# **Custom Reporting Fields**

Custom reporting fields enable users to capture, analyse, and report on data that isn't already included in our Contract Management module. Enhance your team's experience with VendorPanel by driving more informed decision-making and better insights into business performance.

Follow the simple steps below to enable Custom Reporting Fields.

## Setting up questions

On the contracts and vendor settings form there is a new section called Custom Reporting Fields. Enable custom reporting fields" is off by default. It is advised that you create your questions before turning on this setting (which can be done by clicking the "View/Setup custom reporting fields" button).

Custor	m Reporting Fields
i	This allows for the capture of custom reporting fields on contracts. These fields can be completed as part of the setup process and managed from the details view on a contract.
View	v/Setup custom reporting fields
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You have the option to mandate if the Custom Reporting Fields are on all contract types as part of setup or just on some contract types. All contracts will have custom reporting fields available once the contract is active.

#### Option 1: Enable setup for all Contract types

Custom Reporting Fields		Questio	on		
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View/Setup custom reporting fields		Local supplier a	cones		
Enable custom reporting fields				Linique ID: h6er87e6-418e-40e5-e20e-e2e4066	682d7h
Contract Type	Required on setup			Unique ID. DUECO/E0-4106-4585-8208-6264000	002070
Construction	FALSE	A .			
Contract of Purchase	TRUE	Answer			
Contract of Sale	TRUE				
Example Contract Type	TRUE	Answer type	Dropdown		~
Funding Agreement	TRUE	, menter type			
Grant Agreement	TRUE				_
Infrastructure	TRUE	Guidance docu	ments included	Allow document upload	
17 items	1-20 ¥ Expor	t 0 0			
Enable on setup for all Contract types		Response man	datory		-

Option 2: Select a specific contract type. Under 'Other setup details' enable "Custom Reporting Fields"

c	Other se	tup details		
Y	'ou may sp	pecify which additional information	i is able to be added during the setup process.	
E	nabled	Information type	R	efresh List
(		Custom Reporting Fields	)	
		Risks	•	

## PRO TIP:

On an individual field, if you enable "Response mandatory" then users will be required to fill it in before completing contract set up.

# **Entering Data**

On contract setup there will be a new section called Custom Reporting Fields under the Other Details tab. On an individual contract at the bottom of the Details tab there will be a new section called Custom Reporting Fields.

Custom reporting fields		
i Your organisation has some additional information related	d to this contract. Click the below button to fill in	the information.
View/Edit custom reporting fields Refresh		
Custom reporting field	Value	Comments
Local supplier zones	No answer provided	
Supplier best practice principles	ВСМ	

The first time you enter data, clicking the "View/Edit Custom Reporting Fields" button will open up the custom fields popup. Once in the popup, you will be presented with all the questions you may need to answer (questions with a red asterisk\* are mandatory).

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 $Once \ data \ is \ entered \ you \ will \ be \ able \ to \ view \ the \ answers \ without \ opening \ the \ pop-up.$ 

# Adding your Custom Reporting Fields to Tabular Reports

You can add these custom reporting fields to any of your existing tabular reports using the steps below:



In Contracts settings, there is a new section called Custom Reporting Fields. Click on 'View/Setup custom reporting fields'.

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#### In Questionnaire Builder, open the question you want to add to your tabular report.

#### **Questionnaire Builder**

Question Categories			
Categorise questions			
Questions			
Questions requiring a score should use 'dropdown' answers			
Question	Mandatory	Answer Type	
Local supplier zones		Dropdown	
Supplier best practice principles	TRUE	Dropdown	
Procurement method		Dropdown	
Limited Tendering Reason		Multi line freetext	
Number of offers sought	TRUE	Number	
Evaluation criteria and weightings		Multi line freetext	1
		Dropdown	
Significant procurement? (Yes/No)		Yes / No	
Significant procurement? (Yes/No) Was a Local Benefits Test included?			
Significant procurement? (Yes/No) Was a Local Benefits Test included? Ending domestic violence	TRUE	Tabstrip	

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### Open Add to report section and copy the 'code'.

#### Add to report



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#### Go to the tabular report you want to edit and click edit under columns.

Profile Propertie	es 🗸	Profile: Contrac	ts	► Save as P	rofile Tools
Search					
Appearance	^	Add Reco	rd Reload		
Behaviour	$\sim$				
Open Records In Popup?	No	Drag a colum	n header and drop	it here to group by that colu	mn
Page Size	50	View	Status	Start Date	End Date
Refresh Interval (seconds)	0		T	T	T
Common	$\sim$				
	Status, Start Date, Current End Date, Contract Number, Contract Title, Vendor Name, Total Contract	View	Expired	13-Jan-2023	12-Jan-2024
Columns	Value, Department, Contract Manager, Originator Edit	View	Active	12-Dec-2023	11-Dec-2024
Filter	Filtered - click to see more Edit	View	Setup	16-Nov-2023	

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## Click 'Add Advanced' to add a new column and give the column a new name.

Add Advanced	Add Links	Add Local	Add Remote	Remove All
Advanced #10				×
Name	State spec	cific reporting requirement		
Column Definition Filter			Edit	
Width	100			
Aggregate	None			~

Advanced #10						
Name	State specific re	eporting requirement				
Column Definition Filter			Edit			
Width	100					
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Edit Column Definition Filter					×	
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Paste in "cod	e.					
Edit Column Definition Filter				>	<	
Advanced					-	
Text FILTER STRING				;; FULL SCREEN (Ctrl + F	11)	
1 STEP TO CHILD [Questionna 2 ON [To].[Supplementary Da	ire] ta Type] FAST EOUAL TO '	'Contract Data'				
<pre>3 AND [To].[Question] = 'Lo 4 GET LAST([Answer])</pre>	cal supplier zones'					
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Now that you've created your Custom Reporting Fields and presented your Tabular Reports you will enhance your team's experience with VendorPanel by driving more informed decision-making and better insights into business performance.

Want to learn more about Custom Reporting Fields?

Get in touch today!



will select 'Save'.