

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.

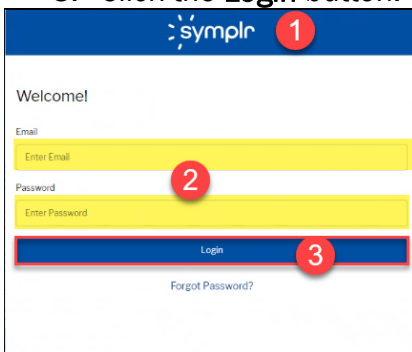
Logging In

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

Login Procedure:

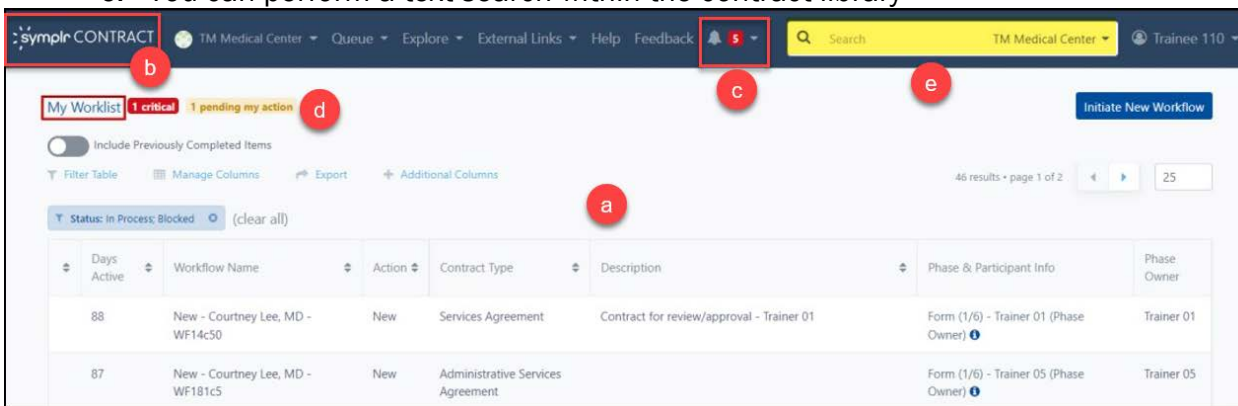
Open your browser, and navigate to the tenant using the appropriate URL.

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



The screenshot shows the symplr login page. At the top left is the symplr logo with a red circle containing the number 1. Below the logo is a 'Welcome!' message. There are two input fields: 'Email' with a yellow background and a red circle containing the number 2, and 'Password' with a yellow background and a red circle containing the number 2. Below these fields is a blue 'Login' button with a red circle containing the number 3. At the bottom, there is a link for 'Forgot Password?'.

- 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



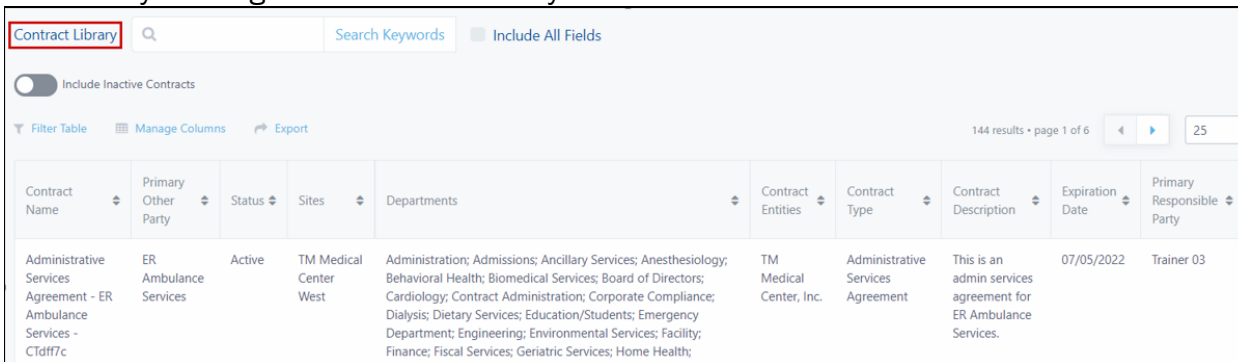
The screenshot shows the 'My Worklist' page in symplr Contract. At the top left is the symplr CONTRACT logo with a red circle containing the letter 'b'. To its right is a navigation menu with 'TM Medical Center', 'Queue', 'Explore', 'External Links', 'Help', and 'Feedback'. A red circle containing the letter 'c' is over a bell icon with a red notification count. To the right is a search bar with a red circle containing the letter 'e'. Below the navigation is a 'My Worklist' header with a red circle containing the letter 'd' over the text '1 critical 1 pending my action'. There is a toggle for 'Include Previously Completed Items' and a blue 'Initiate New Workflow' button. Below the header is a table with columns: Days Active, Workflow Name, Action, Contract Type, Description, Phase & Participant Info, and Phase Owner. A red circle containing the letter 'a' is over the table. The table has 46 results, page 1 of 2, and 25 items per page.

