

# Contract Insight

## Desktop Edition

### Contract Management Tracking Software

#### User Guide

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## System Overview

Contract Management Tracking Software offers contract managers, administrators, and professionals the ability to easily track, renew, cancel or report on their contracts. Oftentimes, organizations have to engage in many contracts, such as, elevator maintenance, software license, telephone service, or sub-contractor contracts. Overtime it may be difficult to keep track of the renewal, review, or cancellation dates that make up the individual contracts. Moreover, a loss of productivity and increase expenses may arise from an inefficient contract administration process. Contract administrators may find that they are overwhelmed with the number of contracts they must track, report on, renew and cancel. They may find that it is inefficient to use a standard filing system via filing cabinets. Contract Management Tracking Software provides a simple solution to solve these problems.

CobbleStone Systems Contract Management Tracking Software provides a client-server and Windows-based contract management software solutions. For a web-based, enterprise contract management solution, please visit our website at <http://www.CobbleStoneSystems.com> and select 'Enterprise Edition'.

Contract Management Tracking Software can run on a single desktop, laptop computer or be used on a Local Area Network (LAN) in a multi-user environment. It can track important information pertaining to contracts such as: dates, notes, titles, employees, income, expenses, vendors, digital image of the actual contract (scanner not included), voice message, auto dial, early notification of expiring contract, and offers an automatic renewal feature.

In the sections to follow you will find the System Requirements, Installation Procedures, as well as the User Guide.

# Contract Insight System Requirements

## Typical Installation Operating System Requirements

- Microsoft Windows® 98
- Microsoft Windows NT® 4.0 ([SP 6a required](#))
- Microsoft Windows Millennium Edition (Windows Me)
- Microsoft Windows 2000 (SP2 Recommended)
- Microsoft Windows XP Professional
- Microsoft Windows XP Home Edition

## PC Hardware System Requirements

- Microsoft Windows 98/2000/XP (or better) operating system.
- A personal computer with a 486DX 66 megahertz (MHz) or faster processor (Pentium central processing unit recommended).
- 64 megabytes (MB) of memory (128 MB recommended).
- hard disk space requires 500 MB of free hard disk space (at least 200 MB of free disk space)
- VGA or higher resolution (16-bit or 24-bit color SVGA recommended).
- Mouse or compatible pointing device.
- Computer capable of supporting the Microsoft .NET Framework 1.0 and 2.0

## Optional

- Scanner with Scanner Software
- Soundcard with audio recording and playback device

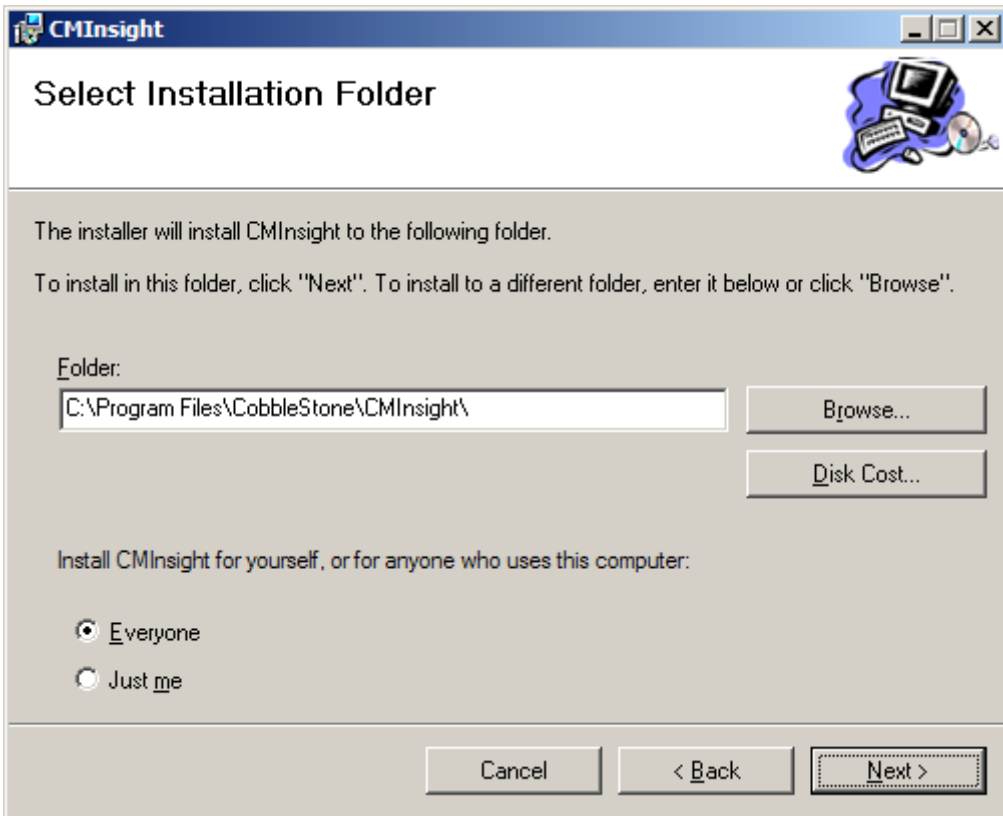
## Installation Procedures

Installing Contract Management Software from the Internet at <http://www.cobblestonesystems.com>

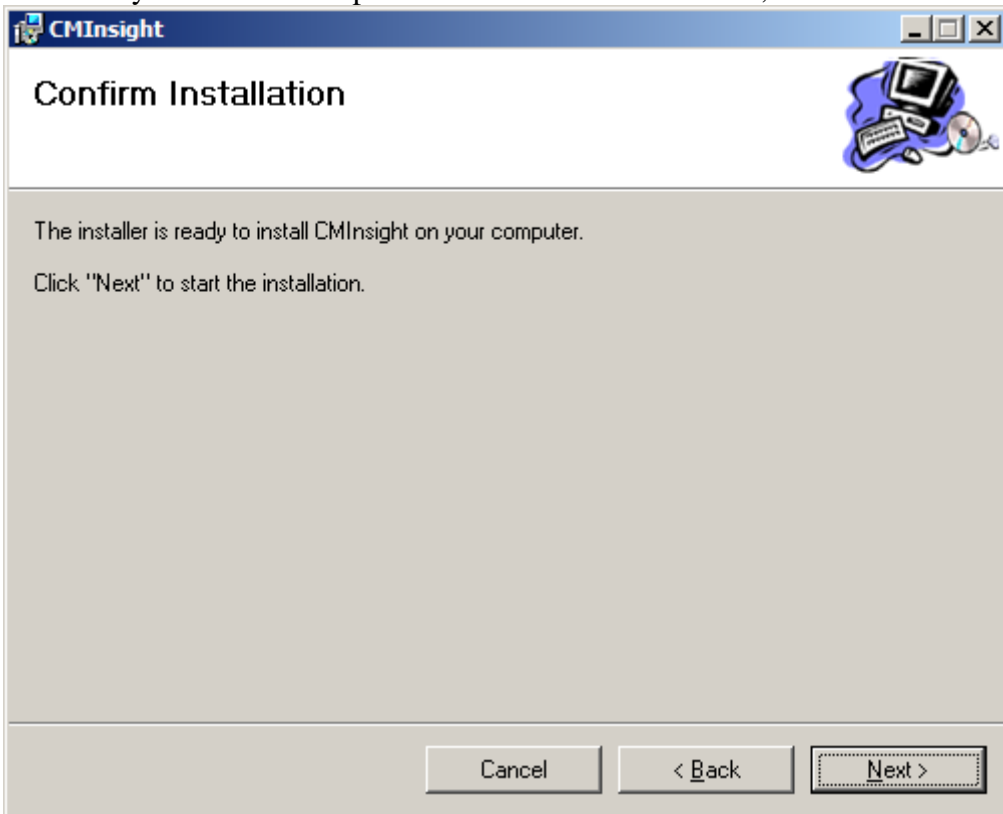
1. Create a temporary Folder on your hard drive.
2. Download installation file to a temporary location on your hard drive or select 'Run' to start the installation.



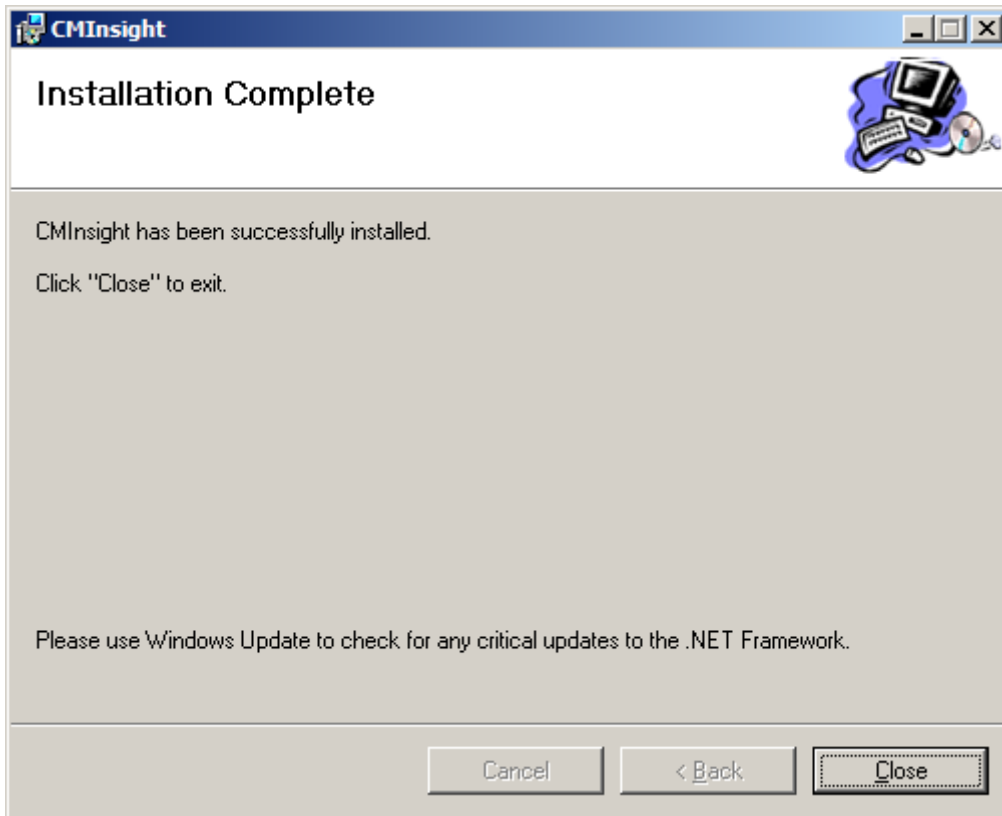
3. Select 'Next,



4. Modify the installation path if needed and select 'Next',



5. Select 'Next' to confirm the installation,



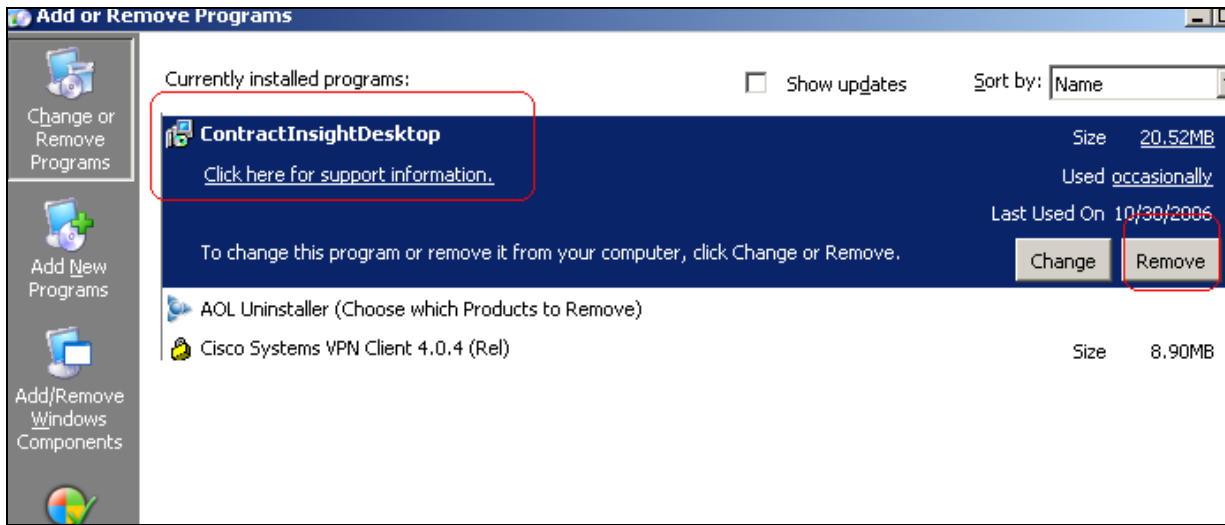
6. Select 'Close' to complete the installation or follow the Installation Wizard to complete the installation process.

## Uninstalling (Removing) Contract Management Software

Prior to un-installing or upgrading ContractInsight, be sure to backup the Contract.mdb file in the "C:\Program Files\CobbleStone\ContractInsight\" file directory (or the selected installation directory when installed). This will ensure that you do not lose any data entered into the system prior to an update.

To uninstall, be sure to backup as per the instructions above. Next, select "Add/Remove Programs" in the Windows Control Panel. Select "Contract Management Software" from the list and select "Add/Remove". Follow the uninstall wizard.

**Note: All data will be removed upon uninstalling Contract Management Software.**



# Multi-User Environment

## Working in a Multi-User Environment

To use Contract Management Tracking System in a multi-user environment there are several steps one must take.

1. Purchase and installed the system on each computer (select the default options upon installation).
2. Select a shared network folder or directory and a copy and paste the "Contract.mdb" file in the shared folder. The Contract.mdb file can be found among the installations files.
3. Edit the application configuration file (using Notepad) found in the installation path of each PC that the system in installed on. Modify the "Data Source" string as follows:

```
id=:Data Source=Contract.mdb;Pas
```

4. Modify the Data Source path from  
"C:\Program Files\Contract Management Software\contract.mdb" (or "contract.mdb")  
to  
"\\ServerNameOrDriveLetter\path\contract.mdb" (without the quotes).

To use a network version of the system, you must alter the "Data Source" string.

For example, if you have a network shared drive entitled "N" for N drive and the "Contract.mdb" file is on the following path "N:\contracts \contract.mdb".

NOTE: You can also use the UNC. For example, "\\servername\path\contract.mdb". Also, be careful and make sure all of the string is type properly. The application configuration file should be modified on all user's computers that need to share the database.

## **Location of Scanned Files and Tracked Documents:**

### **Configuring the location of scanned documents and files.**

To change the configuration of where documents and files are stored, located the Config file in the systems installation directory (noted in the installation section of this manual). Open the .config file with notepad. Locate the FilePath key value (seen below). To modify the location of where scanned files and documents are stored, enter the path (or network path) to the location. NOTE: It is not recommended to change this location after the first documented is scanned or file is attached.

