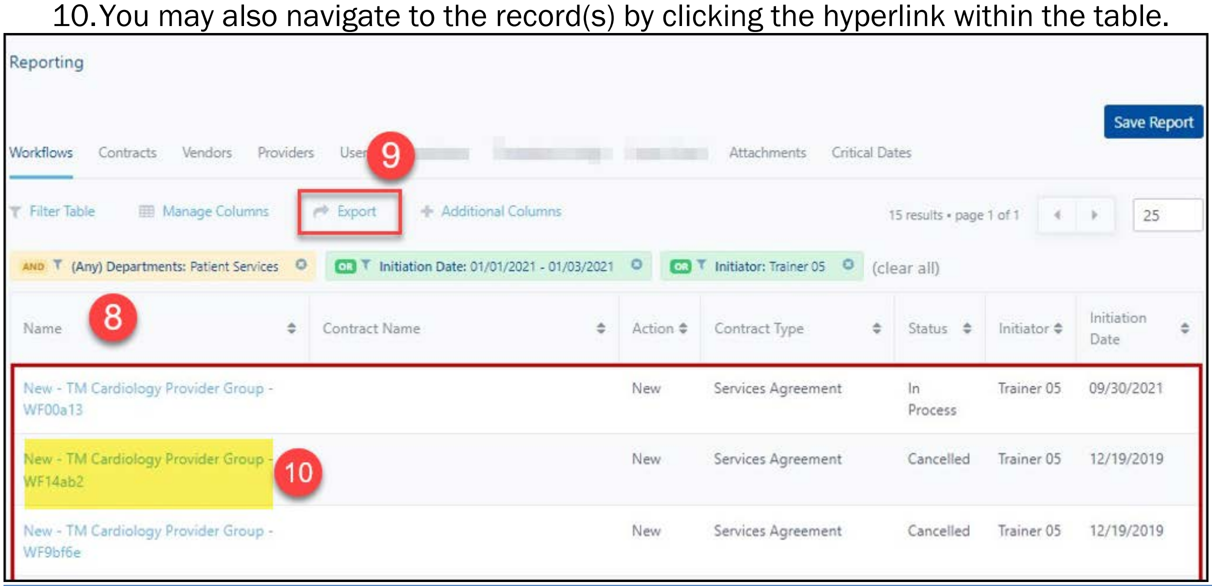
4. When the desired tab displays, click the **Filter Table** icon.



5. Select and define the filter criteria you want to apply.
6. The filter(s) display under the **Conditions** section with the report filtering logic.
   - You may choose to change the logic to string filters using an "Or" logic by clicking the **AND** operator located on the left of the filter.
   - To remove the filter, click the **X** button to the right of each filter.
7. Click the **Apply** button to run the report.

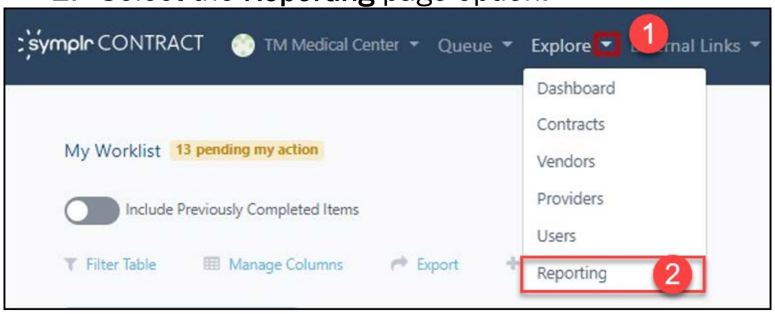


8. The **Reporting** page runs the report and displays the results that match the defined report filter criteria.
9. You can also export the report results using the **Export** feature.
10. You may also navigate to the record(s) by clicking the hyperlink within the table.