Days Active	Workflow Name	Action	Contract Type	Description	Phase & Participant Info	Phase Owner
88	New - Courtney Lee, MD - WF14c50	New	Services Agreement	Contract for review/approval - Trainer 01	Form (1/6) - Trainer 01 (Phase Owner)	Trainer 01
87	New - Courtney Lee, MD - WF181c5	New	Administrative Services Agreement		Form (1/6) - Trainer 05 (Phase Owner)	Trainer 05



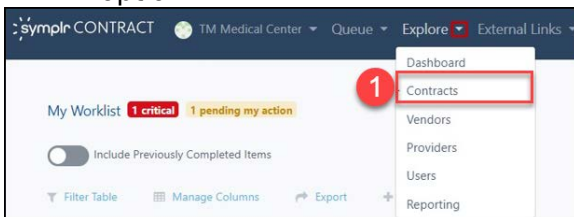
Contract Library

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.



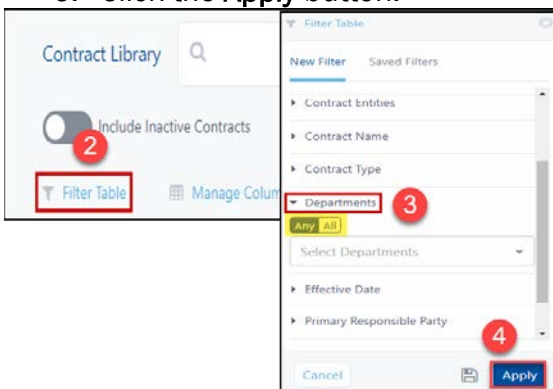
Complete a Contract Search

- 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.

- Define the filter criteria you want.
- Click the **Apply** button.

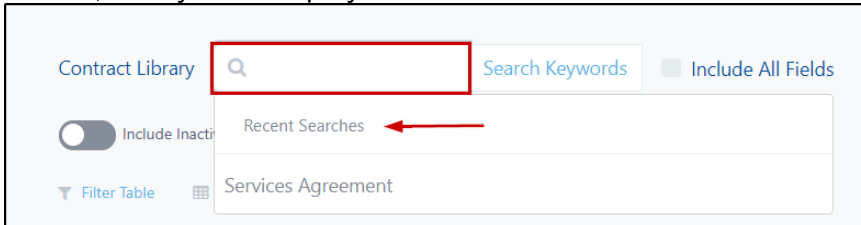


Any	All
If you select the Any option, only the results that contain any of the select values or defined criteria display.	If you select the All option, only the results that contain all of the select values or defined criteria display

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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.

