

Client Data System

Volume 120: Things Done Report

The Things Done Report displays a record of additions, modifications, and deletions of records in CDS.

To run the Things Done Report:

- From the main screen in CDS, select **Reports** in the main menu and then select **Things Done Report**.
- Select report options in the Things Done Report Options window.

Things Done Report Options 🛛 🔀						
Date Range From Thru	09/28/2007					
Special Date Ranges Year to Date Month to Date	● Last 7 Days ● Last 30 Days					
User Name	DEMO 🔽					
ОК	Cancel Help					

Figure 1: The Things Done Report Options window.

• After selecting options for the Things Done Report, click **OK** to run the report.

Reading the Things Done Report:

The Things Done Report can be customized to display information including date and time of record modification, table name of the modified record, and detailed information on the modification. To customize the layout of the report, use the **Customize Layout** button on the Things Done Report toolbar.

- Establish a specific date range for the report by using the **From** and **Thru** buttons in the **Date Range** section. Select a pre-defined date range in the **Special Date Ranges** section.
- The Things Done Report is a user based report and can be run for only one user at a time. Select a user to run a Things Done Report for by selecting a user with the **User Name** drop-down.

Пт	Things Done Report for DEMO from 09/28/2007 Through 10/05/2007 (47)								
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	Date	Time	Operation	Client Name	Table Name	Description 🔶			
	10/04/2007	01:56 PM	Modified	Odell, Daniel	DBUser				
	10/04/2007	01:57 PM	Modified		UserProf				
	10/04/2007	01:57 PM	Modified		UserProf				
	10/04/2007	01:57 PM	Modified		WinPos				
	10/04/2007	01:57 PM	Modified			Logout			
	10/04/2007	01:57 PM	Added			Login			
	10/04/2007	01:58 PM	Modified		WinPos				
	10/04/2007	02:00 PM	Modified		WinPos				
	10/04/2007	02:00 PM	Added		ColDesc				
	10/04/2007	02:00 PM	Modified	Alexander, Sherman	Phone				
	10/04/2007	02:00 PM	Added	Alexander, Sherman	SmartPad	10/04/2007 - Previous Residence phone: (626)-335-4534#			
	10/04/2007	02:01 PM	Added			Login			
	10/04/2007	02:03 PM	Modified		WinPos				
	10/04/2007	02:03 PM	Modified		ColDesc				
	10/04/2007	02:03 PM	Modified		WinPos				
	10/04/2007	02:03 PM	Modified			Logout			
	10/04/2007	02:03 PM	Added			Login			
	10/04/2007	02:05 PM	Modified		WinPos				
	10/04/2007	02:05 PM	Modified		ColDesc				
	10/04/2007	02:22 PM	Modified		WinPos				
	10/04/2007	02:24 PM	Modified		WinPos	×			
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Figure 2: The Things Done Report.

To modify the type of information tracked on the Things Done Report:

- Open a user profile by clicking on the **Database** menu in the main screen of CDS and selecting **Modify Current User Profile**.
- With the User Profile open, select the **Things Done** tab.
- Make adjustments to the kind of information captured in the Things Done Report by selecting and/or deselecting options on the **Things Done** tab.
- Administrators can limit a users ability to view the Things Done Report and make adjustments on the **Things Done** tab.

To activate or deactivate a user's ability to view the Things Done Report and the Things Done tab:

- Open the User Profile for the desired user.
- Select the **Security Information** tab.
- Make the desired selection by selecting/deselecting the **Read Things Done** option in the **Data Security Options** section of the **Security Information** tab.

To delete old entries in the Things Done Report and reduce the size of your database:

- Run a Things Done Report for a specific date range when entries in the Things Done Report are no longer relevant.
- Verify that the records in the report are no longer needed.
- If none of the records are needed, click the **Tag All** button in the Things Done Report toolbar. If only selected records are needed, individually tag the unnecessary records.
- Click the **Delete** button on the Things Done Report toolbar.
- For a thorough cleaning of Things Done Report entries, run a Things Done
- Report for each user and delete all unneeded entries.
- After deleting unneeded entries in the Things Done Report, it is a good idea to perform a database rebuild.



For more information on performing a database rebuild, see Fast Class File Volume 101: Database Maintenance - <u>http://www.ez-</u> <u>data.com/news/eznews/CDS_Vol101DBRebuild/Vol101FCFile.pdf</u>