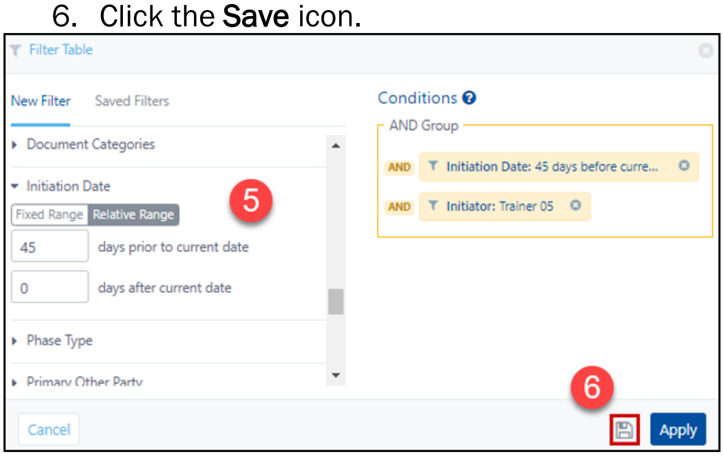
Save a Report

1. In the top menu bar, hover over the **Explore** dropdown menu option.
2. Select the **Reporting** page option.

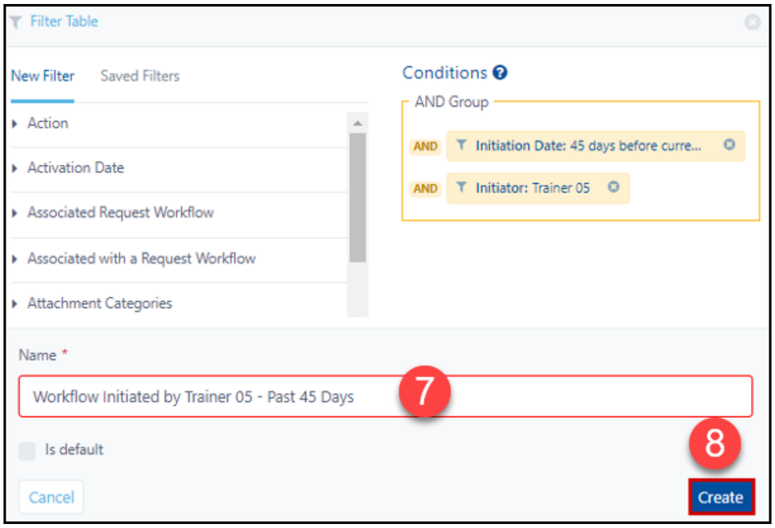


3. When the **Reporting** page displays, select the tab in which you want to save a report.
4. When the desired tab displays, click the **Filter Table** icon.

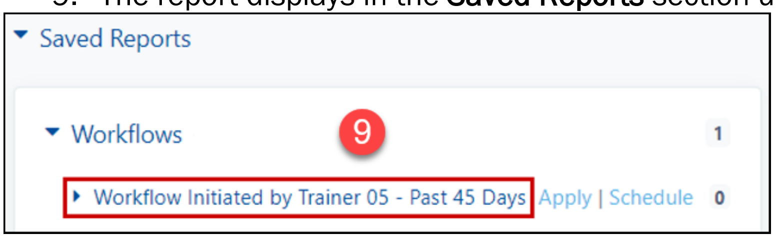
5. Select and define the filter criteria you want to apply.
6. Click the **Save** icon.