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <appSettings>
    <!--Access DB Connection String-->
    <add key="DatabaseConnectionStri
    <add key="FilePath" value="" />
```

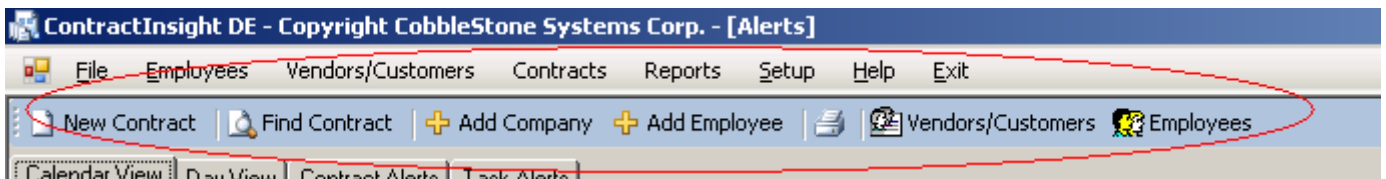
# Starting the Program

## Starting Contract Management Software (After the Installation is Complete)

Select "Start" on your Windows Desktop, select "Programs", "Contract Insight", "Contract Insight". This is the preferred method of starting Contract Management Software.

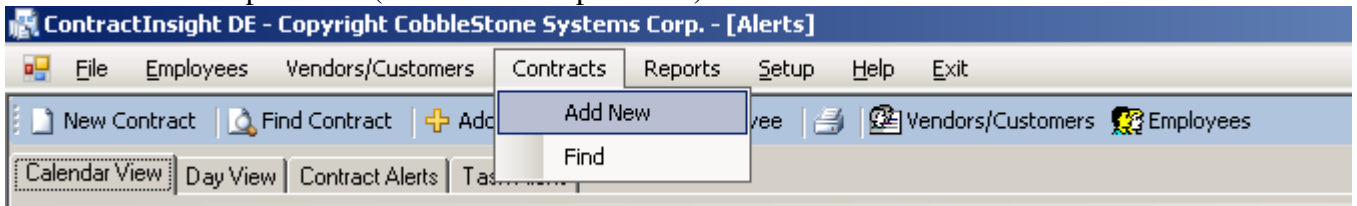
## Navigating through the Interface

The Main File Menu is the best way to navigate through Contract Management. It features buttons that correspond to each topic of Contract Management. For example, the Employee button will allow the user to view the Employee information, such as, entering a new employee or finding/editing an existing employee. A screen shot of the main file menu is below:

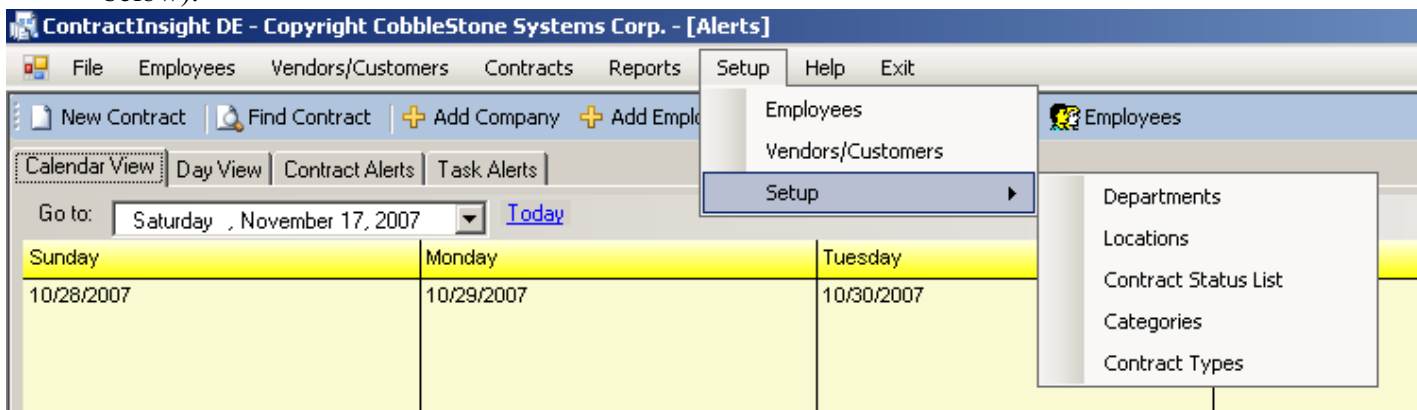


## Main Menu Options

1. The Contracts, Vendors, Employees, Setup, Actions, Help, and Exit menu options will display their respective sub menus.
2. Selecting the Contracts menu item, and next selecting the Add New item will bring the user to the Contract Input Form (see Contract Input Form).

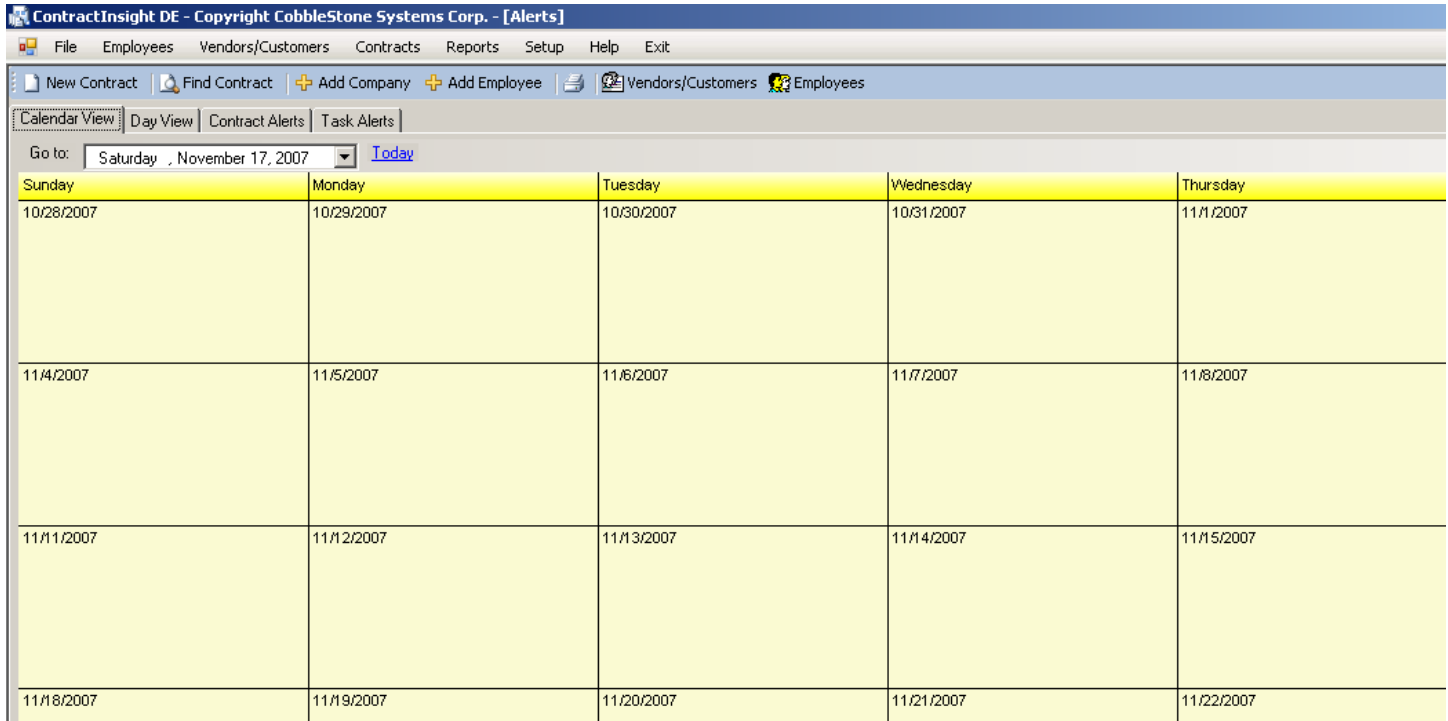


3. The Find menu item will bring the user to the Find a Contract Form (See Find a Contract Form).
4. The Contract Expiring tabs (seen above) will show the user all the Contracts that are currently expiring based on the tab selected.
5. The Setup menu will bring the user to the various setup files such as Departments, Contract Types, Locations, Categories and more. This will be discussed about in greater detail later (seen below).



# Contract Warning System:

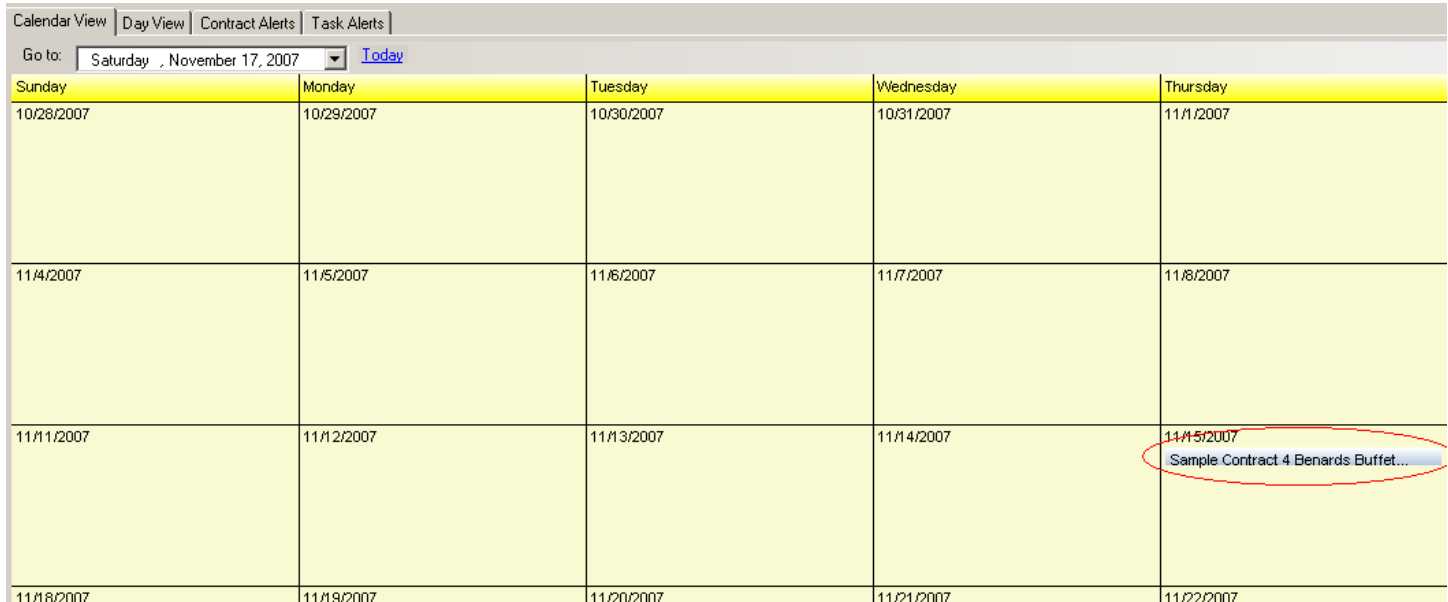
Every time the system is opened the contract management system will scan all expiring contracts based on the "End Date" and the "Notify Days" that was entered into your contract records. To open the contract, just double-click the line item with your mouse.



The screenshot shows the 'ContractInsight DE - Copyright CobbleStone Systems Corp. - [Alerts]' window. The menu bar includes File, Employees, Vendors/Customers, Contracts, Reports, Setup, Help, and Exit. The toolbar contains icons for New Contract, Find Contract, Add Company, Add Employee, Vendors/Customers, and Employees. The 'Calendar View' tab is active, showing a calendar for November 2007. The 'Go to' dropdown is set to 'Saturday, November 17, 2007' with a 'Today' link. The calendar grid displays dates from 10/28/2007 to 11/22/2007, organized by day of the week (Sunday through Thursday).

Sunday	Monday	Tuesday	Wednesday	Thursday
10/28/2007	10/29/2007	10/30/2007	10/31/2007	11/1/2007
11/4/2007	11/5/2007	11/6/2007	11/7/2007	11/8/2007
11/11/2007	11/12/2007	11/13/2007	11/14/2007	11/15/2007
11/18/2007	11/19/2007	11/20/2007	11/21/2007	11/22/2007

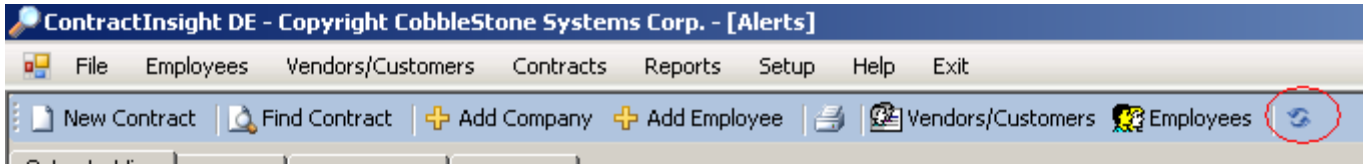
Alerts will be displayed on the calendar based on the contract or task end date; and based on the notify days prior to the contract and task end date (seen below). To view a contract that is displayed on the calendar, double click on the Contract Title (seen below)—this will open the contract detail screen.



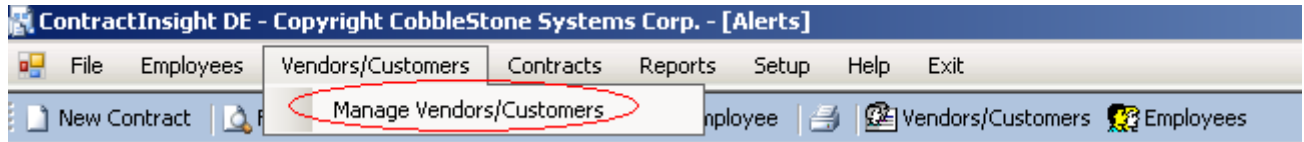
This screenshot is similar to the previous one but highlights a specific contract alert. The date 11/15/2007 is circled in red, and a blue tooltip box is visible over it containing the text 'Sample Contract 4 Benards Buffet...'. The rest of the calendar grid and interface elements are identical to the previous screenshot.

Sunday	Monday	Tuesday	Wednesday	Thursday
10/28/2007	10/29/2007	10/30/2007	10/31/2007	11/1/2007
11/4/2007	11/5/2007	11/6/2007	11/7/2007	11/8/2007
11/11/2007	11/12/2007	11/13/2007	11/14/2007	11/15/2007 Sample Contract 4 Benards Buffet...
11/18/2007	11/19/2007	11/20/2007	11/21/2007	11/22/2007

To refresh the calendar view, select the refresh icon (on the calendar page tool menu).

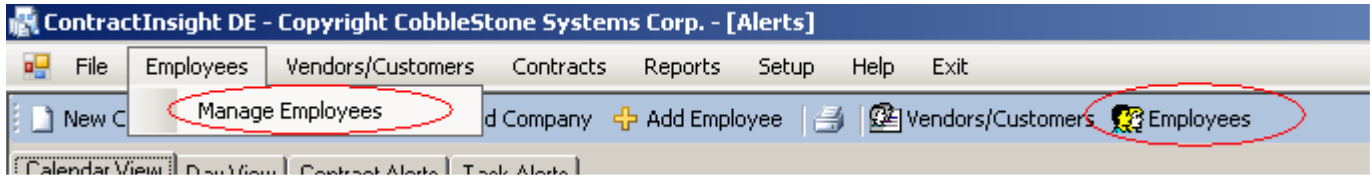


## Vendors and Customers (Companies) Management and Setup

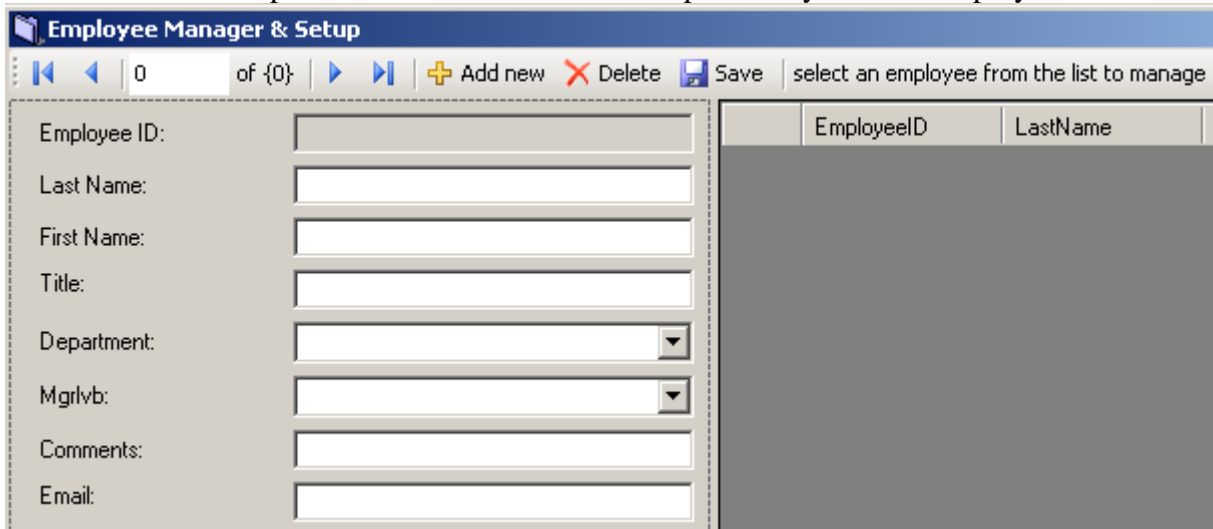





1. The Manage Vendors and Customers (Companies) menu item will bring the user to the Vendor/Customer Input Form (see Vendor Input Form for more details).
2. To find or view an existing vendor or customer, select 'Manage Vendors' then click the vendor in the vendor list (seen below). This will allow the user to find a previously entered Vendor.
3. to Add an new vendor or customer select the add button

# Employees Management and Setup



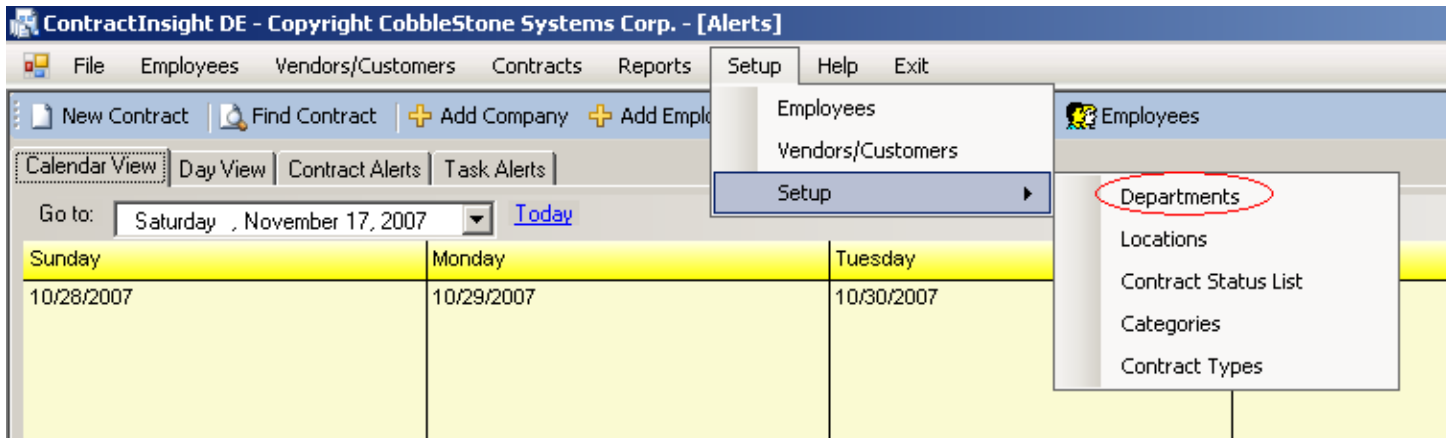
1. The Manage Employees option will allow the user to view or add Employees (see Employee Input Form). This is used to enter a new Employee into the database. Start off by entering all Employees first.
2. The find or view Employees, select the Manage Employee option, click on the Employee list seen below. This will permit the user to view and edit previously entered Employees.



3. to add a new employee, select the add button .
4. to save changes, select the save button .
5. to delete an employee, select the delete button .

# Setting Up Departments, Locations, Contract Status, Categories, and Contract Types




It is recommended to add as many Department, Locations, Status, Categories, and Contract Types prior to entering your first contract record.



To set up Departments, select the Departments sub menu displayed above.

The Departments Management form will appear.



1. To add a Department, select the Add button , enter the Department name, and be sure to select the Save button.
2. To edit or view a Department, click on the Department in the grid (seen above). Modify the Department name if needed, and select Save .
3. To delete a Department (not recommended if there are contracts assigned to a Department), select Delete .

To manage Departments, Locations, Status, Categories, and Contract Types follow the same instructions as above except select the appropriate menu item for Locations, Status, Categories, or Contract Types. Be sure to set these items (lists) up prior to entering in Contracts.

Departments

1 of 7 | Add new | Delete | Save

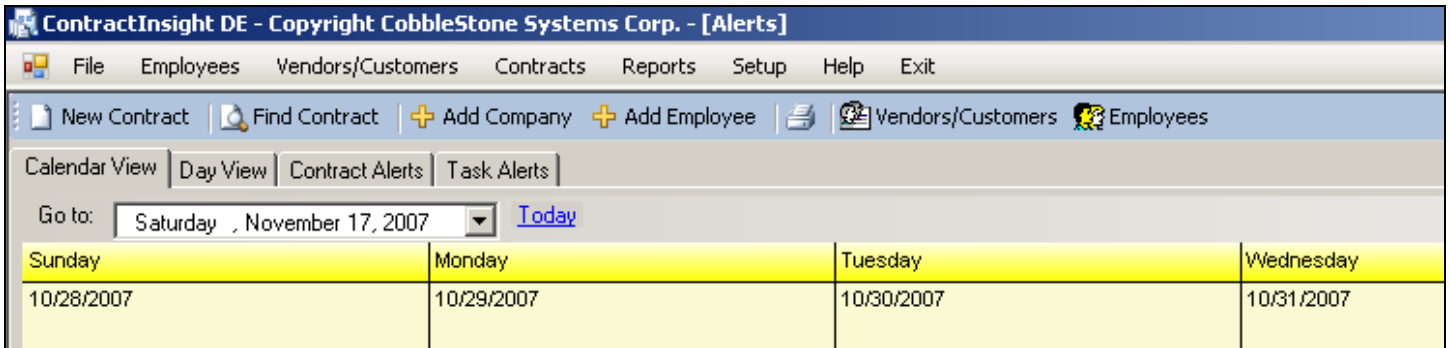
DepartmentID	Department
1	Accounting
2	Finance
3	Marketing
4	Administrative
5	Transportation
6	Information Tech...
7	Sales

Department ID: 1

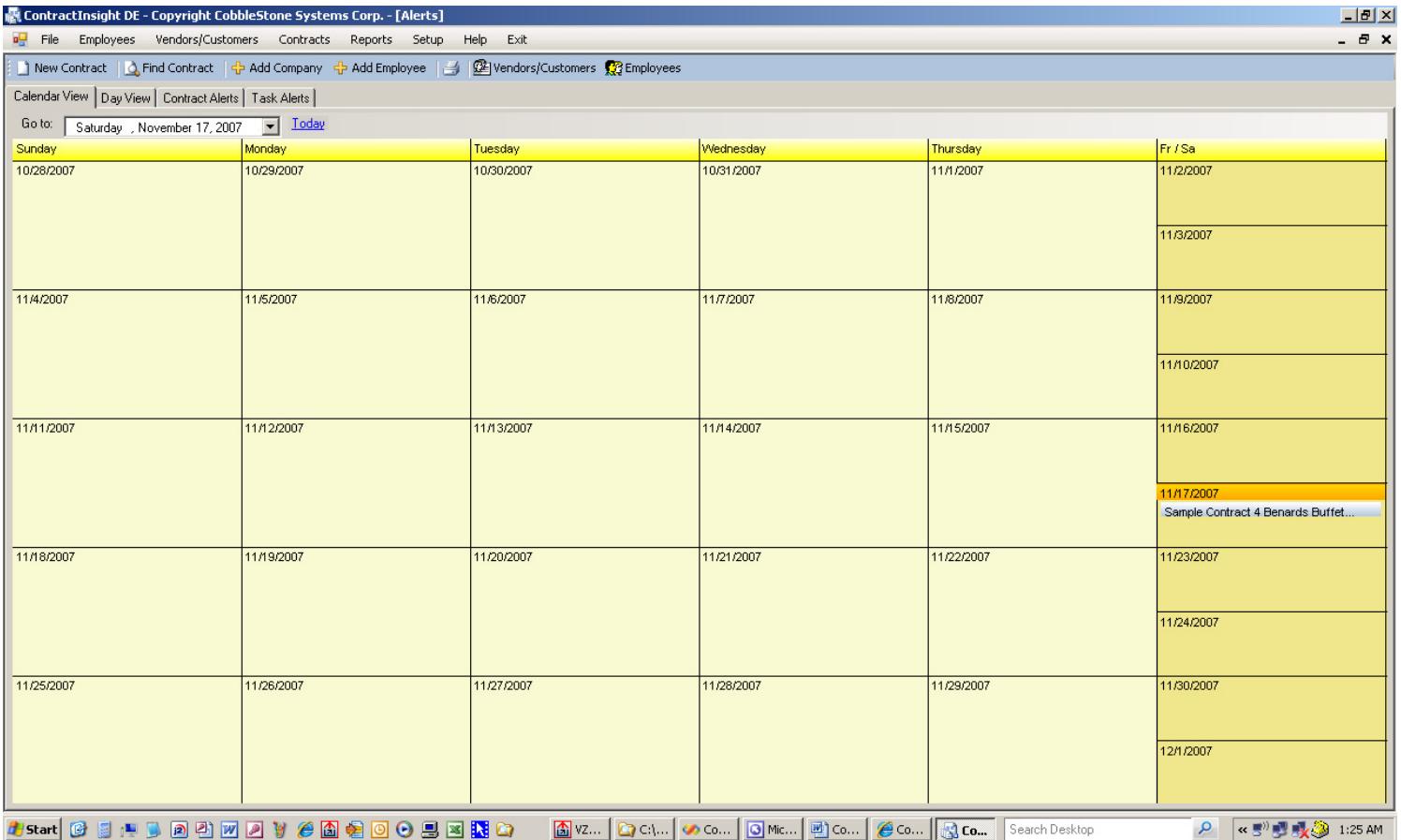
Department: Accounting

# Contract Expiring Message and Notifications

If there are Contracts expiring alerts or Task expiring alerts, you will be notified when you start the program. At this point you may choose either to view the contracts or not. You can view the contract by double clicking the row of any contract item showing in the expiring grid (seen below). You can select from the various tabs (seen below) to view contracts expiring by a Calendar (Month) View, Day View, or various list views.

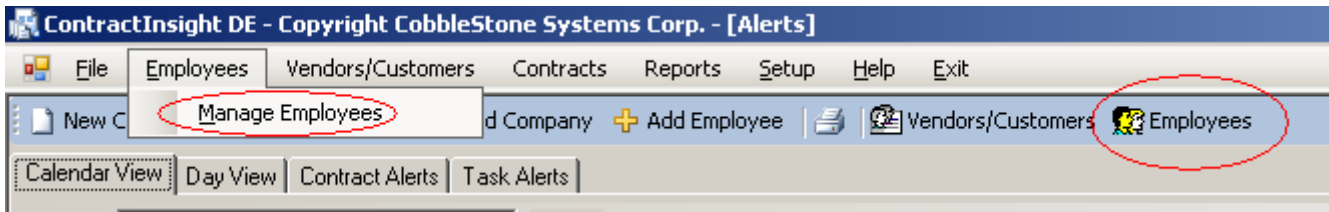


**Calendar View:** ContractInsight includes several views for displaying Contract and Task alerts. The Calendar View is the default view and will display alerts based on the month selected in the Calendar View tab. To move and view another month, select the calendar box and navigate to the month, day, and year desired. To open or view an expiring contract or task, double click on the Contract or Task title displayed on the calendar.

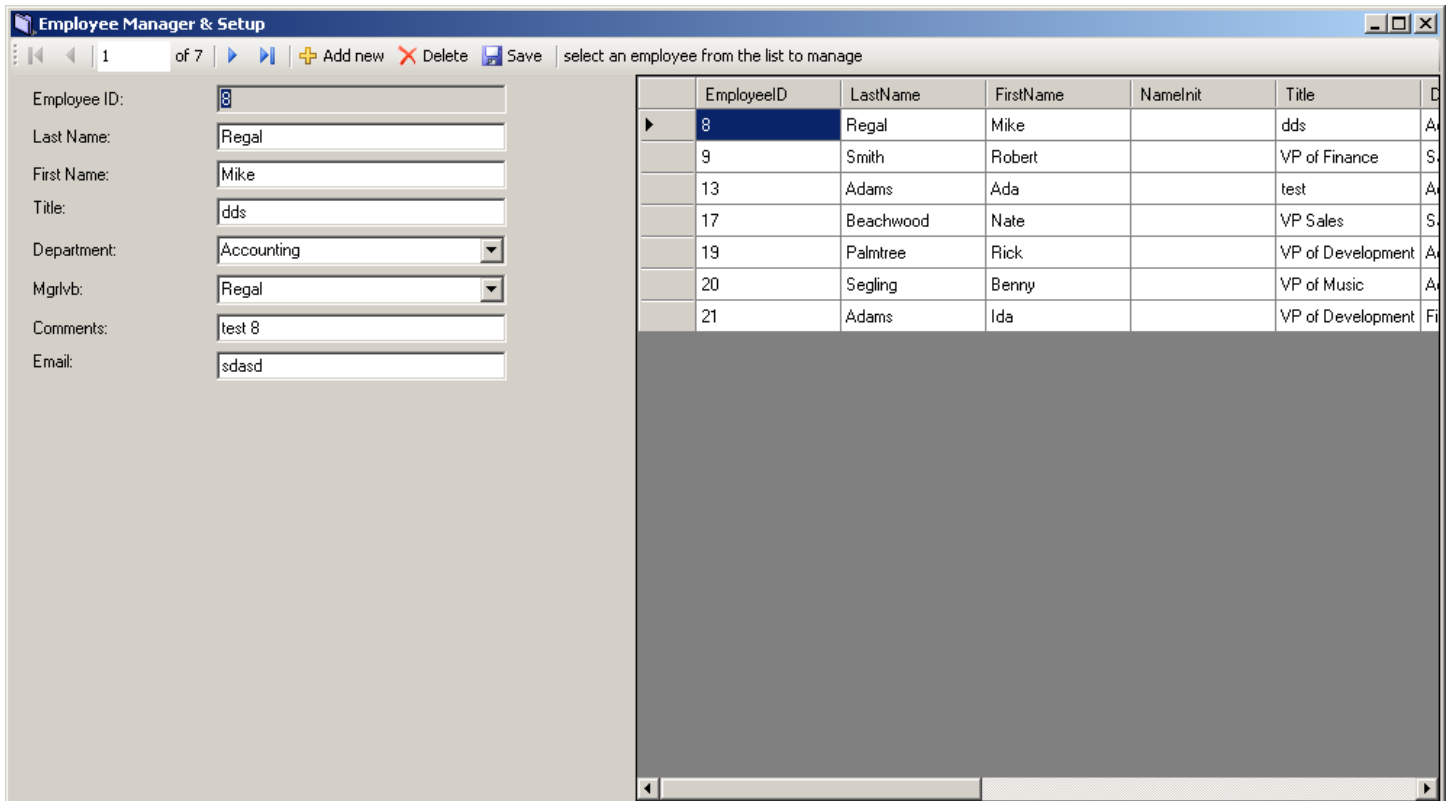


# Employee Input Form and Employee Management



To navigate to the employee input and management form, select the Employee menu item, next select the Manage Employees sub-menu item (seen below).

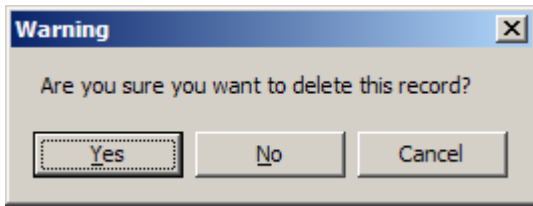


The Employee input and management form will appear in a separate window.



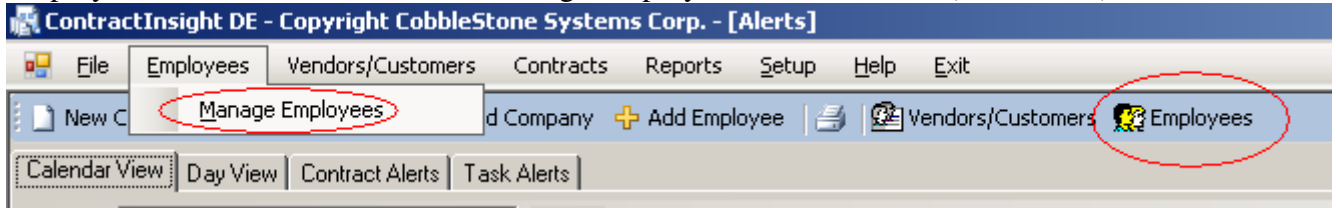
The Employee Input Form allows the user to enter (add) or edit information pertaining to employees. (It is recommended that the user enter all Employee and Vendor information before entering contract information)

- To add a new employee, select the Add button . Next, enter in the information about the Employee. Next, select the Save button.
- To edit an employee, select the employee from the Employee List grid (seen above) by double clicking on the employee row. Next, modify the data in the fields provided. Next, select the Save button.
- To delete an existing employee (although not recommended unless it was entered by mistake), select the employee from the Employee List grid (seen above) by clicking on the employee row. Next, select the Delete button . You will be prompted to confirm or cancel the deletion.

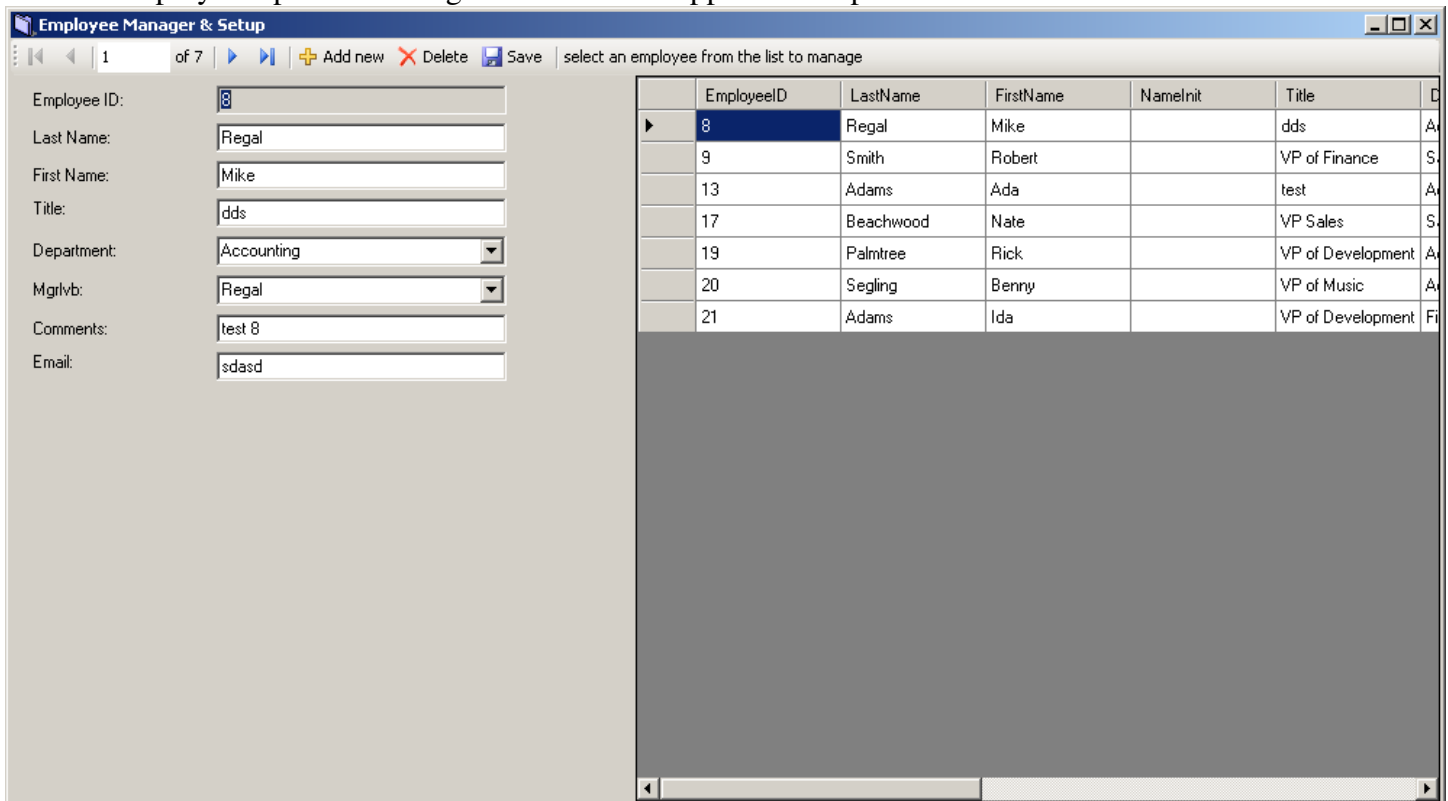


## Find, View, and Edit Employees

1. To edit or view an employee, navigate to the employee input and management form, select the Employee menu item, next select the Manage Employees sub-menu item (seen below).



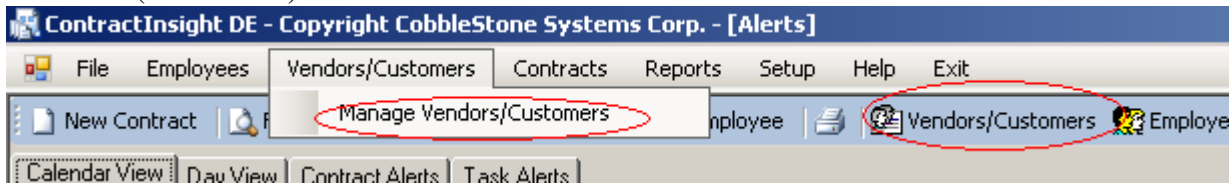
2. The Employee input and management form will appear in a separate window.



3. To find, view, or edit an employee, select the employee from the Employee List grid (seen above) by double clicking on the employee row.
4. Next, modify the data in the fields provided. Next, select the Save button.

# Vendor and Customer Management

To enter, add, and manage Companies , select the Manage Vendors submenu from the Vendor main menu bar (seen below).



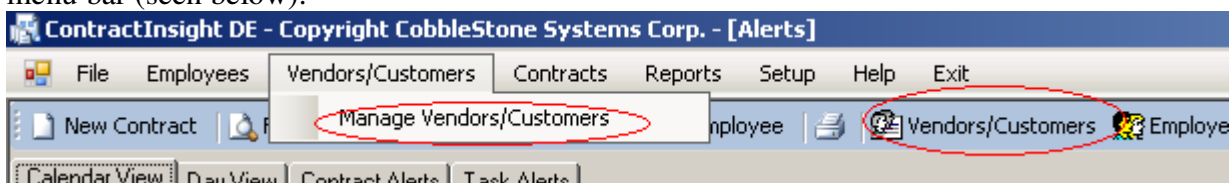
The Vendor Management form will appear (seen below).

VendorID	VENDNAME	ADDRESS	CITY
263	Kencon Environ...	2311 Route 70 ...	Cherry Hill
264	Danmark Contrac...	924 Main Street	Williamsville
265	Inter-Office Suppl...	456 Landslide Ro...	Dataville
268	Business Manag...	924 Hampton Way	924 Hampton W
269	Benards Buffet	101 Kings Highway	101 Kings High
270	American Applian...		
272	American Leasing		
273	Lions Gate		

1. The Vendor Input Forms allows the user to enter or edit Companies information.
2. To add a new Vendor or Customer select the Add button (see above).
  1. next enter in the company information in the fields provided and select Save.
3. To view or edit an existing Company, double click the Company in the grid seen above. Their data will fill in the form. You may modify the data and select Save to save the changes.
4. To delete a Company, select the Delete button.
5. To close the Vendor screen, select the Close button.

## Find Vendor Form

To find and mange Vendors or Customers, select the Manage Vendors submenu from the Vendor main menu bar (seen below).



The Vendor Management form will appear (seen below).

VendorID	VENDNAME	ADDRESS	CITY
263	Kencon Environ...	2311 Route 70 ...	Cherry Hill
264	Danmark Contrac...	924 Main Street	Williamsville
265	Inter-Office Suppl...	456 Landslide Ro...	Dataville
268	Business Manag...	924 Hampton Way	924 Hampton W
269	Benards Buffet	101 Kings Highway	101 Kings Highw
270	American Applian...		
272	American Leasing		
273	Lions Gate		

6. To view or edit an existing Company, double click the Company in the grid seen above. Their data will fill in the form. You may modify the data and select Save to save the changes.
7. To delete a Company, select the Delete button.
8. To close the Vendor screen, select the Close button.

## Contract Entry & Edit Form

To enter in (add) a new contract record, select the Contracts menu item, then select the Add New submenu item.



The Contract record entry will appear.

Next the Contract Input form will display. Enter the Contract Title, select a Vendor (if a vendor is not in the list, close the screen and add a new vendor (see Vendor Management for more info), enter the Contract Start Date, enter the Contract End Date, enter the Notify Days (the system will notify you via the list box on the main system page based on the number of days entered before the Contract End Date), enter a description and additional information.

A screenshot of the 'Contract Detail Manager' form. The title bar reads 'Contract Detail Manager'. The form contains several input fields and dropdown menus. At the top, there are navigation buttons: '<<', '<', '1 of 1', '>', '>>', '+ Add new', 'X Delete', and 'Save Data'. The main form fields include: 'Contract Title: Sample Contract', 'Start Date: 11/17/2007', 'Contract ID: 4', 'Vendor/Customer: Benards Buffet', 'End Date: 11/17/2007', 'Contract Type: [dropdown]', 'Employee: Adams, Ada', 'Notify Days: 0', 'Status: [dropdown]', 'Signed by: Adams, Ada', and 'Contract Amount: 0'. Below these are tabs for 'Details', 'Terms', 'Misc./License', 'Warranty', 'Confidentiality', 'Indem/General', 'Files/Documents', 'Financials', and 'Tasks'. The 'Details' tab is active, showing fields for 'Department', 'Location', 'Category', 'Monthly Cost: 0.0000', 'Current Cost: 0.0000', 'Annual Review Date: 11/17/2007', 'Price Review Date: 11/17/2007', 'Insurance Cert Date: 11/17/2007', and 'Renewed: [checkbox]'. There are also 'Notify Days' input fields for each review date. At the bottom, there are two large text areas for 'Description' and 'Notes'.

1. The Contract Input Form automatically displays how many days the contract has left and when the contract was entered.
2. The user can enter the following information: The Contract Title, Vendor (select from list), The Product, The Contract Start and End Date (Year 2000 Compliant), Employee Contact (select from list) and Signed By information.
3. The Type list box can be used to track various types of agreements, such as: leases, licenses, maintenance, health care agreement, filings, and other committals.

4. The Contract Code can be used to track Contracts by specific codes. You may also print Contracts by Code.
5. The Confidential, Term, Terminal, Warranty, Payments, and General tabs enable users to track large amounts of text about the contract.
6. The Notify Days field informs the database of when to notify you when the contract is expiring.
7. The Financials Tab will show the Income/Expense Tracking screen to enable your users to track financial transactions.
  1. You may enter Deposit and Withdraw information in the Income/Expense Tracking Screens. Contract Balance is automatically calculated.
8. The Tasks/Alerts tab enables users to add and track multiple tasks and assign the tasks to other employees.
9. The File/Documents tab allows the user to add or view the files, documents, and scanned images of a Contract.
10. Action buttons: the Save button will save your entry, the Close button will cancel the entry or changes and close the entry screen, and the Delete button will permanently delete the contract record.



# Contract Task Alerts and Task Management

The Tasks/Alerts tab enables users to add and track multiple tasks and assign the tasks to other employees.

**Contract Detail Manager**

1 of 1 | + Add new | X Delete | Save Data

Contract Title: Sample Contract | Start Date: 11/17/2007 | Contract ID: 4  
Vendor/Customer: Benards Buffet | End Date: 11/17/2007 | Contract Type:  
Employee: Adams, Ada | Notify Days: 0 | Status:  
Signed by: Adams, Ada | Contract Amount: 0 | Invoice/Contract#:

Details | Terms | Misc./License | Warranty | Confidentiality | Indem/General | Files/Documents | Financials | **Tasks/Alerts**

0 of 0 | + Add task | X Delete task | Save task | select a task from the grid to edit

Task Name:	TaskID	TaskName	TaskEndDate	NotifyDays	Emp
Task End Date: 11/17/2007	*				
Notify Days: 0					
Employee ID: Adams, Ada					
Notes:					
Status: Open					
Completed:					

Note: before entering tasks into a contract, be sure to select the 'Save Data' button on the contract entry screen.

1. To add a new task for a contract, select the Tasks/Alerts tab on an existing contract record.
2. Next, select the 'Add Task' button on the Task menu control.
3. Next, enter in the Task Name, select an Employee, enter in the task start date and task end date, enter in the notify days, enter in notes if needed, and be sure to select the 'Add task' button (seen above).
4. The new tasks will be displayed in the grid (seen above).
5. To view an existing Task, select the task in the grid (seen above) and click the row.
6. The Task edit screen will appear (seen below). Edit the values and select 'Save task' to save your changes. Select the 'Delete task' button to delete the task.

Contract Title: Sample Contract Start Date: 11/17/2007 Contract ID: 4

Vendor/Customer: Benards Buffet End Date: 11/17/2007 Contract Type:

Employee: Adams, Ada Notify Days: 0 Status:

Signed by: Adams, Ada Contract Amount: 0 Invoice/Contract#:

Details Terms Misc./License Warranty Confidentially Indem/General Files/Documents Financials **Tasks/Alerts**

0 of 0 Add task Delete task Save task select a task from the grid to edit

Task Name:	TaskID	TaskName	TaskEndDate	NotifyDays	Emp
Task End Date: 11/17/2007	*				
Notify Days: 0					
Employee ID: Adams, Ada					
Notes:					
Status: Open					
Completed:					

## Contract Notes

The Notes tab enables users to add and track multiple notes per contract record.

Contract Title: Sample Contract Start Date: 11/18/2007 Contract ID: 1

Vendor/Customer: American Appliance End Date: 11/18/2007 Contract Type:

Employee: Adams, Ada Notify Days: 0 Status:

Signed by: Adams, Ada Contract Amount: 0 Invoice/Contract#:

Details Terms Misc./License Warranty Confidentially Indem/General Files/Documents Financials Tasks/Alerts **Notes**

0 of 0 Add note Delete note Save note select a note from the grid to edit

Note:	EntryDate	Note

Note: before entering Notes into a contract, be sure to select the 'Save Data' button on the contract entry screen.

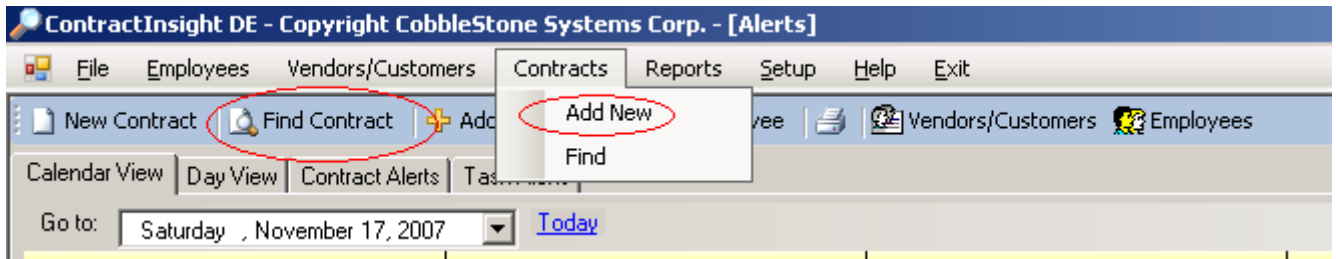
1. To add a new note for a contract, select the Notes tab on an existing contract record.
2. Next, select the 'Add note' button on the Notes tab menu control.
3. Next, enter in the Notes text and enter in the date, enter in notes if needed, and be sure to select the Add note button (seen above).

4. The new notes we be displayed in the grid (seen above).

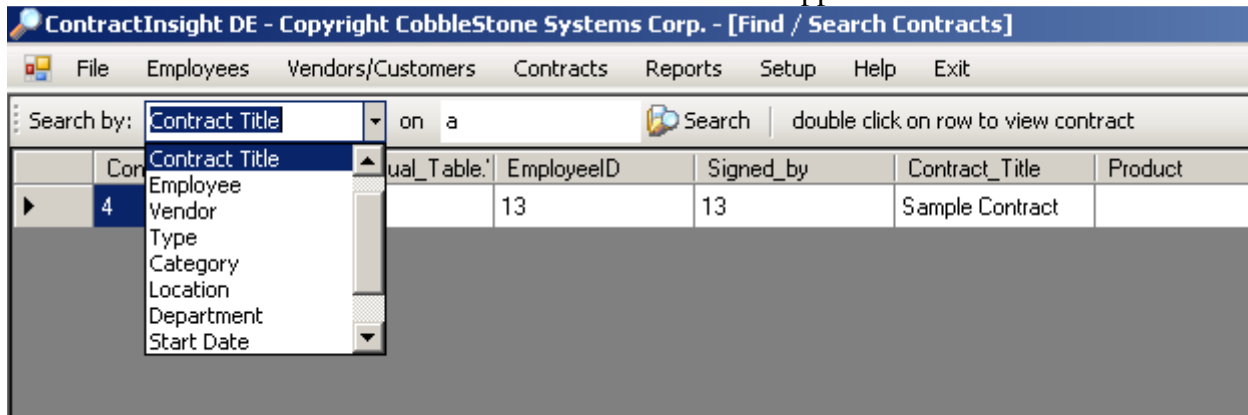
To view an existing note, select the Notes tab and select a Note item in the grid (seen above).

The Note edit screen will appear (seen above). Edit the values and select 'Save note' to save your changes. Select the 'Delete note' button to delete the selected note.

## Find Contract Form



To begin the process of finding or locating an existing contract record, select the Contracts menu, next select the Find submenu item. The Find Contract screen will appear.



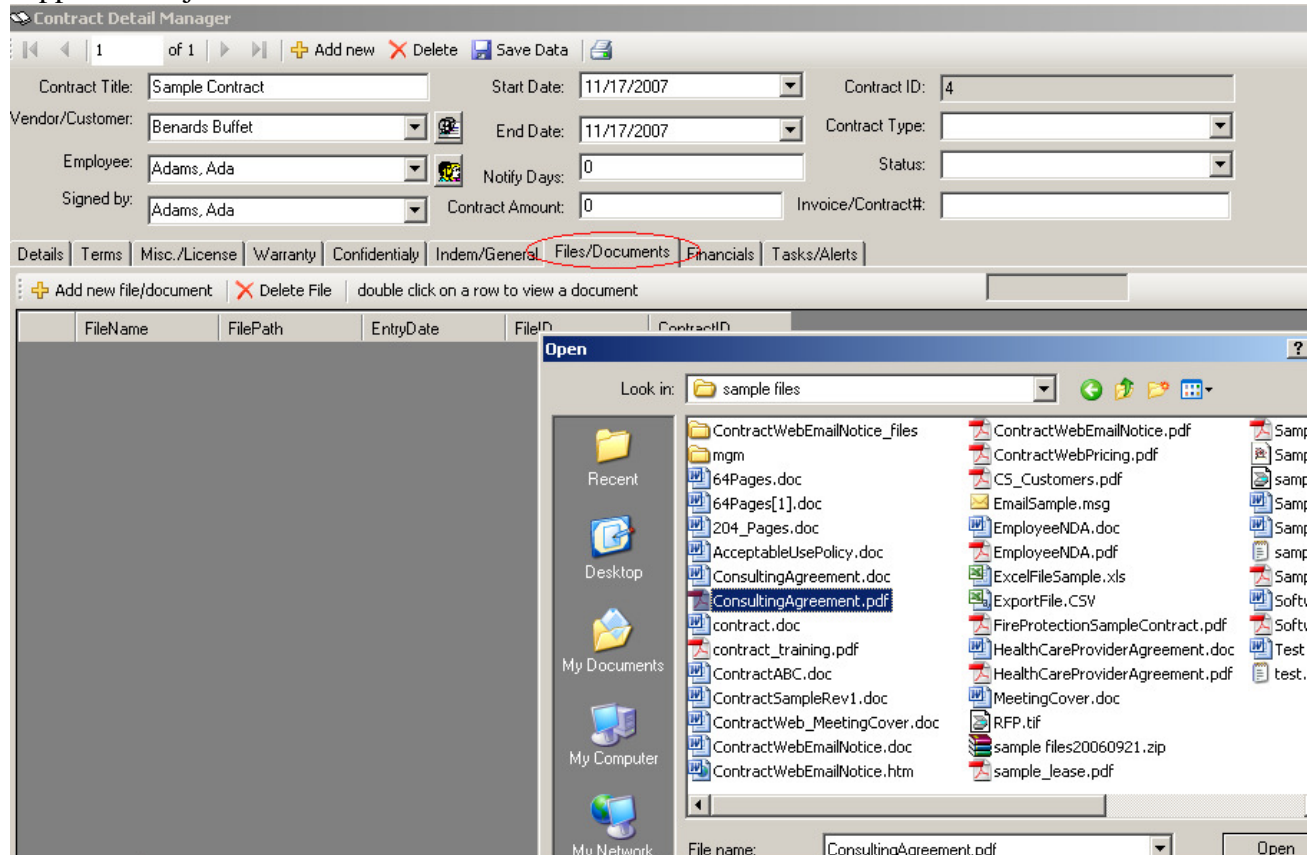
To find a Contract by Vendor, select a Vendor from the Search By list, enter a value in the entry box (seen above), and click the corresponding Search button. Repeat this process for search by other search criteria. The contract search results will appear in the grid (seen above). To view a contract record, double click on the row in the grid and the Contract Add/Edit screen will appear.

Examples:

- To find a Contract by Employee, select an Employee from the list and click the corresponding button.
- To find a Contract by Product, select a Product from the list and click the corresponding button.

# Scanned Image, Scanning Documents, Attaching Files

The Files/Documents (images) tab allows the user to enter files and other objects such as Scanned Images, Voice Messages, Word Documents, spreadsheets, PDF files, multi-page TIF files, or any other supported Object File.



Note: before entering files/documents into a contract, be sure to select the 'Save Data' button on the contract entry screen.

## To insert a scanned file do the following:

1. First scan the image of a Contract using your scanner and scanner software (scanner not included with they system). Save the scanned contract (or document) to a file location with a name you are familiar with (apostrophes in the file name are not supported). Note: it is recommended to scan images and document to the multi-page tiff (TIF) format. Please refer to you scanner documentation to convert scanned documents to multi-page tif format or contact CobbleStone support.
2. From the Images/Files tab (located on the Contract screen) select Add new File button, next, the file dialog box will appear (seen above). Next, navigate to the folder location of the scanned file (or other file), select the file, select Open. The file will be added to the contract record. The files will be displayed in the data grid (seen above). Note: additional software or hardware may be required.
3. To view or open a file, select a file in the data grid, next double click on the row selected. The software will open the document.
4. To delete a file, select the file (in the data grid row), next select the Delete File button and confirm the delete (this cannot be undone).

To add a saved file (such as MS Word, Excel, Emails, or PDF files), follow the same steps.

### **Configuring the location of scanned documents and files.**

To change the configuration of where documents and files are stored, located the Config file in the systems installation directory (noted in the installation section of this manual). Open the .config file with notepad. Locate the FilePath key value (seen below). To modify the location of where scanned files and documents are stored, enter the path (or network path) to the location. NOTE: It is not recommended to change this location after the first documented is scanned or file is attached.

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <appSettings>
    <!--Access DB Connection String--
    <add key="DatabaseConnectionStri
    <add key="FilePath" value=""/>
  </appSettings>
</configuration>
```