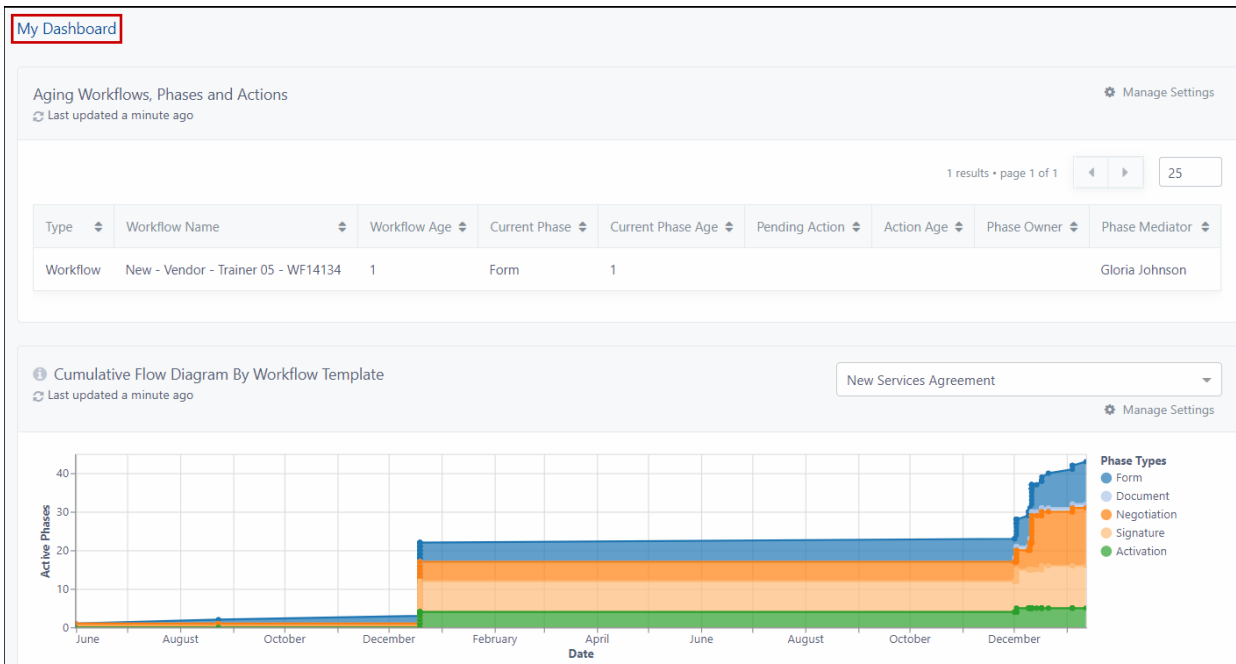


Reporting

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.

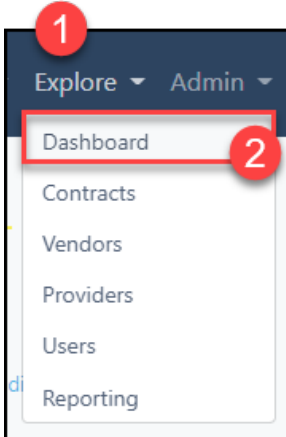


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To access the **My Dashboard** page:

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



You can view information in the following widgets.

<ul style="list-style-type: none">• Aging Workflows, Phases and Actions	<ul style="list-style-type: none">• Cumulative Flow Diagram by Workflow Template
<ul style="list-style-type: none">• Workflows in Progress	<ul style="list-style-type: none">• 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.

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	

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

The screenshot shows the 'Aging Workflows, Phases and Actions' widget. The widget title is 'Aging Workflows, Phases and Actions' with a red arrow pointing to it. Below the title is a table with columns: Type, Workflow Name, Workflow Age, Current Phase, and Current Phase Age. The table contains four rows of workflow data. To the right, the 'Manage Settings' dialog is open, showing sections for 'Workflows', 'Phases', and 'Actions', each with an 'Add Rule' button. A red arrow points to the 'Workflows' section. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

Type	Workflow Name	Workflow Age	Current Phase	Current Phase Age
Workflow	New - Courtney Lee, MD - WFee284	240	Document Source	133
Workflow	New - XYZ Medical Supplies - WFe7c24	157	Form	157
Workflow	New - Vendor - Train04 - WFb1be4	133	Form	133
Workflow	New - Test - Training Vendor - WFead1b	133	Document Source	4

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.

The screenshot shows the top menu bar with 'Explore' and 'Admin' dropdown menus. The 'Explore' dropdown menu is open, showing options: Dashboard, Contracts, Vendors, Providers, Users, and Reporting. A red circle with the number '1' is next to the 'Explore' menu, and a red circle with the number '2' is next to the 'Dashboard' option.

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

The screenshot shows the 'My Dashboard' page. The widget title is 'Aging Workflows, Phases and Actions' with a red arrow pointing to it. Below the title is a table with columns: Type, Workflow Name, Workflow Age, Current Phase, Current Phase Age, Pending Action, Action Age, Phase Owner, and Phase Mediator. The table contains one row of workflow data. To the right of the table is a 'Manage Settings' icon with a red circle and the number '3' next to it.

Type	Workflow Name	Workflow Age	Current Phase	Current Phase Age	Pending Action	Action Age	Phase Owner	Phase Mediator
Workflow	New - Test - Training Provider - WF52c54	591	Document Source	591			Trainer 04	