7. Define the report **Name**.
8. Click the **Create** button.

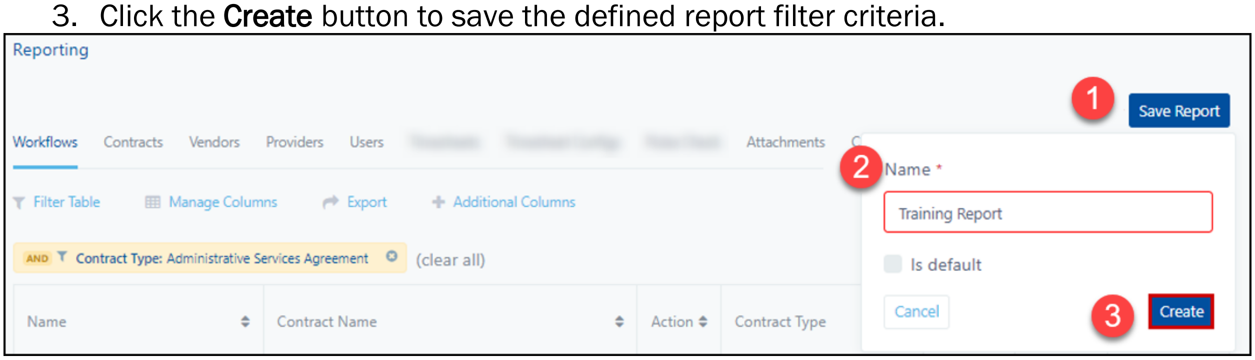


9. The report displays in the **Saved Reports** section under the appropriate tab header title.



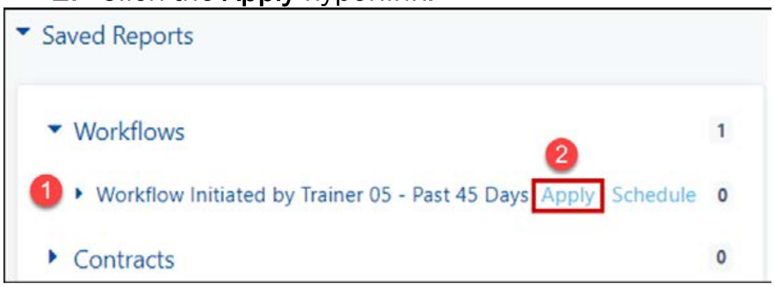
Save a Report After Running It

1. After you run a report, click the **Save Report** button.
2. Enter the **Name**.
3. Click the **Create** button to save the defined report filter criteria.