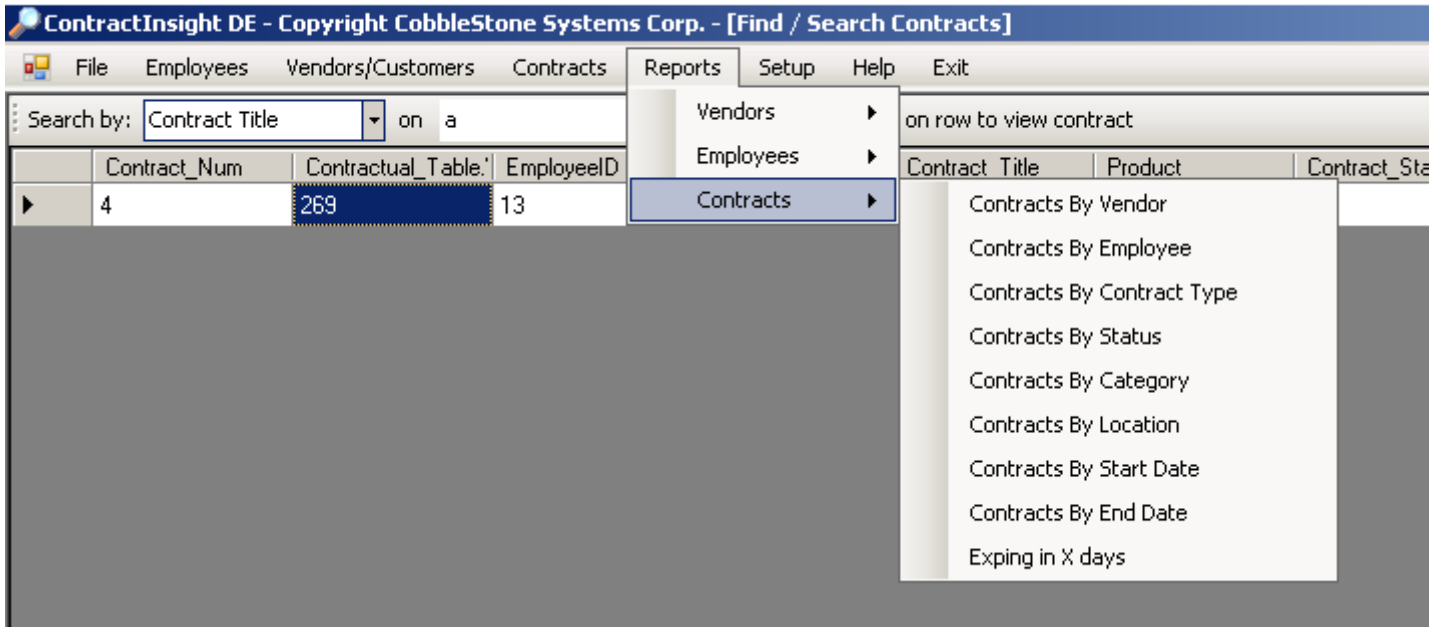
## Enter/Edit Income and Expense Transactions