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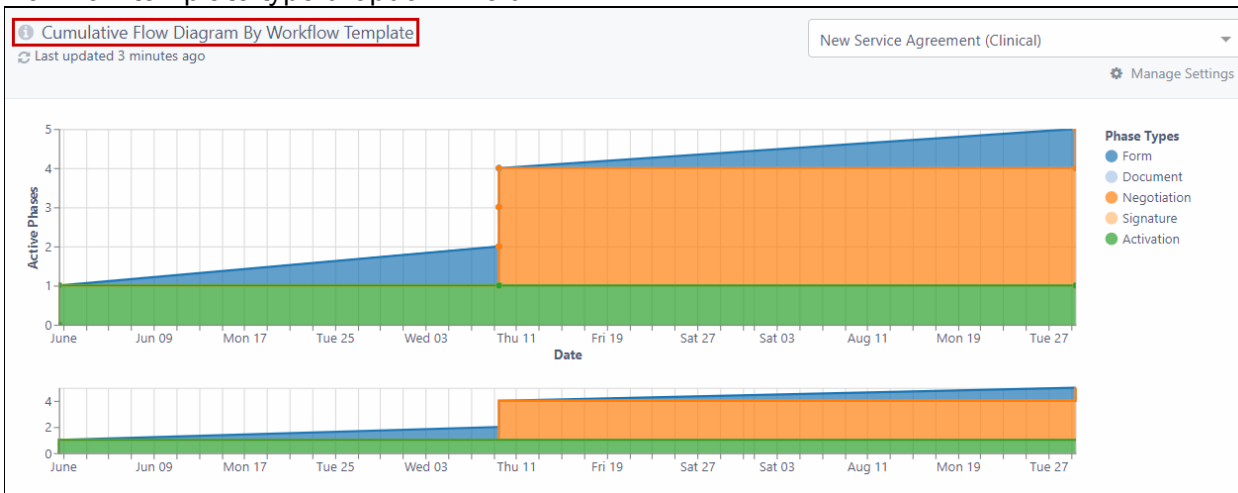
4. In the desired section, click the **+ Add Rule** icon. You can add rules for **workflows, phases or actions**.
5. Enter information in the fields, as required.
 - o The fields that display may differ for each section.
6. Click **Save**.

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.

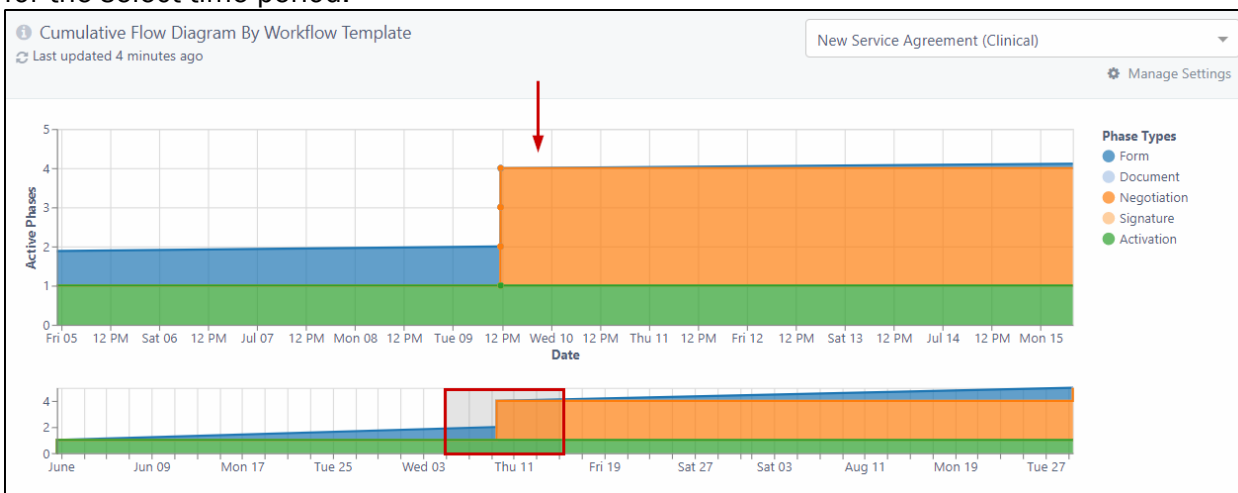


Cumulative Flow Diagram by Workflow Template

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.



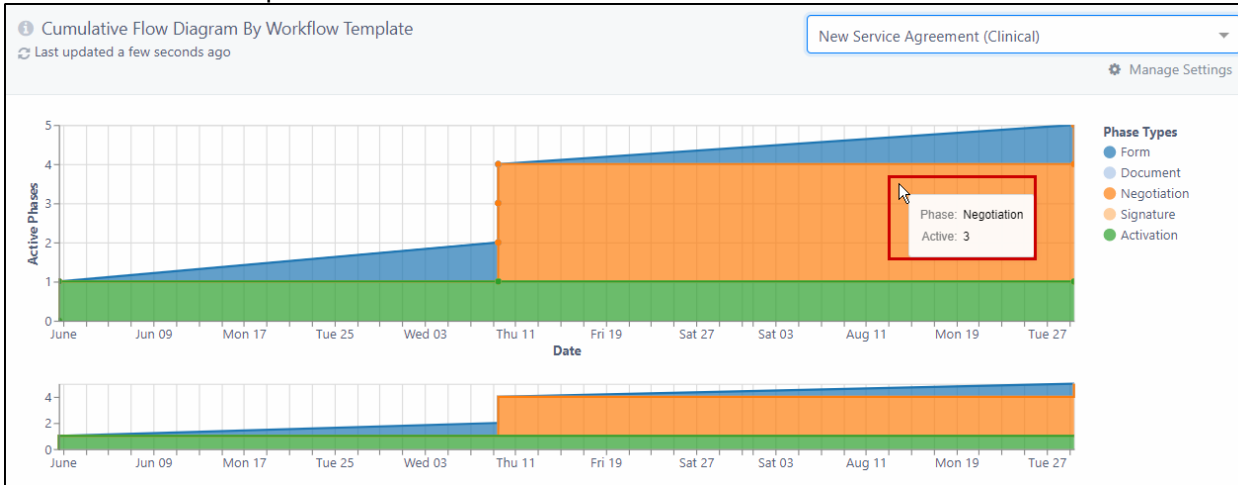
If you select a period of time in the bottom graph, the top graph displays a closer view of the data captured for the select time period.



