

## Search, Filter and Report on any Contract and Attachments Blog: November, 2013

*Contract Guardian Delivers Extensive Capacities in the Searching, Filtering and Reporting of Agreements.*



## Contract Results

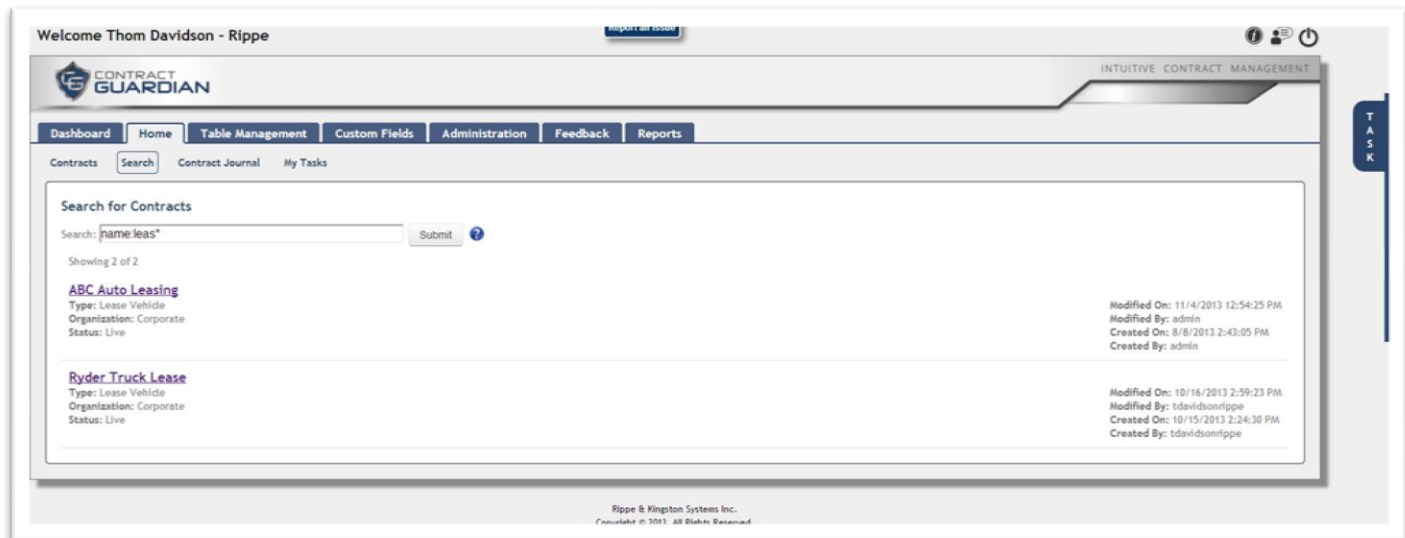
### Searching for Contracts and Contract Related Data

Simply enter a keyword or phrase in the search box and Contract Guardian will prepare the items that match your criteria. Additional options include:

- **Terms**  
Search terms without double quotes will be treated as single terms.  
*Ex: Search Terms*  
*This will be treated as "Search" "Terms" and both words will be found in your meta data, contracts and contract attachments.*
- **Phrases**  
A group of words surrounded by double quotes.  
*Ex: "Search Terms"*  
*This will be treated as one word and will only be found when both words are found in that order.*
- **Fields**  
You can search any field by typing the field name followed by a colon ":" and the term you are searching for.  
*Ex: title:"Search Terms"*  
*This will search for something with the title of "Search Terms". Since Contract Guardian provides you the option to create unlimited contract types and unlimited user defined fields; you can define very refined searches.*
- **Wildcard Searches**  
Contract Guardian supports single and multiple character wildcard searches within single terms. To perform a single character wildcard contract search use the "?" symbol. To perform a multiple character wildcard search use the "\*" symbol.

The single character wildcard search looks for terms that match that with the single character replaced. For example, to search for “contract” you can use the search c?ntract.

Multiple character wildcard searches look for 0 or more characters. For example, to search for sign, signature and signs you can use sign\*. You can also search your contract management repository by using the wildcard search in the middle of a term.