The screenshot displays the 'Contract Detail Manager' application window. The title bar reads 'Contract Detail Manager'. Below the title bar is a navigation bar with '1 of 1' and buttons for 'Add new', 'Delete', and 'Save Data'. The main form contains several fields: 'Contract Title' (Sample Contract), 'Start Date' (11/17/2007), 'Vendor/Customer' (Benards Buffet), 'End Date' (11/17/2007), 'Employee' (Adams, Ada), 'Notify Days' (0), 'Signed by' (Adams, Ada), and 'Contract Amount' (0). Below these fields is a tabbed interface with tabs for 'Details', 'Terms', 'Misc./License', 'Warranty', 'Confidentially', 'Indem/General', 'Files/Documents', and 'Financials'. The 'Financials' tab is selected and circled in red. Below the tabs is another navigation bar with '0 of 0' and buttons for 'Add new', 'Delete', and 'Save', followed by the text 'select a transaction below to edit'. The main area is divided into two sections: on the left, a form with fields for 'Trans Name:', 'Description:', 'Acct Code:', 'Deposite:', 'Withdraw:', 'Note:', 'Date:' (11/17/2007), and 'Hours:'. On the right, a table with columns 'Transaction\_ID' and 'Contract\_ID' is visible, but its content is obscured by a grey rectangle.

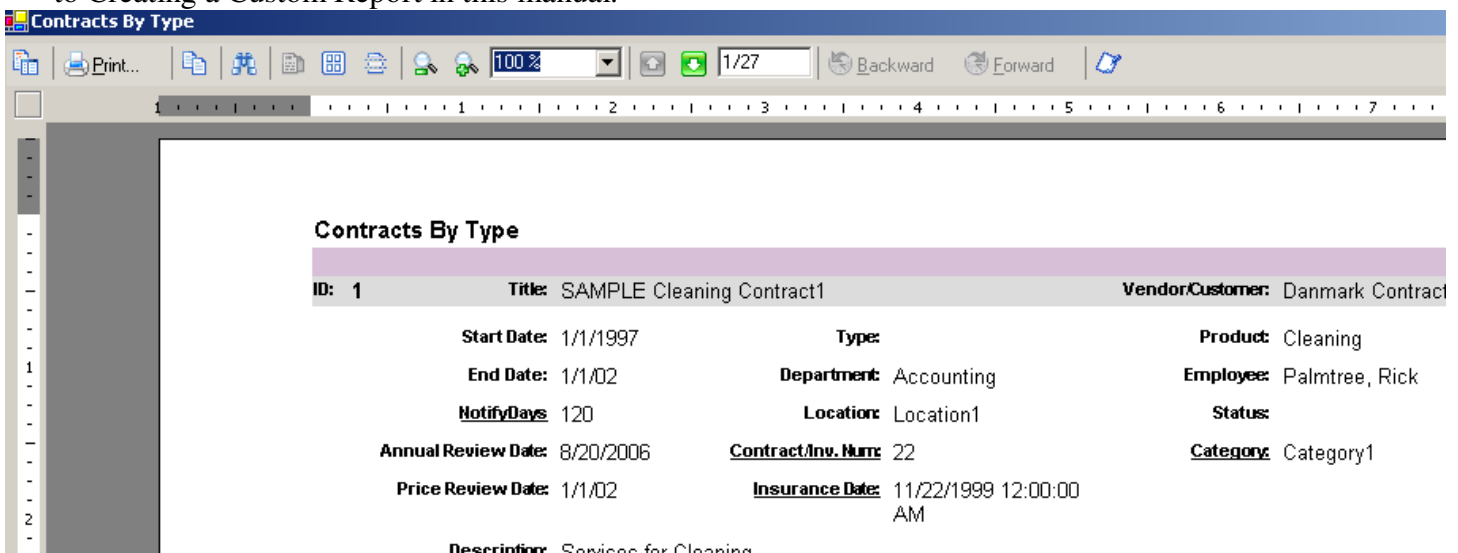
Note: before entering tasks into a contract, be sure to select the 'Save Data' button on the contract entry screen.