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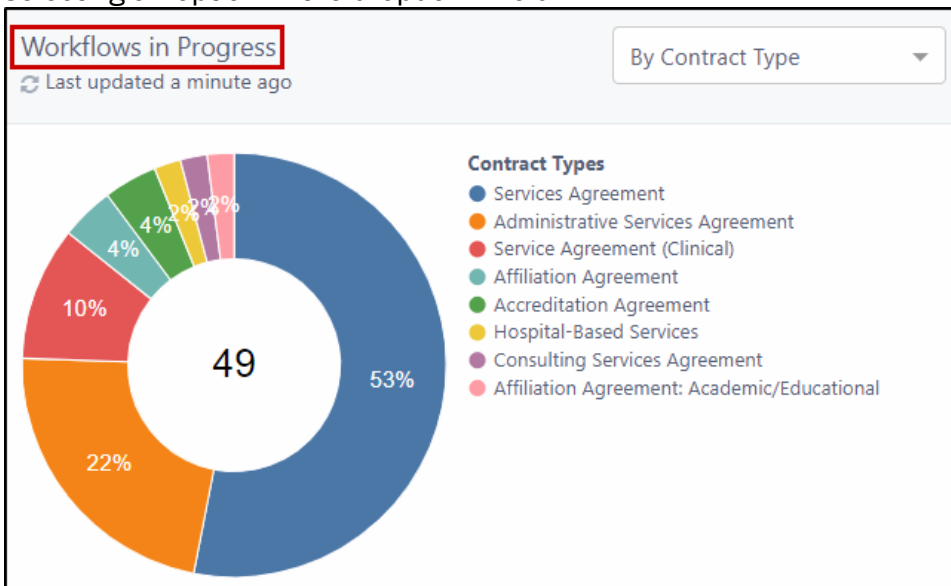


If you hover over a data point in the graph, you can view the phase type as well as how many workflows are active in the select phase.



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.

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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

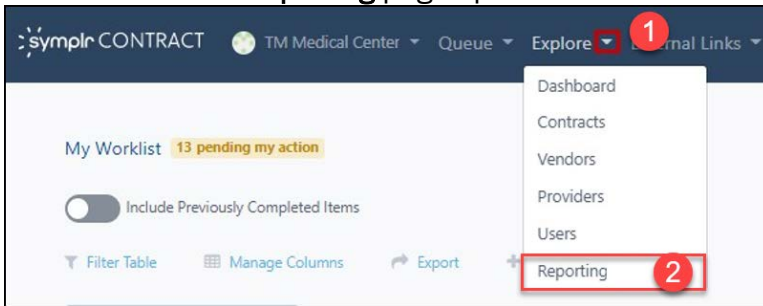
The **Reporting** page allows you to create, run and schedule reports utilizing filters. Based on user permissions, you can create run reports in the following tabs:

Workflows	Users
Contracts	Attachments
Vendors	Critical Dates
Providers	

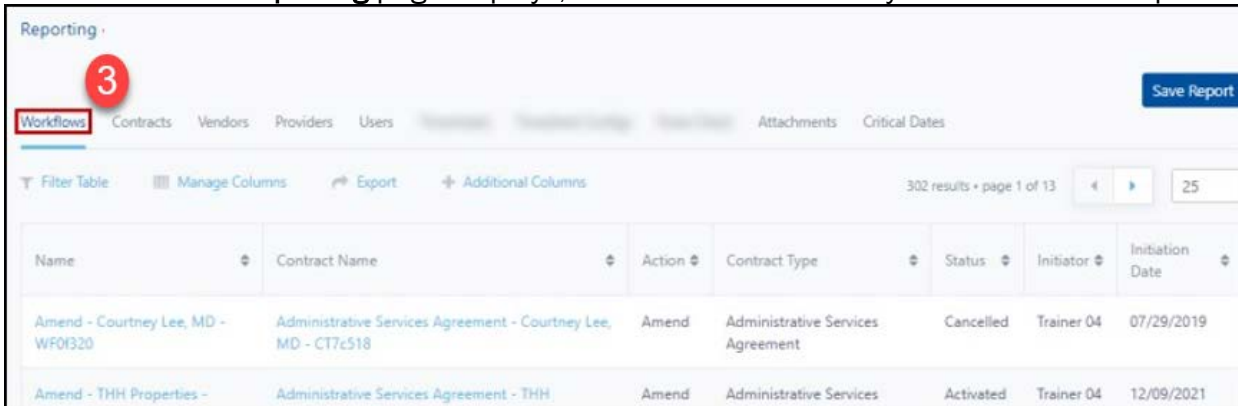
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How to Run a Report

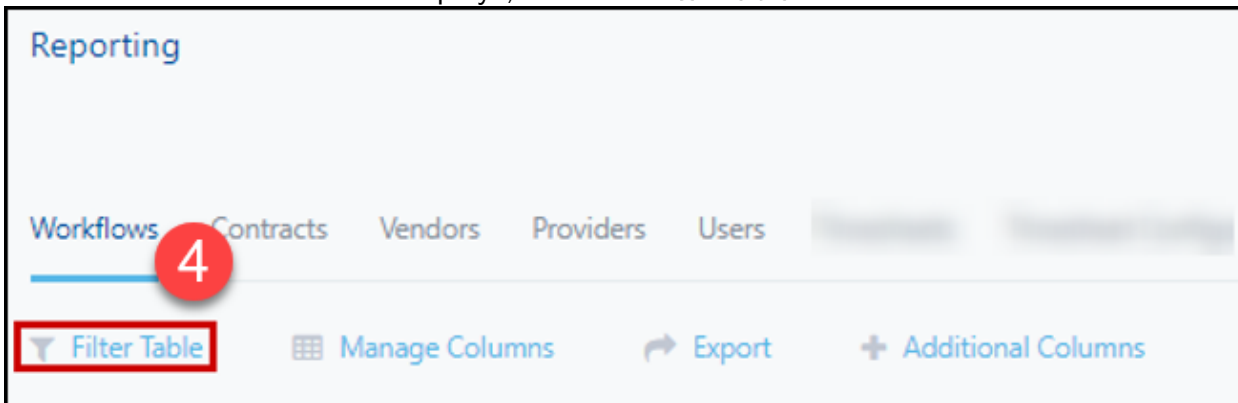
1. In the top menu bar, hover over the **Explore** dropdown menu option.
2. Select the **Reporting** page option.



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.



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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.
 - o 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.
 - o To remove the filter, click the **X** button to the right of each filter.
7. Click the **Apply** button to run the report.

The screenshot shows the 'Filter Table' interface. On the left, there are sections for 'New Filter' and 'Saved Filters'. Under 'New Filter', there are sections for 'Departments', 'Description', 'Document Categories', and 'Initiation Date'. The 'Initiation Date' section is highlighted with a red circle '5'. It shows a 'Fixed Range' selection with two date pickers set to '01/01/2021' and '01/03/2021'. On the right, the 'Conditions' section is highlighted with a red box and a red circle '6'. It shows a filter logic tree: 'AND' followed by 'Departments: Patient Services', an 'OR Group' containing 'Initiation Date: 01/01/2021 - 01/03/2021' and 'Initiator: Trainer 05'. At the bottom right, there is an 'Apply' button highlighted with a red box and a red circle '7'.

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.

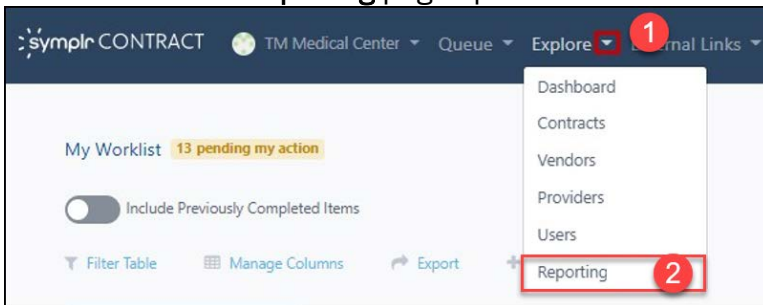
The screenshot shows the 'Reporting' page. At the top, there are tabs for 'Workflows', 'Contracts', 'Vendors', 'Providers', 'Users', 'Attachments', and 'Critical Dates'. A 'Save Report' button is in the top right. Below the tabs, there is a 'Filter Table' section with 'Manage Columns' and 'Export' buttons. The 'Export' button is highlighted with a red box and a red circle '9'. Below the filter table, there are filter criteria: 'AND (Any) Departments: Patient Services', 'OR Initiation Date: 01/01/2021 - 01/03/2021', and 'OR Initiator: Trainer 05'. Below the filter criteria, there is a table with columns: Name, Contract Name, Action, Contract Type, Status, Initiator, and Initiation Date. The first row is highlighted with a red box and a red circle '8'. The second row is highlighted with a yellow background and a red circle '10'. The table contains three rows of data.