### Contract Management Search

## Filtering Contract Information

Contract Filtering is a great way to organize and search your contracts on ad-hoc basis. For example: In a healthcare environment you could select the Contract Type field to include “Physician” so that you can see all of your Physician Employment Agreements. You can combine multiple column heading filters as well. All of the contract grids provide the ability to sort each column in ascending or descending order. Once you identify the contract or group of contracts, you can immediately:

- View the contract
- Create a task for the contract
- Create a journal entry for the contract
- Send the contract via email

The filtering is provided in the following contract support grids: Contracts, Contract Types, Contract Statuses, Other Parties for a Contract, Contract Attachment Types, Task Types, Custom Contract Fields, and Custom Contract Fieldsets. The Contract Administrator has these features as well as system administration filtering on Contract Management Users, Roles, Permissions, Organizations and Departments.

**Note:** All of the contract management grids provide the client the ability to export their data to Excel or a PDF document.

### Document Types



	Id	Name	Organization	Type	Status	Effective	Expiration
★	4294	Ryder Truck Lease	Corporate	Lease Vehicle	Live	05/15/2013	
★	4293	Harris, Gene MD Employment Agreement	Corporate	Physician Employment Agreement	Live	07/17/2013	
★	4290	Dr. Harris Evaluation	Corporate	Physician Performance Evaluation	Live	10/15/2013	
★	23	ABC Auto Leasing	Corporate	Lease Vehicle	Live	10/16/2013	
★	4295	Intermec Warranty Krunchers	Corporate	Intermec Warranty	Live	10/16/2013	
★	4298	Demo	Corporate	Physician Employment Agreement	WIP	10/17/2013	
★	4299	Intermec Warranty Jones Corp	Corporate	Intermec Warranty	Live	10/18/2013	
★	4292	Mekelburg, Kenneth MD Employment Agreement	Corporate	Physician Employment Agreement	Live	10/18/2013	
★	4300	Motorola Warranty Jones	Corporate	Motorola Warranty	Live	10/30/2013	10/30/2015
★	4302	Agreement 1	COPSC	Motorola Warranty	Live	11/05/2013	

Show items with value that:

Is after

11/20/2012

And

Is equal to

Filter Clear

20 Items per page

1 - 10 of 10 items

## Contract Management Filtering

## Contract Management Reporting

Contract Guardian enables you to construct a report using criteria from any of the contract management field including user defined. Filtering (selecting) data is performed by a drop down menu of all the fields available in the system. Based on the field, it will present various options like (equals, greater than, less than), date from a pop up calendar, contains (example would be a drop down list of users). You can then add additional condition via the AND/OR inclusion. For example: You might want all contracts that are of the type LEASE and have a contract value greater than \$1,000.

Once you submit your results you can see your results almost instantaneously. The grid presentation allows you to scroll left and right. It also allows you to sort on any column as well as drag and drop a column into the sequence you desire. You can name and save the report definitions for future use.

Like all of the contract management grids, you can export the report to either Excel or PDF. One can also link directly to the document from the report results

	Id	Name	Organization	Type	Status	Effective Date	Expiration Date	Departments	Auto Renewal	Contract Value	Responsible Parties	Other Parties	Related
	4297	Motorola Warranty Hall	Corporate	Motorola Warranty	Live	1/1/2012	1/1/2015	Administration	false	23000	Thom Davidson	Hall Electric	
	4293	Harris, Gene MD Employment Agreement	Corporate	Physician Employment Agreement	Live	7/17/2013	7/17/2016	Administration	false	750000	Thom Davidson	Harris, Gene MD	Dr. Han Evaluat
	4291	Alexi Gage, M.D.	Corporate	Physician Employment Agreement	Live	11/15/2012	11/15/2013	Administration	false	260000	Thom Davidson	Alexi, Gage, M.D.	Ryder T
	4299	Intermec Warranty Jones Corp	Corporate	Intermec Warranty	Live	10/18/2013	10/18/2016	Administration	false	2222	Pam Bryant, Thom Davidson, John Reuter, John Reuter - Systems Admin	Jones Corporation	
	4295	Intermec Warranty Krunchers	Corporate	Intermec Warranty	Live	10/16/2013	10/16/2016	Administration, Development	false	45789	Pam Bryant, Thom Davidson	Krunchers Inc. (Bill Jones)	
	4292	Mekelburg, Kenneth MD Employment Agreement	Corporate	Physician Employment Agreement	Live	10/18/2013	10/15/2016	Administration	false	650000			

**Summary:** A contract management system needs to provide a powerful, easy to use and fast search and retrieval mechanism. **Contract Guardian delivers on all fronts.**

*Contract Guardian was designed with ease of use, simple administration and online training packaged into a powerful and flexible contract management system that delivers the perfect pairing for our clients in any industry. Learn more by [Scheduling a contract management demonstration](#) or contacting sales at 513.977.4544*