From the contract add or edit screen, select the Financials tab (seen above) to enter or edit financial tracking information for a particular contract. This enables a user to track Income, Expense or Hourly Tracking for a particular Contract go to the Contract you would like to edit or add transactions to and select the Financials tab. The form above will appear. Enter each line item in the entry boxes seen above. Be sure to select the 'Add' button seen above. The totals will appear at the bottom. Note: This can be found at the top of the Contract Form.

# Reports and Reporting



- S
1. To run or view a standard reports, select a report from the Report menu.
  2. Next, select corresponding report submenu and report name (seen above). Note: A default printer must be specified before viewing reports from the Printer settings in the user's Windows Control Panel..
  3. The Report Page allows the user to view the selected report, print the report by selecting the printer icon, and find specified text by selecting the binoculars icon. (seen below)
  4. There are a number of standard reports included in the System. To create a custom report, please refer to Creating a Custom Report in this manual.



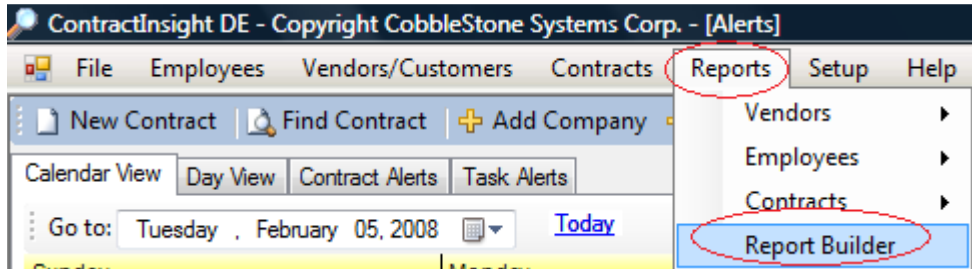
S

# Contract Insight Report Builder

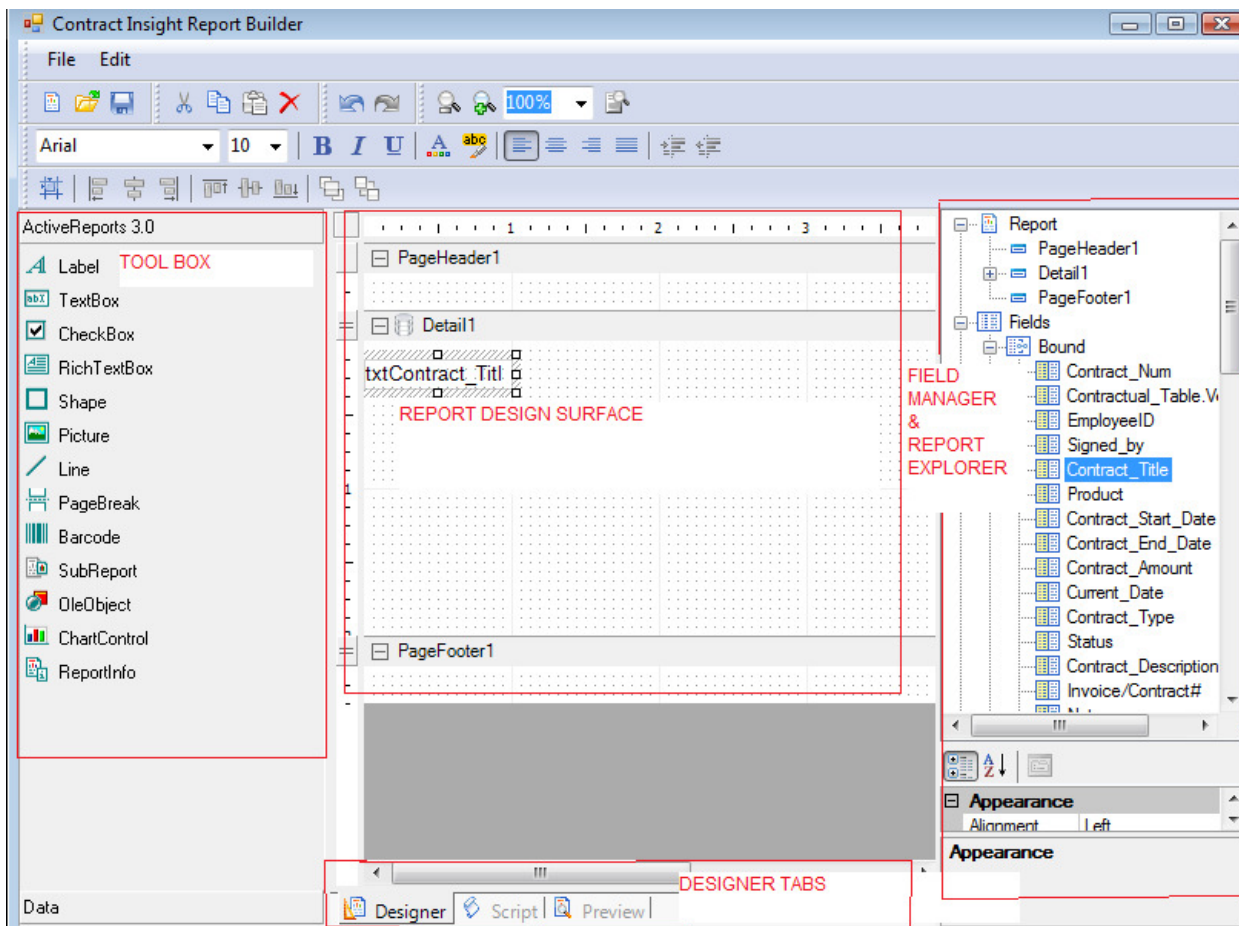
## Customized Reports with Report Builder

Contract Insight comes with a full Report Writer tool entitled Contract Insight Report Builder. Report Builder is a very powerful end-user reporting tool and some reporting experience will be helpful. Knowledge of MS Access Reporting or Crystal Reports will be helpful, as to the concepts of Report Builder are very similar. This document will not cover all features of the Report Builder, however, a good summary is provided below.

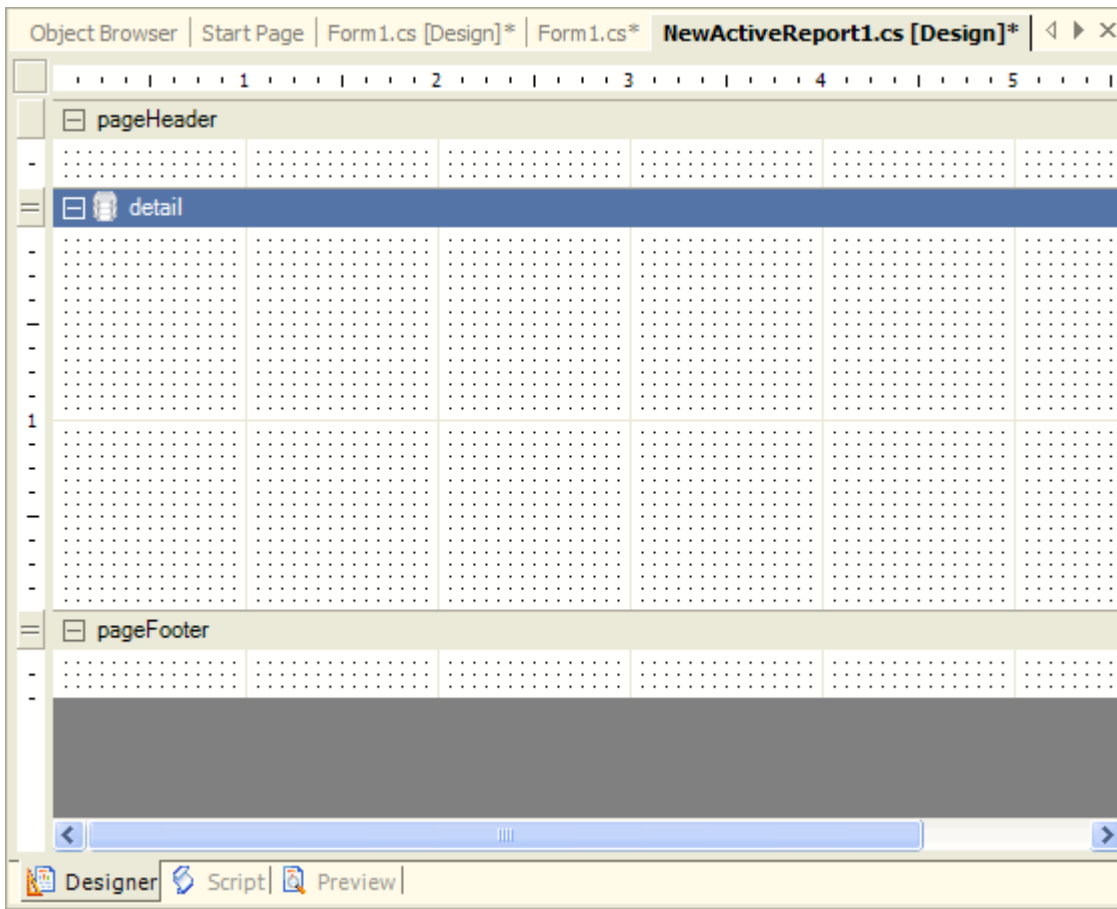
Upon launching Report Builder from the Reports menu, the report designer page will be load and pre-set with the Contract Data source.



With its various tools and features the Contract Insight Report Builder offers great flexibility in constructing report projects.



## Report Designer Section:

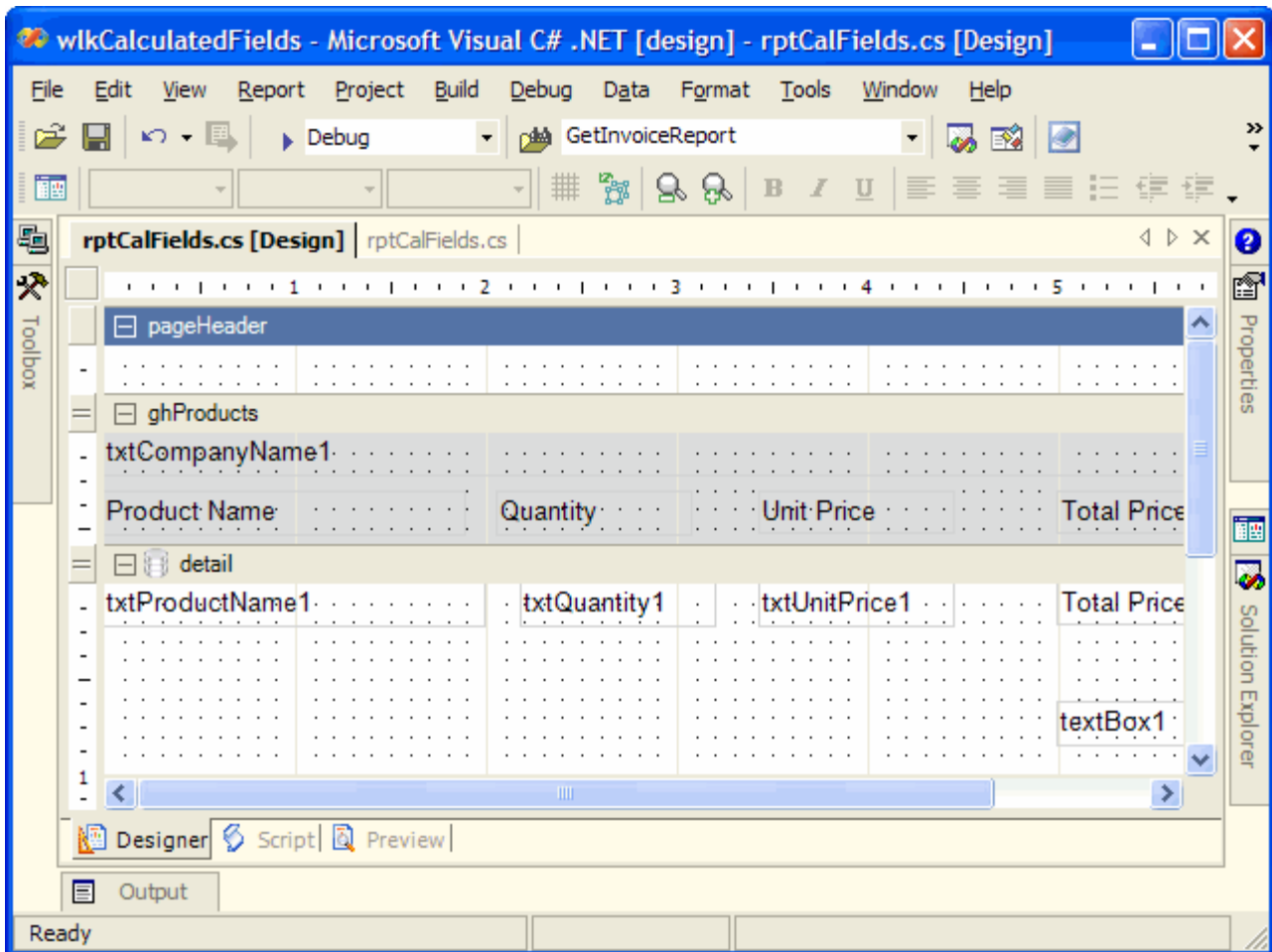


The report design surface is made up of the following base components:

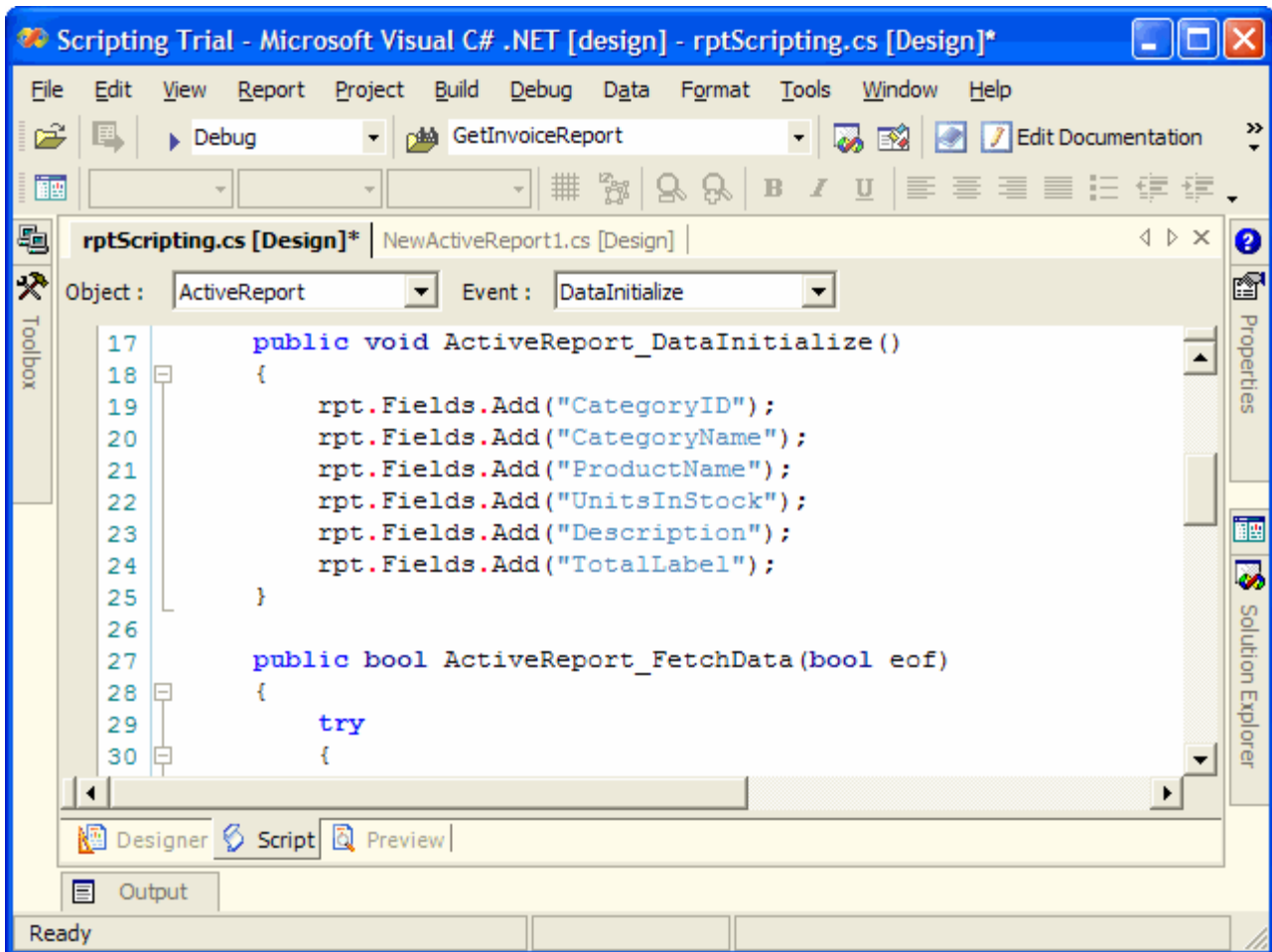
1. **PageHeader section**--This section can be used to print column headers, page numbers, page titles, or any information that needs to be printed once at the top of each page. Bound controls in the PageHeader or PageFooter are not supported. The data in such controls may not be in synch with the data displayed in other sections on the page.
2. **Detail section**--This section is the body of the report that prints once for each record in the data source.
3. **DataSource icon**--This control can be used to connect the report's data source settings to an existing data source
4. **PageFooter section**--This section can be used to print page totals, page numbers or any other information that needs to be printed once at the bottom of each page.
5. **Designer/Script/Preview tabs**--The Designer and Script tabs can be clicked to toggle between design and script views, while the Preview tab allows for a fully functional design-time preview of how a report will look and behave at run time.

The designer tabs located at the bottom of the Report Builder design surface allow you to quickly access various aspects of Report Builder. The Report Builder designer is equipped with three tabs, the Designer tab, the Script tab, and the Preview tab.