Name	Contract Name	Action	Contract Type	Status	Initiator	Initiation Date
New - TM Cardiology Provider Group - WF00a13		New	Services Agreement	In Process	Trainer 05	09/30/2021
New - TM Cardiology Provider Group - WF14ab2		New	Services Agreement	Cancelled	Trainer 05	12/19/2019
New - TM Cardiology Provider Group - WF9bf6e		New	Services Agreement	Cancelled	Trainer 05	12/19/2019

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Save a Report

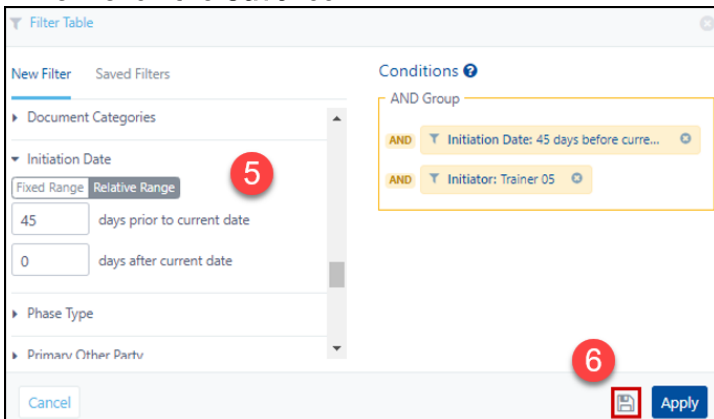
1. In the top menu bar, hover over the **Explore** dropdown menu option.
2. Select the **Reporting** page option.



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.



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

Filter Table

New Filter | Saved Filters

Conditions

AND Group

- AND Initiation Date: 45 days before current date
- AND Initiator: Trainer 05

Name *

Workflow Initiated by Trainer 05 - Past 45 Days

Is default

Cancel | Create

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

Saved Reports

Workflows

Workflow Initiated by Trainer 05 - Past 45 Days | Apply | Schedule 0

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.

Reporting

Workflows | Contracts | Vendors | Providers | Users | Attachments

Filter Table | Manage Columns | Export | Additional Columns

AND Contract Type: Administrative Services Agreement (clear all)

Name | Contract Name | Action | Contract Type

Save Report

Name *

Training Report

Is default

Cancel | Create

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Run a Saved Report

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

▼ Saved Reports

- ▼ Workflows 1
- 1 ▶ Workflow Initiated by Trainer 05 - Past 45 Days **Apply** Schedule 0
- ▶ Contracts 0

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

Reporting

Workflows Contracts Vendors Providers Users Attachments Critical Dates [Save Report](#)

Filter Table Manage Columns Export Additional Columns 3 results - page 1 of 1 25

3 Workflow Initiated by Trainer 05 - Past 45 Days (clear all)

Name	Contract Name	Action	Contract Type	Status	Initiator	Initiation Date
New - Trainer 05 - WF56b6a		New	Financial Services Agreement	In Process	Trainer 05	12/16/2021
New - Trainer 05 - WF7f833	Service Agreement (Clinical) - Trainer 05 - CTd25d4	New	Service Agreement (Clinical)	Activated	Trainer 05	12/16/2021
New - Trainer 05 - WFf82a8	Affiliation Agreement - Trainer 05 - CT47cb3	New	Affiliation Agreement	Activated	Trainer 05	12/16/2021

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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.

The screenshot shows the Reporting page interface. At the top right, there is a 'Save Report' button and a dropdown menu with 'Saved Reports' selected, indicated by a red circle with the number 1. Below this is a table with columns: Name, Contract Name, Action, Contract Type, Status, Initiator, and Initiation Date. The table contains several rows of report data. On the right side, there is a sidebar with a tree view containing 'Workflows', 'Contracts', 'Vendors', 'Providers', 'Users', 'Attachments', and 'Critical Dates'. The 'Saved Reports' dropdown is highlighted with a red circle and the number 1.