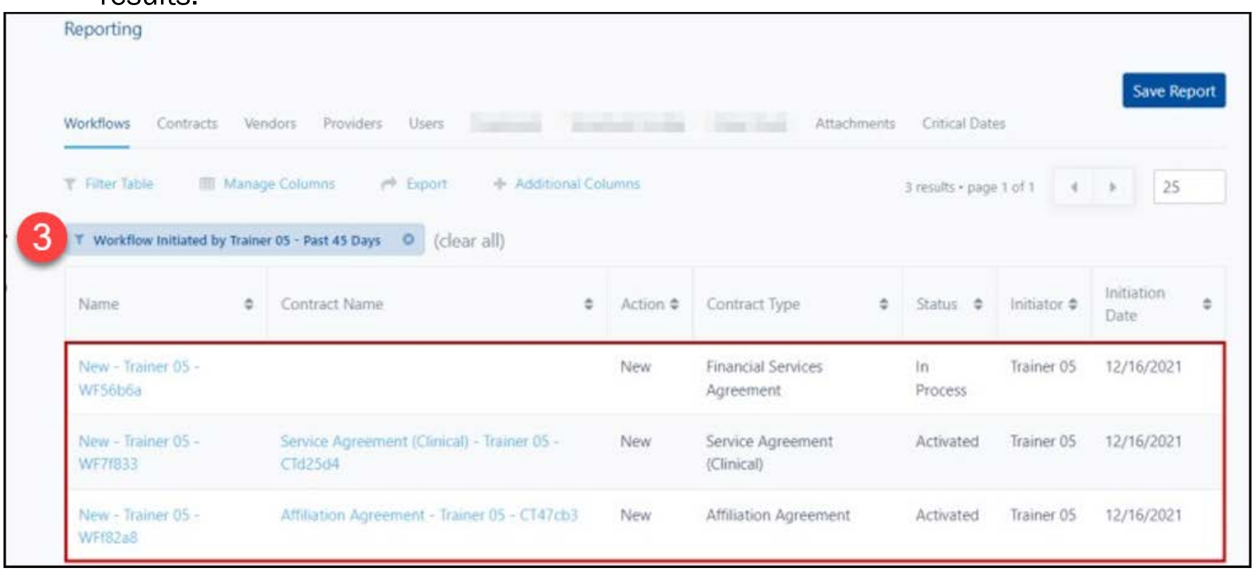


Run a Saved Report

1. Locate the report name under the **Saved Reports** section.
2. Click the **Apply** hyperlink.



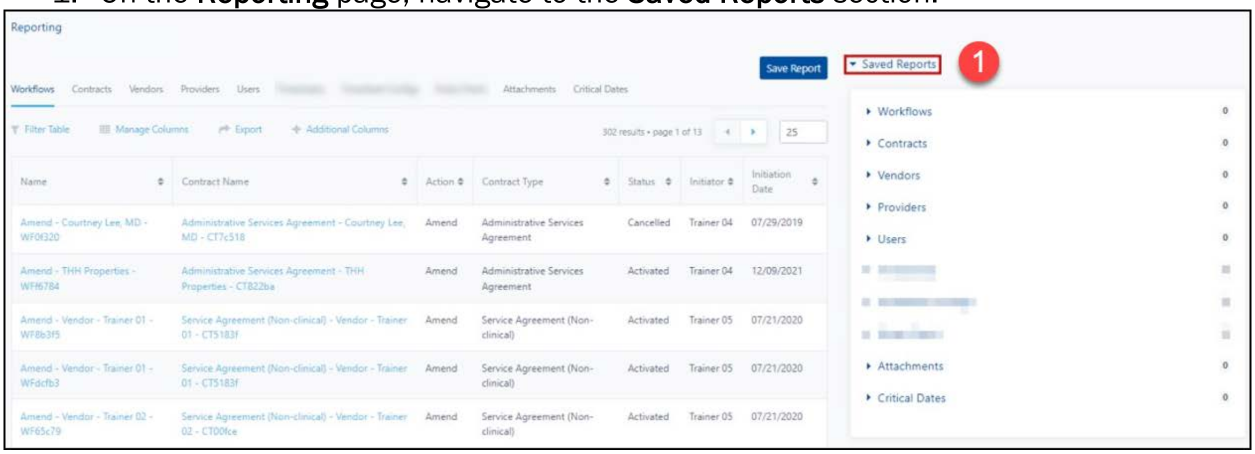
3. The application automatically applies the saved filters to the appropriate tab and displays report results.



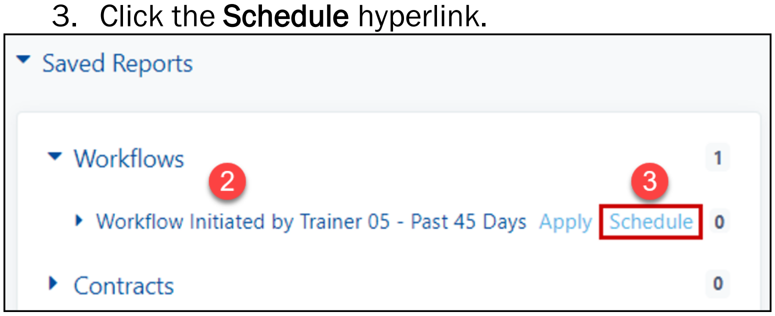
Schedule a Report

In addition to running and saving reports, you can schedule a report. When you schedule a report, symplr Contract runs the report and delivers the report results in an export file through email. The email contains the report as a downloadable attachment. Because symplr Contract delivers report results through email, you may not be able to view the associated records in symplr Contract, based on your permissions. To schedule a report:

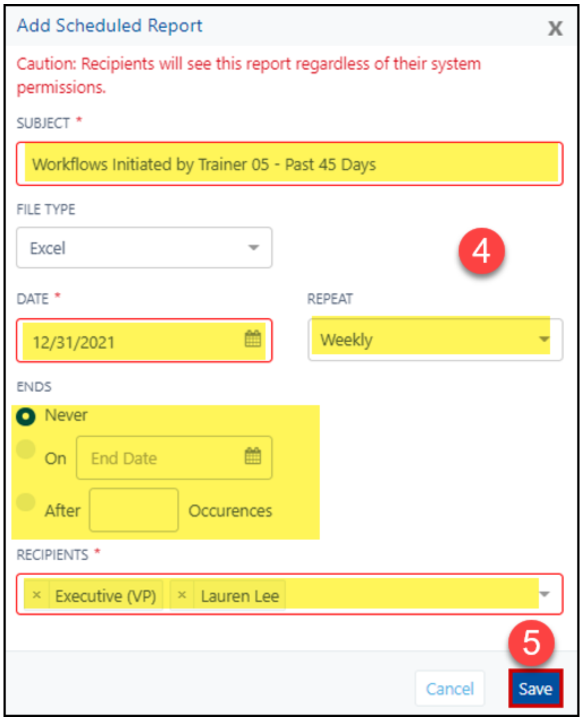
1. On the **Reporting** page, navigate to the **Saved Reports** section.



2. Locate the report name under the appropriate tab header title.
3. Click the **Schedule** hyperlink.



4. In the **Add Scheduled Report** dialog box, enter information in the following fields, as required.
5. Click the **Save** button.