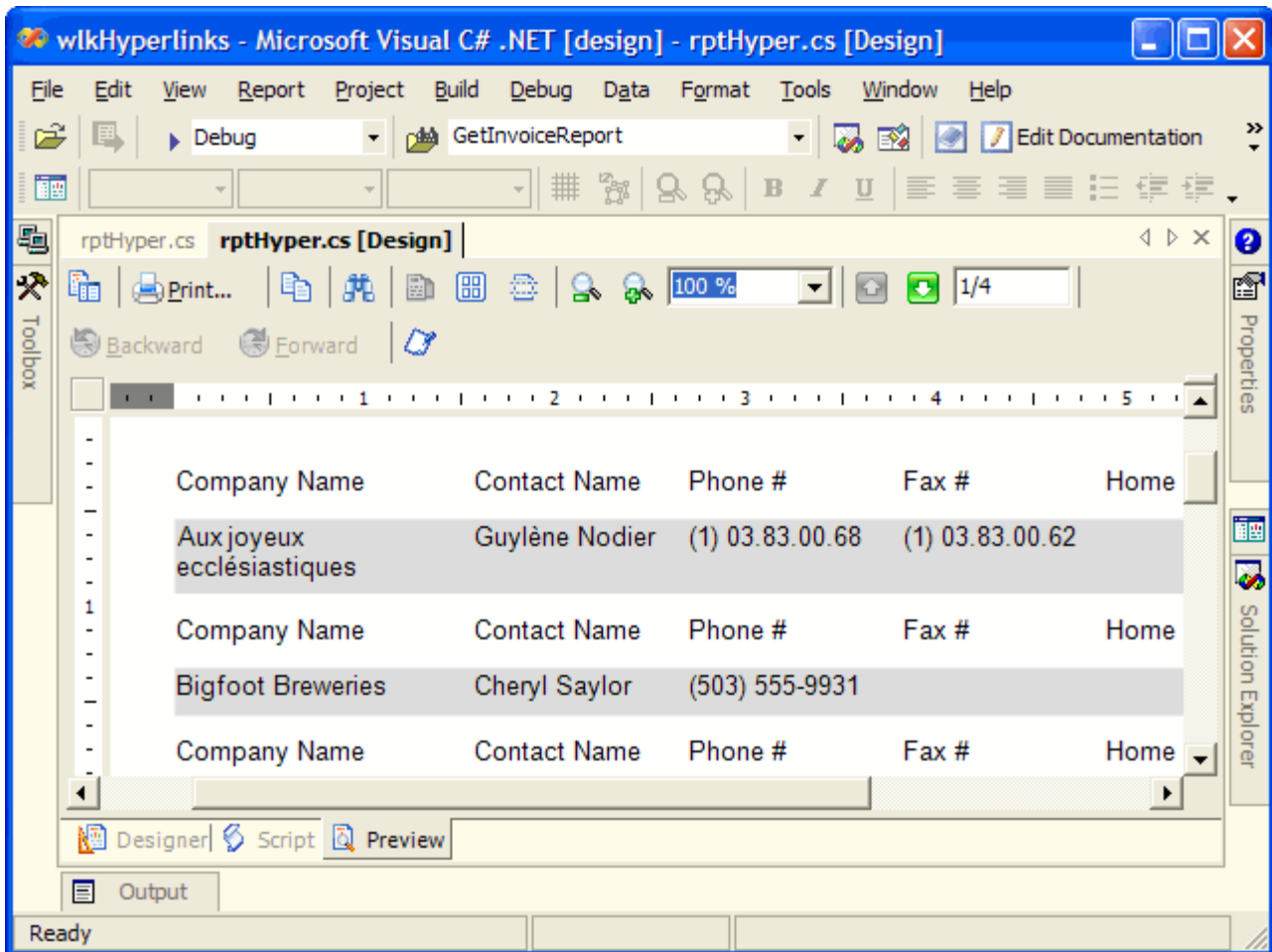
- **Designer Tab:** By default, when you create or open a Report when the designer tab is selected. While in this tab of the Report Builder, you can perform all design-time and run-time functions associated with your report, such as creating a layout, binding to data sources, creating event-handling methods, and more.



- Script Tab:** By selecting the Script tab, you open the script editor, which gives you the ability to easily and quickly add scripting to your report. The script editor contains two comboboxes that allow you to select any section of the Report Builder and all events associated with that section. When you select a section and an event, the script editor generates a method stub for the event.

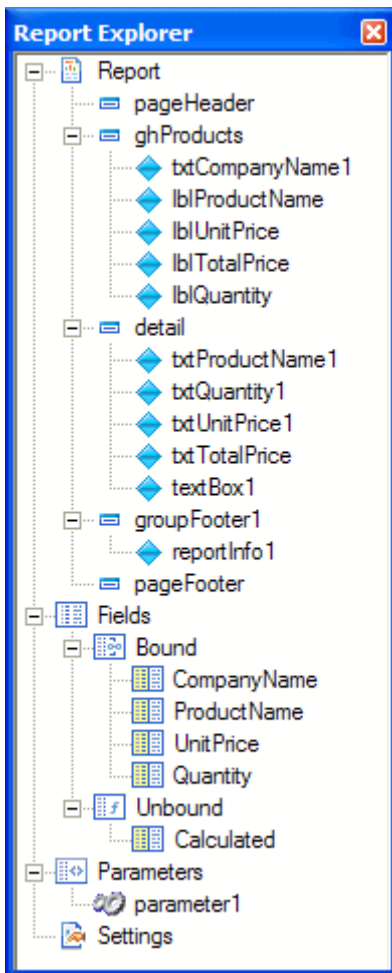


- **Preview Tab:** The Preview tab allows you to quickly view what your report looks like at run time without needing to actually run your project. This makes it easy to quickly see the run-time impact of changes you make in the designer or the code-behind. To gain a report preview, toggle from the Designer or Script tab to the Preview tab.



In Report Builders the Report Explorer serves as the information focal point for your report. From it, you can gain a quick overview of the elements that comprise the report, remove individual controls, add parameters and calculated fields, change report settings, bind data fields to textbox controls, and modify properties and report behavior via the Properties grid.

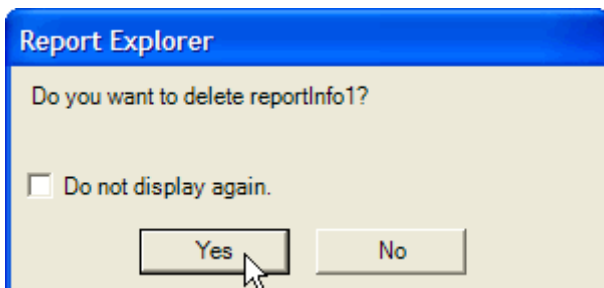
The Report Explorer lays out in one place the sum total of the elements contained in your report.



The following demonstrates how you can quickly modify a report using the Report Explorer.

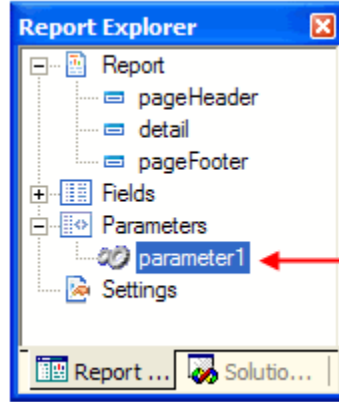
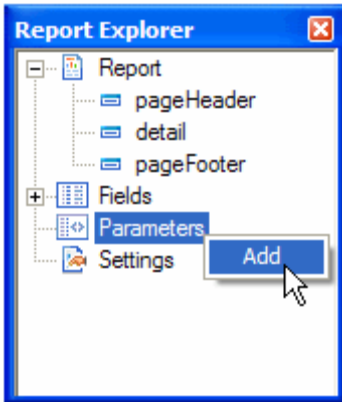
### To remove individual controls

1. In the Report Explorer, expand the tree that contains the the control you wish to remove. For example, if you want to remove a ReportInfo control from a group header, expand the group header that contains the control.
2. Right-click on the control and select **Delete** from the shortcut menu.
3. Click **Yes** in the Report Explorer dialog to confirm your decision.



### To add parameters

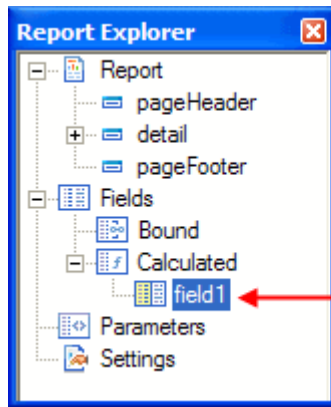
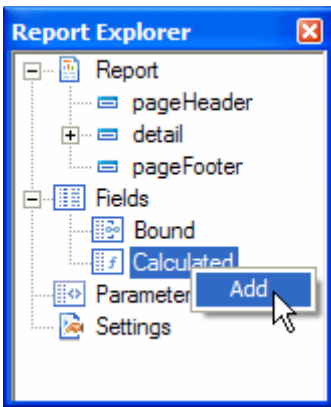
1. In the Report Explorer, right-click on the **Parameters** node.
2. Select **Add** from the shortcut menu.
3. Set any desired properties or events for the parameter in the Properties grid.
4. Drag the parameter from the Report Explorer onto the design surface of your report. This will create a textbox object that is bound to the parameter.



New Parameter

### To add calculated fields

1. In the Report Explorer, expand the **Fields** tree.
2. Right-click on the **Calculated** node.
3. Select **Add** from the shortcut menu.
4. Set any desired properties or events for the field in the Properties grid.
5. Drag the field from the Report Explorer onto the design surface of your report. This will create a textbox object that is bound to the field.



New Calculated Field

### To bind data fields to textbox controls

1. In the Report Explorer, select the data field you want to bind to a textbox control.
2. Drag the field onto the design surface of the report. A textbox control is created and bound to the field, which is reflected in the textbox's **DataField** and **Name** properties. For example, if you dragged a field named "EmployeeID," the **DataField** property of the textbox is set to **EmployeeID** and the textbox is named "txtEmployeeID1."

### To modify properties and report behavior

1. In the Report Explorer, select the report element you want to modify. The Properties grid displays all available properties and events for the element.
2. In the Properties grid, change any properties or events to implement the changes.

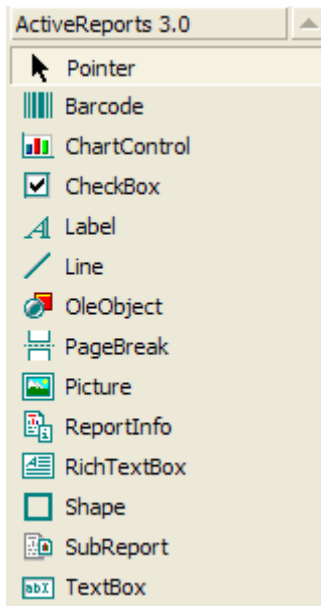
## Formatting a Report



The Report Builder formatting toolbar is made up of the following components:

- Font--Sets the typeface of the selected label, checkbox, or textbox control
- Size--Sets the font size of the selected label, checkbox, or textbox control
- Zoom Out--Incrementally reduces the magnification level of the design surface
- Zoom In--Incrementally increases the magnification level of the design surface
- Bold--Sets the bold typeface on or off
- Italic--Sets the italic typeface on or off
- Underline--Sets the underline typeface on or off
- Align Left--Aligns the text left in the control area
- Align Center--Aligns the text centered in the control area
- Align Right--Aligns the text right in the control area
- Justify--Justifies the text in the control area
- Bullets--Adds bullets to the text in the RichText control area
- Decrease Indent--Decreases the indent of the text in the RichText control area
- Increase Indent--Increases the indent of the text in the RichText control area

toolbox displays a variety of controls available for use in ActiveReports. The items available from the toolbox change depending on the designer currently in use.



### To access the ActiveReports toolbox

1. Open a Visual Studio project.
2. Add an ActiveReport to the project.
3. Click on **View > Toolbox**.
4. Click on the *ActiveReports 3.0* tab.

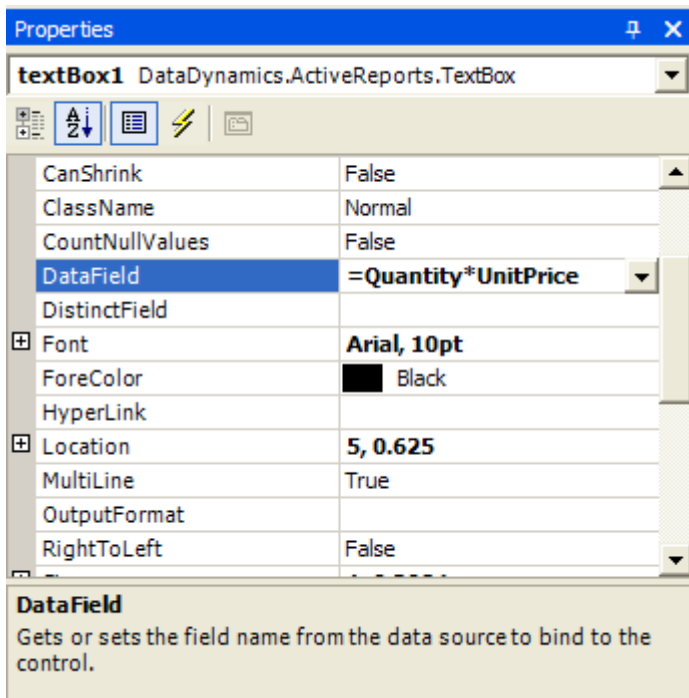
The Reports toolbox is made up of the following components:

- Pointer--Allows you to select controls or sections of the report
- Barcode--Allows you to insert an Reports Barcode control

- ChartControl--Allows you to insert a chart in any of a variety of styles
- Checkbox--Allows you to insert a checkbox, bound to a database field or unbound
- Label--Allows you to insert a new static label control
- Line--Allows you to insert a line control
- OleObject--Allows you to insert an OLE object, bound to a database field or unbound
- PageBreak--Allows you to insert a page break within a selection
- Picture--Allows you to insert an image loaded from a file
- ReportInfo--Allows you to display report info in a number of format strings such as {PageNumber} of {PageCount}
- Textbox--Allows you to insert a textbox, bound to a database field or unbound
- Shape--Allows you to insert a rectangle, circle or square shape
- Subreport--Allows you to insert a Subreport control to link to another report
- RichTextBox--Allows you to insert an RichTextBox control

## Field Expressions

Field expressions can be used in the DataField property to specify textbox output in a report, such as date/time, mathematical calculations or conditional values. Any field expression should begin with the equals (=) sign.



### Using Field Expressions

#### To use a mathematical expression

Change the DataField property for the text box to the mathematical calculation desired.

Examples: =UnitPrice+5

=Quantity-5

=Quantity\*UnitPrice

=UnitPrice/QuantityPerUnit

#### To use a substring

Change the DataField property for the text box to the substring needed. If setting up grouping, change the GroupHeader's DataField property to the same substring.

Example: `=ProductName.Substring(0, 1)`

#### **To use date/time**

Change the DataField property for the text box to the following.

Example: `=System.DateTime.Now.ToString()`

#### **To create a conditional value**

Change the DataField property for the text box to the conditional statement desired.

Example: `=(UnitsInStock > 0)?"In Stock":"Backorder"`

#### **To concatenate fields**

Change the DataField property for the text box to the following.

Examples: `"There are " + UnitsInStock + " units of " + ProductName + " in stock."`

`=TitleOfCourtesy + " " + FirstName + " " + LastName`

#### **To round a calculation**

Change the DataField Property for the text box to the following.

Example: `=(double)System.Math.Round(UnitPrice*UnitsOnOrder,2)`

#### **To use modular division**

Change the DataField Property for the text box to the following to get the remainder (2 in this case).

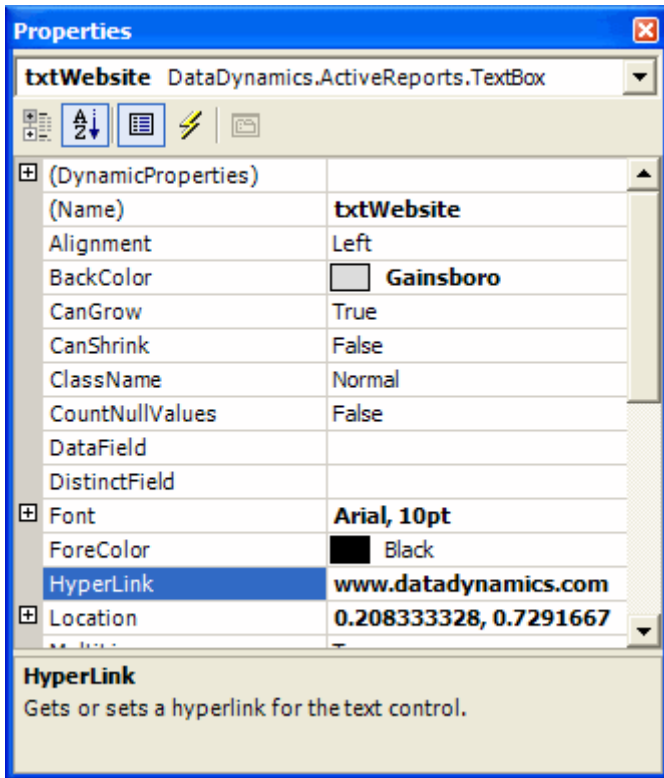
Example: `=22%(5)`

#### **To replace a null value**

Change the DataField Property for the text box to the following to replace nulls with your own value.

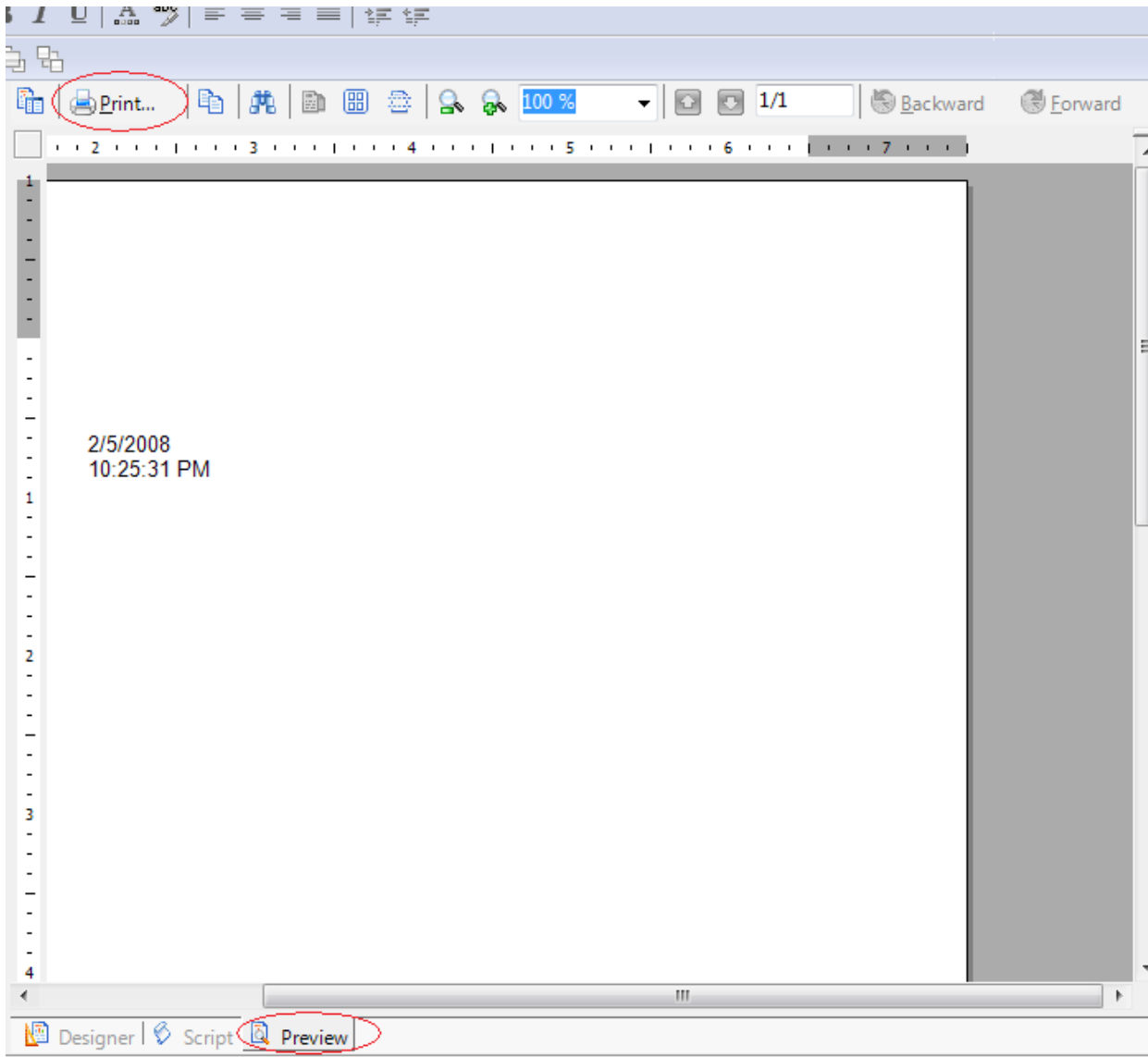
`=(Region == System.DBNull.Value) ? "No region specified" : Region`

To add a hyperlink to a report at design time, click on the appropriate control within the ActiveReport designer and set the HyperLink property for it in the Properties window.