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

The screenshot shows the 'Saved Reports' section. Under the 'Workflows' tab, there is a report titled 'Workflow Initiated by Trainer 05 - Past 45 Days'. The 'Workflows' tab is highlighted with a red circle and the number 2. The 'Schedule' button next to the report title is highlighted with a red circle and the number 3. The 'Apply' button is also visible next to the report title.

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

Add Scheduled Report [X]

Caution: Recipients will see this report regardless of their system permissions.

SUBJECT *

Workflows Initiated by Trainer 05 - Past 45 Days

FILE TYPE

Excel

DATE *

12/31/2021

REPEAT

Weekly

ENDS

Never

On

After

RECIPIENTS *

Executive (VP) Lauren Lee

Cancel Save

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

▼ Saved Reports

▼ Workflows 1

▼ Workflow Initiated by Trainer 05 - Past 45 Days Apply | Schedule 1

Workflows Initiated by Trainer 05 - Past 45 Days 12/31/2021

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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).

Reporting

Workflows Contracts Vendors Providers Users **Workflows** Attachments Critical Dates

1 Manage Columns Export Additional Columns 302 results - page 1 of 13 25

Name	Contract Name	Action	Contract Type	Status	Initiator	Initiation Date
Amend - Courtney Lee, MD - WF09320	Administrative Services Agreement - Courtney Lee, MD - CT76518	Amend	Administrative Services Agreement	Cancelled	Trainer 04	07/29/2019
Amend - THH Properties - WF8784	Administrative Services Agreement - THH Properties - CT8223a	Amend	Administrative Services Agreement	Activated	Trainer 04	12/09/2021
Amend - Vendor - Trainer 01 - WF8b385	Service Agreement (Non-clinical) - Vendor - Trainer 01 - CT5183F	Amend	Service Agreement (Non-clinical)	Activated	Trainer 05	07/21/2020

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

Reporting

Workflows Contracts Vendors Providers Users

Filter Table Manage Columns Export **Additional Columns**

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

Add Additional Columns X

ADDITIONAL COLUMNS

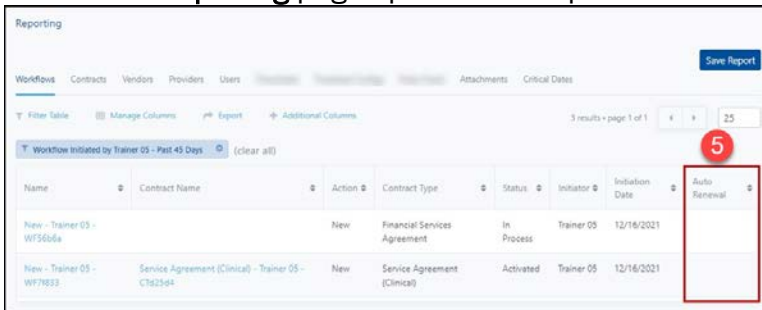
x Auto Renewal 3 x

4

Cancel Add

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



Reporting

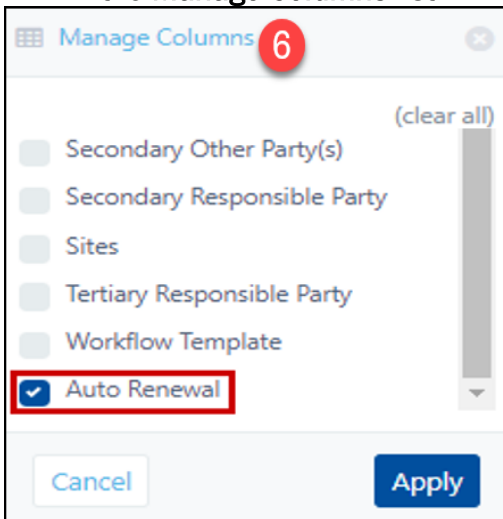
Workflows Contracts Vendors Providers Users **Reporting** Trainers/Trainers Attachments Critical Dates Save Report

Filter Table Manage Columns Export Additional Columns 3 results - page 1 of 1 25

Workflow Initiated by Trainer 05 - Past 45 Days (clear all)

Name	Contract Name	Action	Contract Type	Status	Initiator	Initiation Date	Auto Renewal
New - Trainer 05 - WF5606a		New	Financial Services Agreement	In Process	Trainer 05	12/16/2021	
New - Trainer 05 - WF7853	Service Agreement (Clinical) - Trainer 05 - CT62594	New	Service Agreement (Clinical)	Activated	Trainer 05	12/16/2021	

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



Manage Columns 6

(clear all)

- Secondary Other Party(s)
- Secondary Responsible Party
- Sites
- Tertiary Responsible Party
- Workflow Template
- Auto Renewal

Cancel Apply