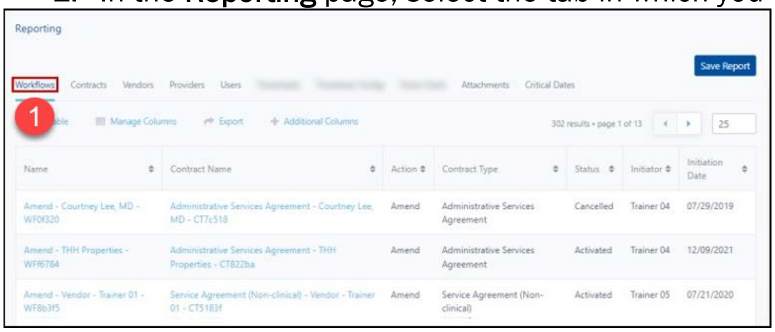


6. The scheduled report displays in the **Saved Reports** section.

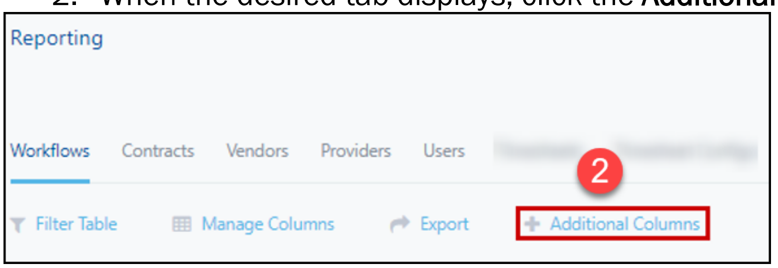
Add Custom Form Fields to Existing Report

In addition to scheduling reports, you can also report on custom form fields in the **Reporting** page. You can include additional custom fields to the existing report columns in the report tabs. Depending on your permissions, you can run, save and schedule reports on all custom form fields. Although you're able to review report details in the report attachment, you may not be able to view the associated records in symplr Contract, based on your permissions.

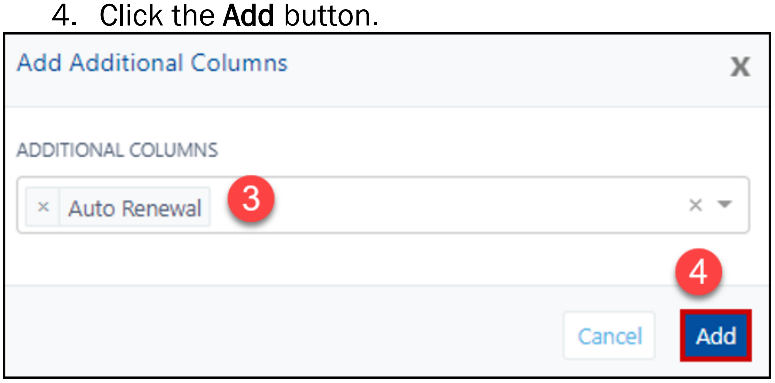
1. In the **Reporting** page, select the tab in which you want to add the additional column(s).



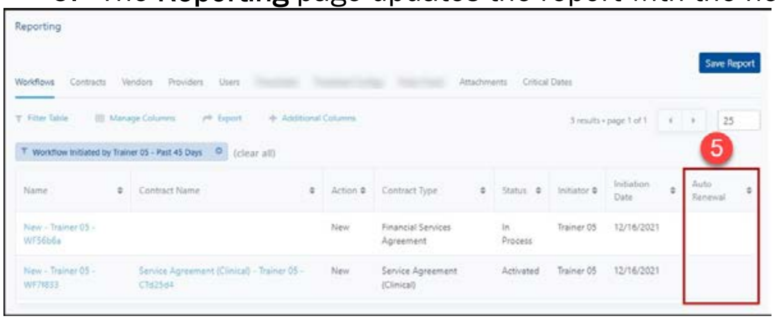
2. When the desired tab displays, click the **Additional Columns** icon.



3. In the **Add Additional Columns** dialog box, select the additional columns you want to include in the report.
4. Click the **Add** button.



5. The **Reporting** page updates the report with the newly added column(s).



6. When you add additional custom form fields or columns to the report, the column name displays in the **Manage Columns** list.