### ***Viewing and Printing a report***

To view or print a report, select 'Preview' tab at the bottom of the report designer, and select the print icon to print (seen below):



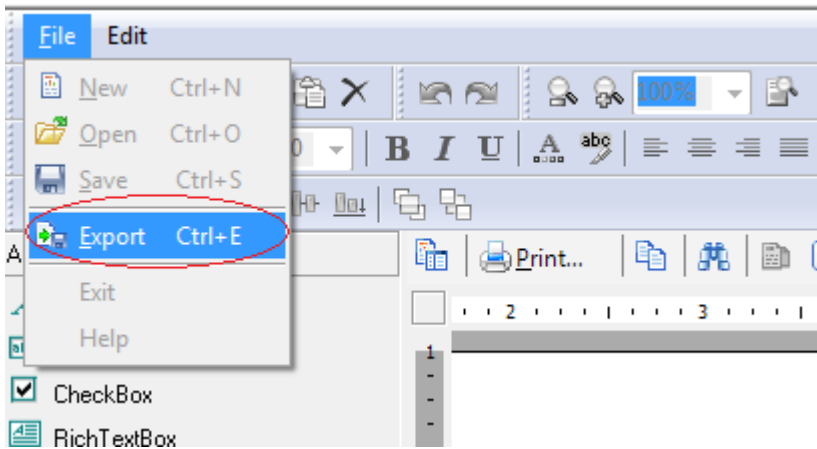
## ***Grouping Data in a Report***

### **To group data in a report**

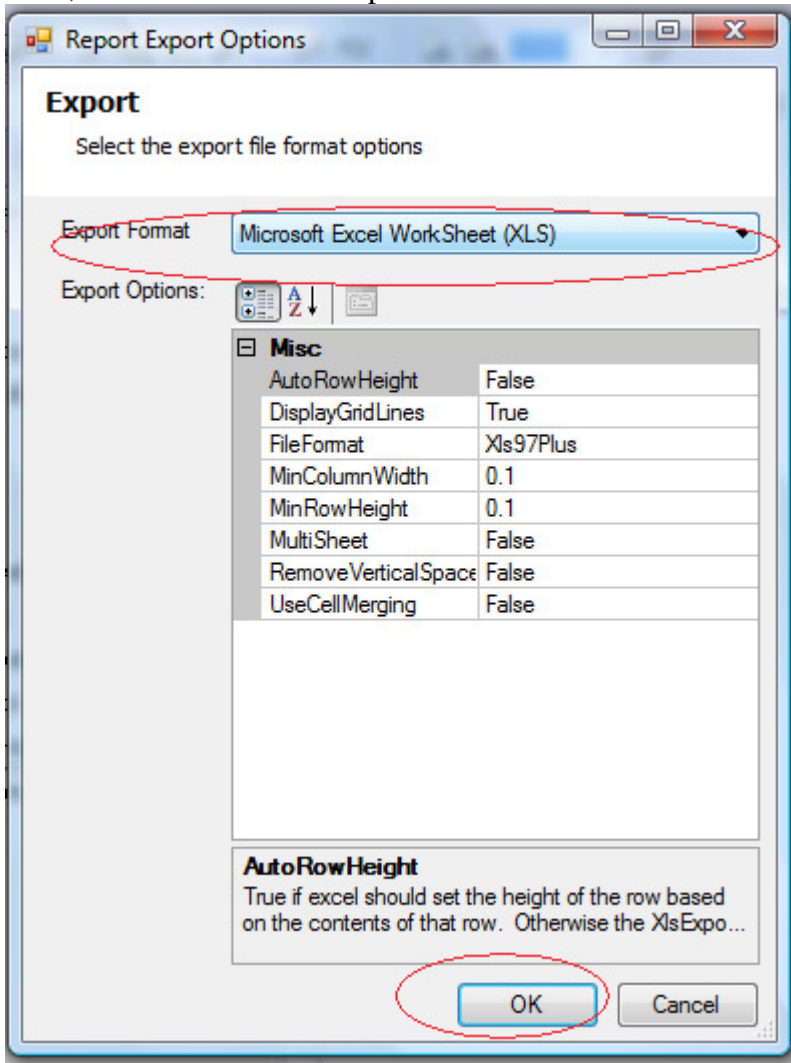
1. Right-click in the Detail section of the report design surface, select **Insert**, and click on **Group Header/Footer**.
2. This will insert a new group header/footer section into your report.
3. In the Properties window for the group header, change the DataField property to the field on which you want your data grouped.
4. Change the name of the group header to reflect the field on which data is being grouped. For example, "ghCategories" would be the name of the group header field with the DataField property of "CategoryID".

### **Exporting a Report**

To export a report to MS Excel and other formats, first preview the report by selecting the 'Preview' tab. Next, from the File menu, select 'Export'.



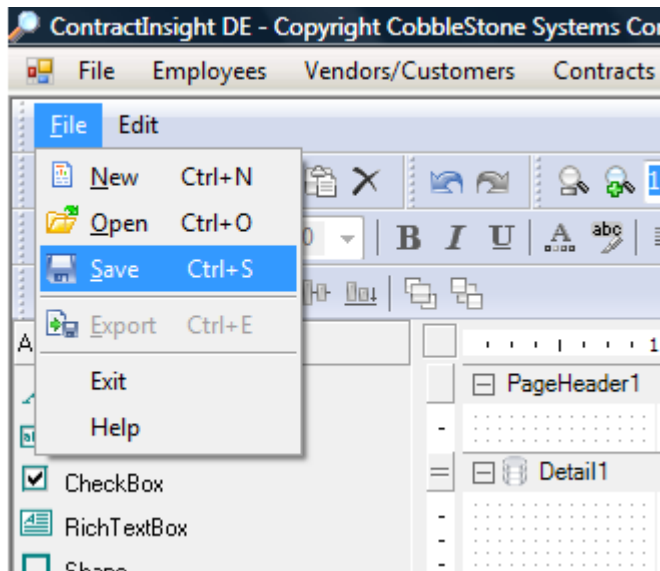
Next, select the format to export to and the file destination.



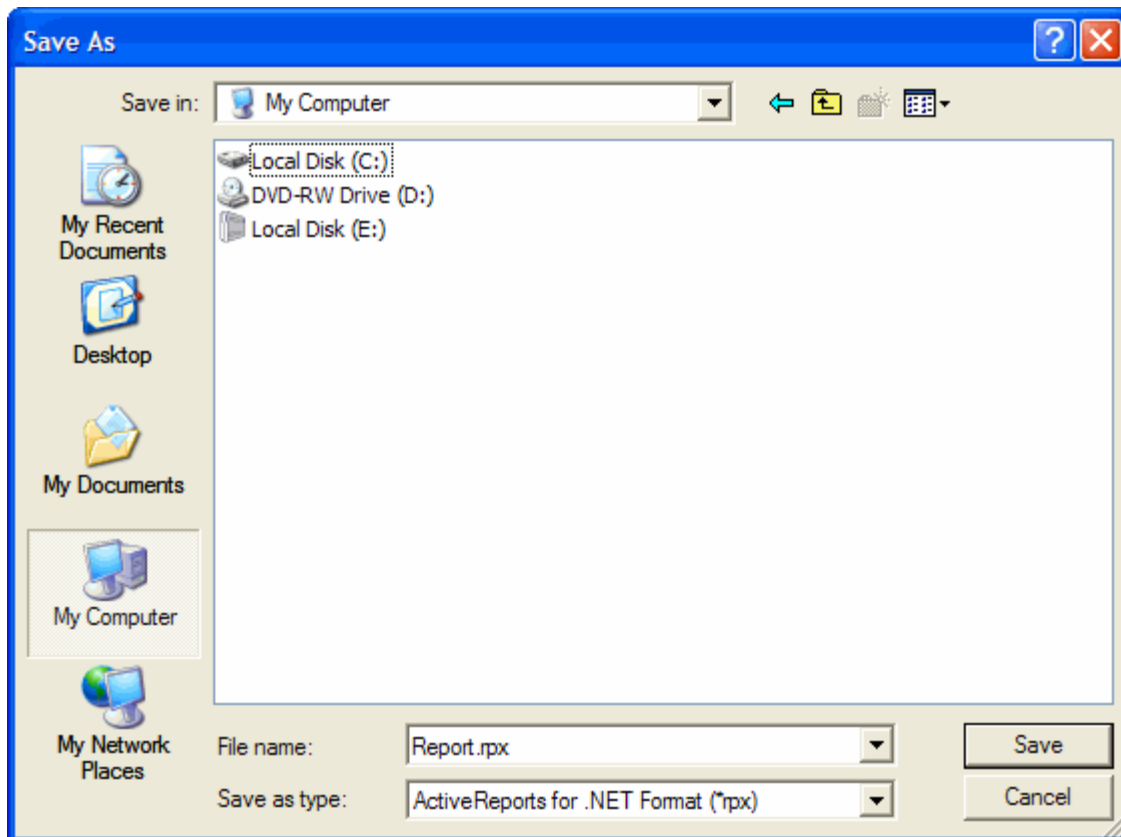
## ***Saving and opening a report***

**The report builder tool enables user to create and save multiple reports. To save a current report as an RPX file**

1. While in the design view, select **Save** from the **File** menu.



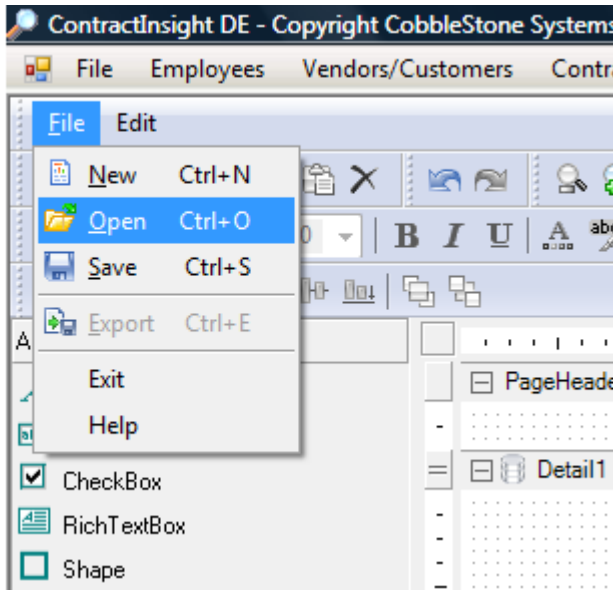
2. Name the file appropriately and select the location in which to save it.



3. Click **Save** to save the selected report layout.

### To load an existing RPX file

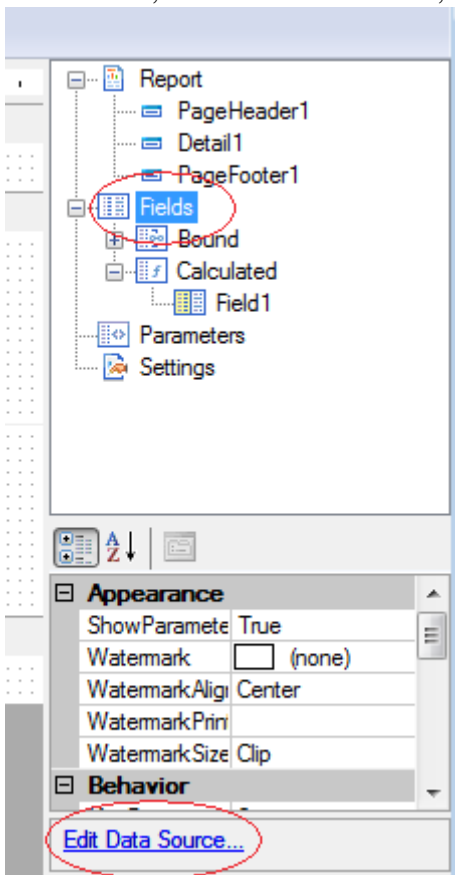
1. While in the Report Builder, click **File > Open**.
2. Select the RPX file from the appropriate location.
3. Click **Open** to load the selected report layout.



4. The saved report will appear in the designer section.

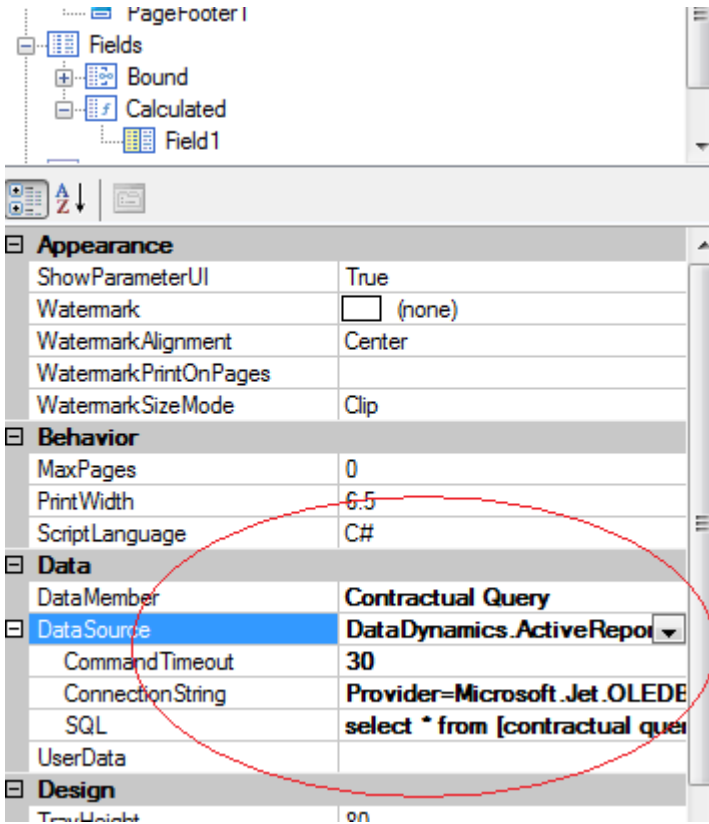
### ***Connecting to the database and other data sources:***

The report designer is automatically connected to the contract database. However, the report builder enables a report to be connected to the Contract Insight directly, which is normally located in the `C:\Program Files\CobbleStoneSystems\ContractInsightDE` folder. Your installation path may vary depending on the path selected during installation. The report builder may also be connected to any other datasource for reporting. To edit the data source, select the Fields item, and then select 'Edit Data Source' seen below.



- Data Source

The Data Source option allows access to add Data Source parameters or modify existing Data Source settings.

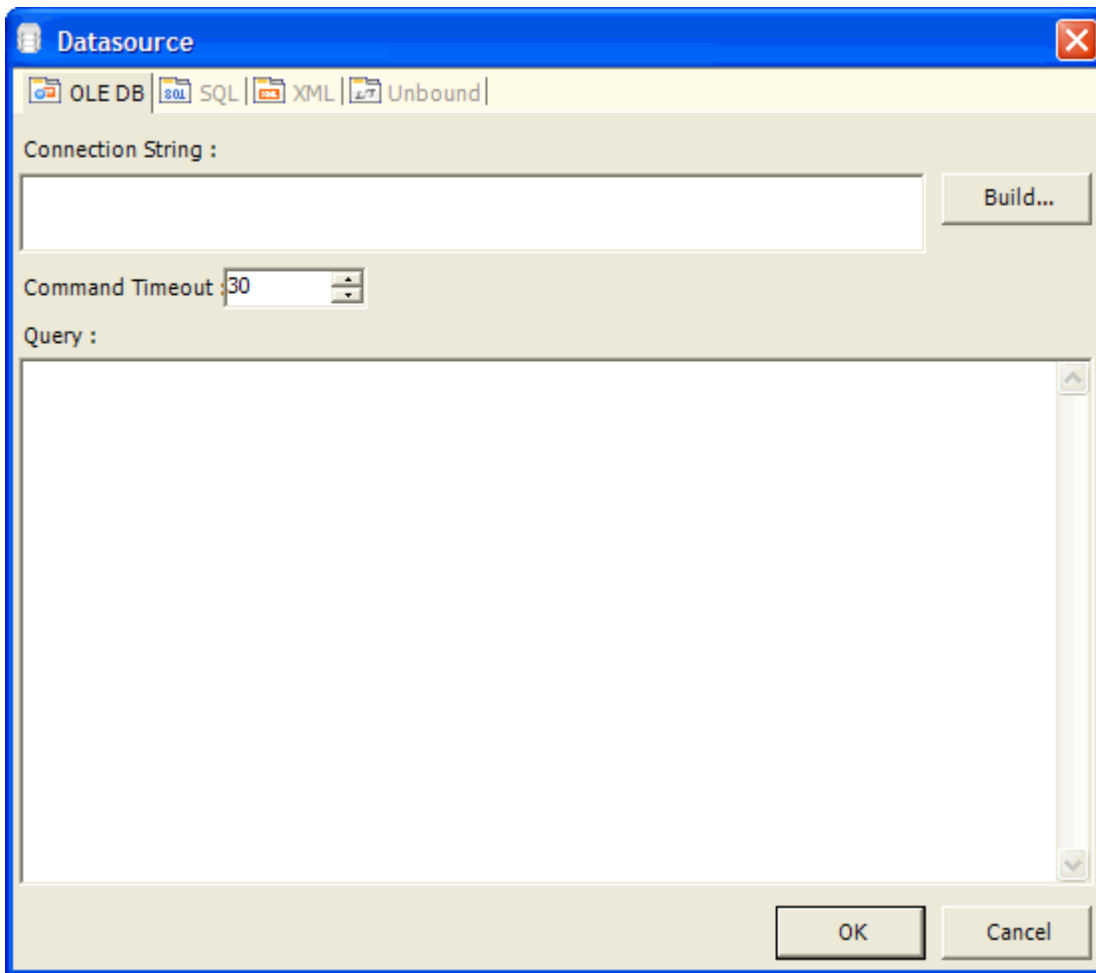


Report Builder makes it easy to bind your report to other data sources by using the gray **DataSource icon** located in the **Detail section** of the report design surface or by accessing the DataSource dialog from the Report Settings menu.



### To use the DataSource icon

1. From the report design surface.
2. Click on the gray DataSource icon in the Detail section of the report to open the Datasource dialog.
3. You will then be prompted to select your data source, connection string, and query.



#### To connect to Microsoft Access using Jet 4.0

1. Click on the gray report DataSource icon in the Detail section to open the Datasource dialog.
2. Select the OLE DB tab.
3. Click on **Build**.
4. Select "Microsoft Jet 4.0 OLE DB Provider" and click **Next**.
5. Enter a database name or Click the ellipsis button to browse for the access path to a database.
6. Click **Open** once you have entered a database name or selected the appropriate access path.
7. Click **OK** to continue.
8. Enter a SQL statement in the Query box (e.g. "Select \* from products").
9. Click **OK** to return to the report design surface.

#### To connect to SQL Server


1. Click on the gray report DataSource icon in the Detail section to open the Datasource dialog.
2. Select the SQL tab.
3. Click on **Build**.
4. Select "Microsoft OLE DB Provider for SQL Server" and click **Next**.
5. Select a server.
6. Chose Windows integrated security or a specific username and password.
7. Choose the database for connection and click **OK**.

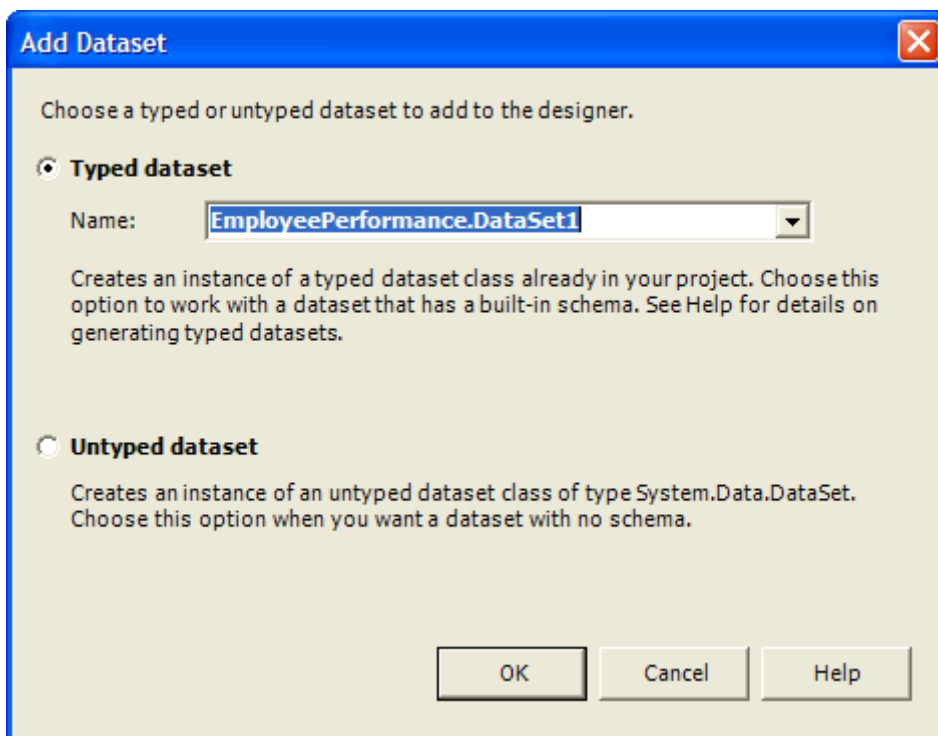
8. Enter a SQL statement in the Query box (e.g. "Select \* from products").
9. Click **OK** to return to the report design surface.

### To connect to an XML database

1. Click on the gray report DataSource icon in the Detail section to open the Datasource dialog.
2. Select the XML tab.
3. Click the ellipsis button beside *File URL* to browse for the access path to Customer.xml.
4. Click **Open** once you have selected the appropriate access path.
5. In the *Recordset Pattern* field, enter a pattern (e.g. "//ITEM").
6. Click **OK** to return to the report design surface.

To use a dataset at design time, add the necessary data controls to the Report, set the report's DataSource and DataMember properties, and bind the report's controls to the corresponding data fields

-  If your project already contains a dataset that you want to use within the Report designer, drag the DataSet object from the Data tab of the toolbox onto the report surface. This will open the **Add Dataset** dialog. To add your dataset, select the **Typed dataset** option then choose your dataset.



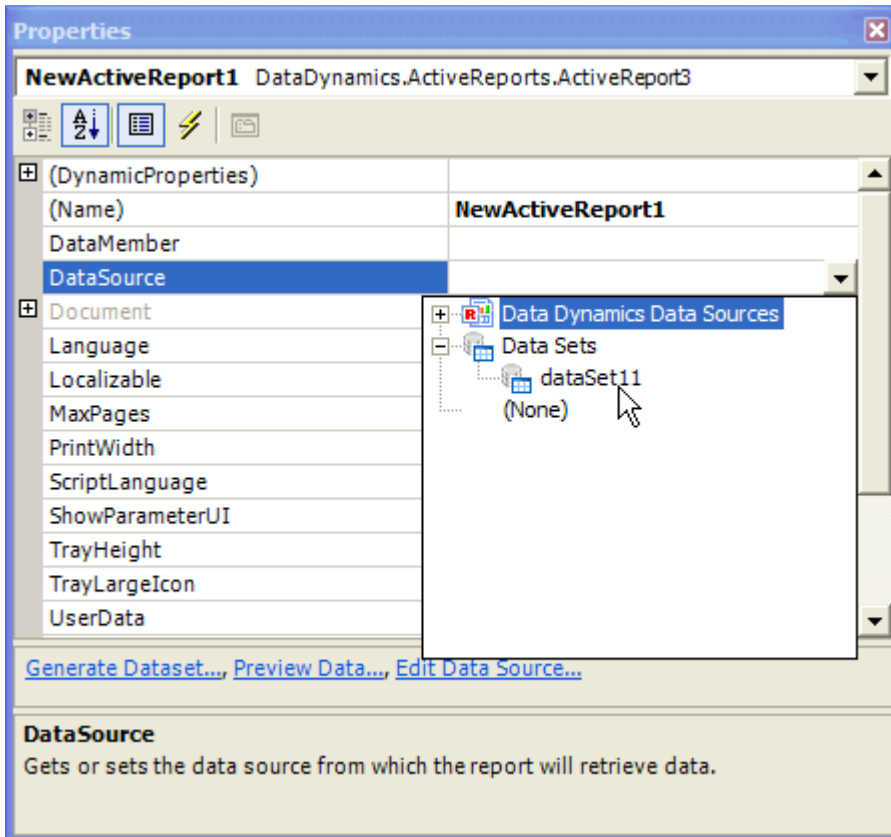
### To add data controls to the Report

1. While in an Report, click the Data toolbox tab. Select any available DataAdapter object and drag it onto the report surface; the Data Adapter Configuration Wizard will open and you will see a visual representation of the DataAdapter object in the Reports component tray.
2. Click **Next**.
3. Click **New Connection**, which will open the Data Link Properties dialog, and select the "Provider" tab.
4. Select the appropriate provider.
5. Select the "Connection" tab and enter or browse for the path to the desired database file and click **OK** to close the dialog and return to the Configuration Wizard.
6. Click **Next** twice, enter the appropriate SQL Select statement and click the **Next** button again.

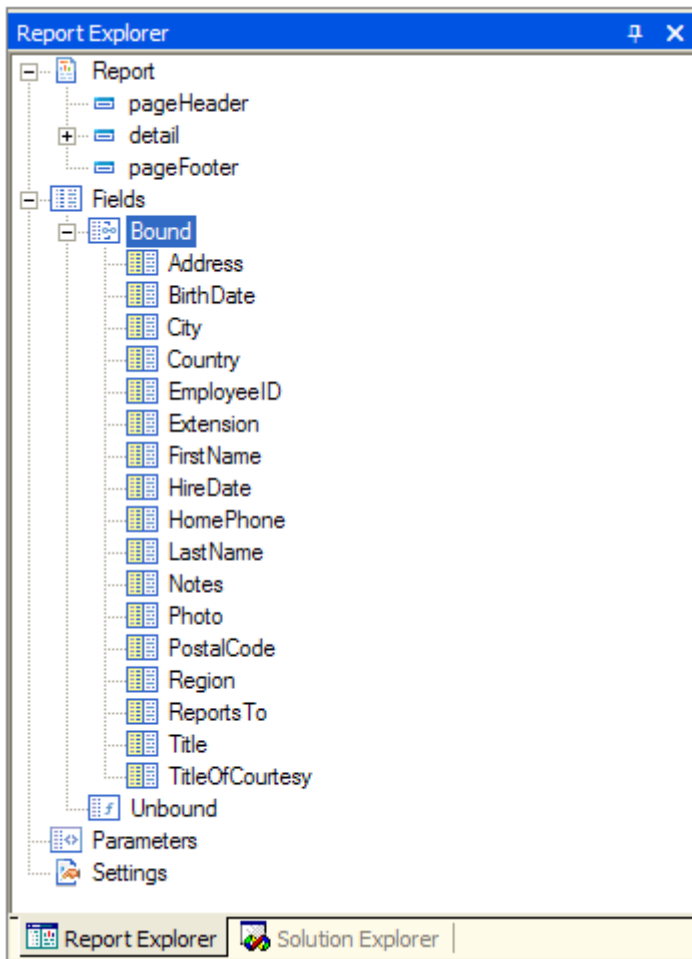
7. Click Finish to close the wizard. A connection object will now reside with the DataAdapter object in the ActiveReports component tray.
8. To generate the dataset, right-click the DataAdapter object, click on "Generate DataSet," select "Add this dataset to the designer," and click **OK**.

### To set the report's DataSource and DataMember properties

1. Click in the gray area of the design area to select the ActiveReport.
2. From the Properties grid, set the DataSource property to the newly generated dataset and the DataMember to the DataTable.



After setting the report's data source, all bound fields appear under the Bound node, which is accessed by expanding the Fields node in the Report Explorer.



**To bind the report's controls to the corresponding data fields**

## ***Adding Custom Code to a Report***

**Use the Script tab and AddCode method to inject code into the script.**

The *AddCode* method allows actual code segments to be added to the script at run time. This is useful for allowing secure information, such as a database connection string or SQL query string, to be used inside the script without having to save it into the RPX file.

```
'Visual Basic
```

```
Public Function addThisCode() As String
```

```
    Dim sCode As String = "Public Function ShowACMessage() As String" _
```

```
    + Environment.NewLine + "ShowACMessage = ""my Added Code"" _
```

```
    + Environment.NewLine + "End Function"
```

```
    addThisCode = sCode
```

```
End Function
```

```
Private Sub rptAddCode_ReportStart(ByVal sender As Object, ByVal e As System.EventArgs) _
```

```
    Handles MyBase.ReportStart
```

```
    Me.AddCode(addThisCode())
```

```
End Sub
```

```
'VB.NET Script
```

```

Public Sub Detail1_Format()
    CType(rpt.Sections("Detail1").Controls("TextBox1"), TextBox).Text = ShowACMessage()
End Sub

```

## Adding Parameters to a Report

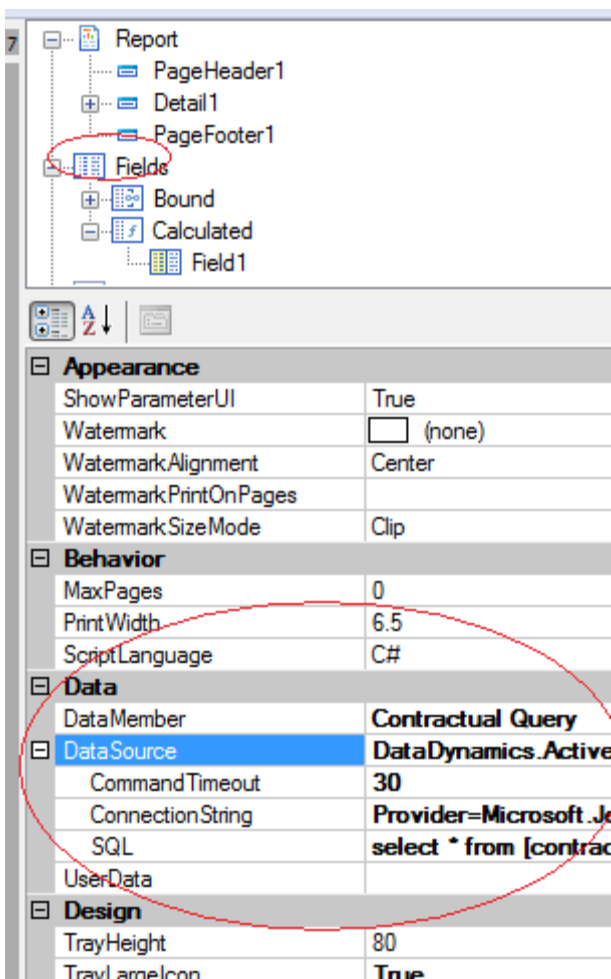
In Report Designer, the Parameters dialog can be used to prompt for user input when reports are generated. If you add "<%FieldName | PromptString | DefaultValue | Type %>" to the report's SQL string, the Parameters dialog appears when the report opens.

This walkthrough illustrates the basics of using parameters in simple reports.

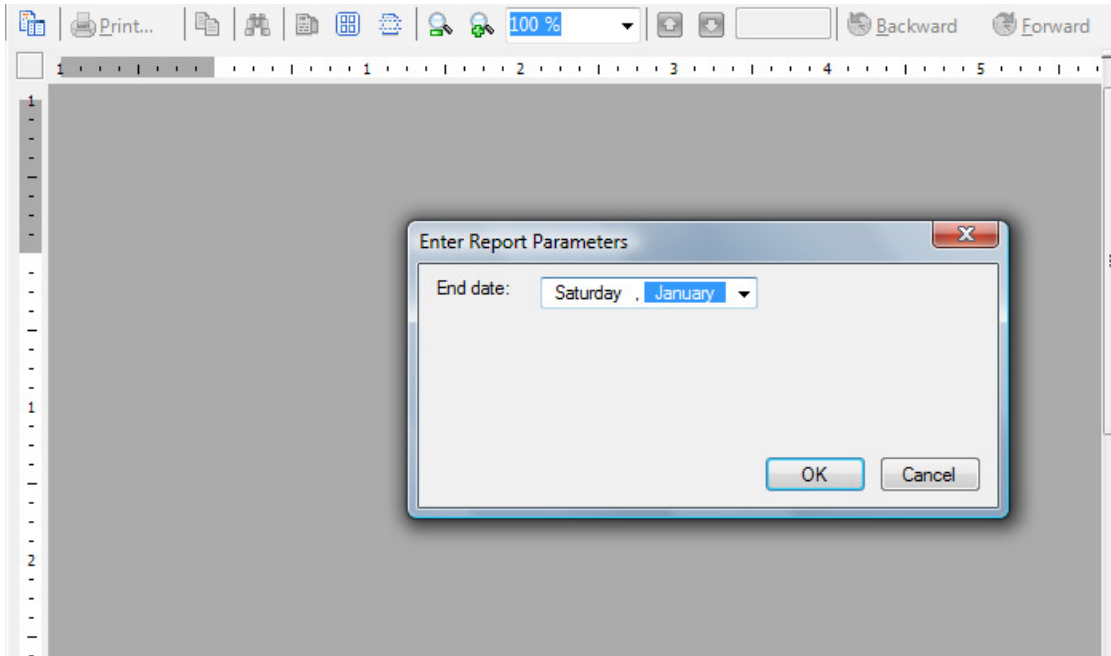
### Connecting the report to a data source

#### To connect the report to a data source

1. Open Report builder, click on the gray report DataSource icon in the Detail section to open the report DataSource dialog.
- 2.



3. In the SQL query field, type "SELECT \* FROM [contractual\_table] WHERE contract\_end\_date = # <%Date|End date:|1/1/1994|D%> #".
4. Click the report design surface to return to the report design surface.
5. To preview or print the report, select the "Preview" tab



# Custom Reports Using Microsoft Access

## Items Required:

1. Microsoft Access installed on your computer.
2. The location of your "Contract.mdb" file. The file will be either on your hard drive or on the network.
3. The appropriate network permissions. Contact your network administrator for help.

## Creating a Custom Report:

1. Open MS Access, create a new database. Select a name for your new database. Remember the name, you will use this database as your interface to the contract data.
2. In MS Access select "File" from the Menu.
3. Select "Get External Data", and then select "Link Tables".
4. Browse to the location of your "Contract.mdb" file. By default the file is stored in the following location "c:\program files\Contract Management Software\Contract.mdb" (other the proper directory for your installation, please contact your IT help staff for more information).
5. Select the "Contract.mdb" file.
6. Select the "Select All" button. Next, select "OK". The links to the tables should appear in your new database.
7. Next, import the "Contractual Query" by selecting "Get External Data", "Import Data" from the Menu.
8. Browse to the location of your "Contract.mdb" file.
9. Select the "Contract.mdb" file.
10. Select the "Queries" tab from the top of the form.
11. Select the "Contractual Query". Next, select "OK". The queries will now be imported to your new database.
12. You can now use the Microsoft Access Report Writer by selecting the "Reports" Tab and then selecting the "New" button.
13. Refer to your MS Access documentation or the MS Access help file to create your own custom reports.
14. Create a Report with an MS Access Report Wizard:
15. In the Database Window of your new database, click the Reports Tab.
16. Click New.
17. In the New Report dialog box, select the wizard that you want to use. A description of the wizard appears in the left side of the dialog box.
18. Click the table or query that contains the data you want to base your report on.
19. Click OK.

If the resulting report doesn't look the way you want, you can change it in Design view.

## Exporting Data

The System allows authorized users to export data to analyze in third party tools such as Microsoft Excel or MS Access. To export data, follow the same instructions found in the Custom Report section of this manual. Once, you establish a linked table to the Contract.mdb file, you may use Microsoft Access to export data. Refer to the Microsoft Access help files for more information.

## System Limitations

The desktop edition is limited to ten concurrent users and has a total database limitation of 1 GB. However, this means that you can track as many contracts as you wish until the database reaches 1 GB in size. CobbleStone System's enterprise edition does not have a limitation on the database size. To contact CobbleStone Systems to upgrade to the Contract Management Enterprise Edition (at a discounted price) see the information below.

## Upgrading to the Contract Enterprise Edition

CobbleStone offers a many more features in their Contract Management Enterprise Edition. To learn more about how you can have unlimited scanned documents, attached files, customized fields, customized reporting, e-mail alerts, multiple levels of security, contract creation and templates, tasks and workflow, vendor negotiation and more, please visit our website at:

<http://www.CobbleStoneSystems.com>

## Support and General Questions Contact Information

If you have a question about our products or would like a demo and pricing please contact us.

Telephone: 1-866-330-0056

Electronic mail: [info@CobbleStoneSystems.com](mailto:info@CobbleStoneSystems.com)

Support e-mail: [support@CobbleStoneSystems.com](mailto:support@CobbleStoneSystems.com)

Website: <http://www.CobbleStoneSystems.com>

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