June 3, 2008

Fast·Class File

Client Data System

Volume 137: Time Log Based Fee Report

This Fast Class demonstrates one way of creating a dynamic report that will calculate fees for time spent working with a client based on an hourly rate. The hourly rate and time data is captured in the **Time Log Information** window when making a Time Log entry in a contact record SmartPad.

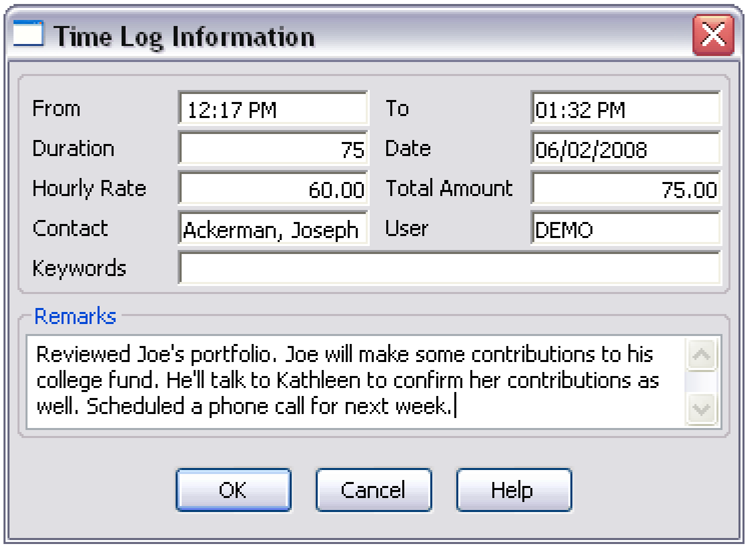

Figure 1: The Time Log Information window.

To create the Time Log Based Fee Report :

- From the main screen in CDS, select **Reports** in the **Main Menu**.
- Select **Dynamic Reports**.
- Leave the search fields blank in the **Find Report Selection** window and click **OK**.
- In the **Report Selection** summary screen, click the **Add** button.
- Select the **Contact Information** table in the **Select Primary Table** window of the **Report Definition Wizard** and click **Next**.
- Select the **First Name** and **Last Name** columns in the **Report Column Definition** window.
- Select the **Time Log Information** table in the **Table** drop-down field under the **Columns Available** section.
- Select the **Date**, **Remarks**, **Duration**, **Hourly Rate**, and **Total Amount** columns in the **Report Column Definition** window.
- Adjust the width of selected columns as needed.

Note: Due to the fact that the Time Log Based Fee Report is built on two tables, column width cannot be adjusted in report results.

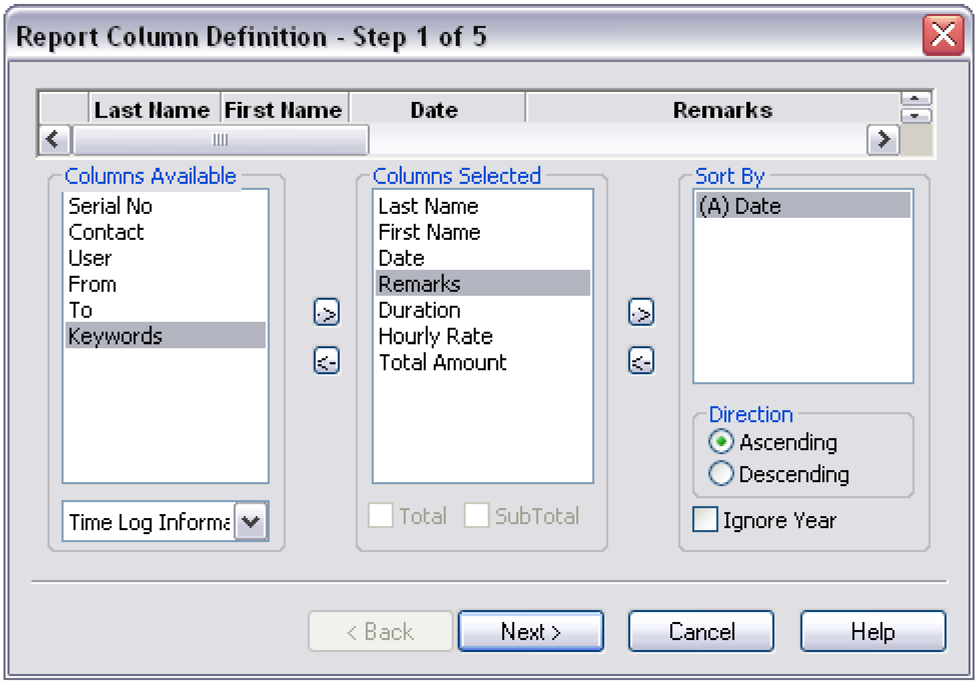

Figure 2: Report Column Definition window (criteria added).

- Select the **Duration** column in the **Columns Selected** section and select the **Total** option.
- Select the **Total Amount** column in the **Columns Selected** section and select the **Total** option.
- Select the Date column in the **Columns Selected** section and click the arrow button pointing to the **Sort By** section.
- Click **Next**.
- In the **Report Selection Criteria** window (step 2), click the small button to the right of the first **Filter** drop-down field.
- In the **Filter** summary screen, click the **Add** button.
- Select the **Time Log Information** table in the **Table Names** window and click **OK**.
- In the **Filter Time Log Information** window, select the following criteria –
  - Column Name = **Contact**
  - Operation = **Cur. Record**

*Note: When the **Current Record** operation is selected, the **Value** field disappears as the value is determined by the current selected record.*

- Click the **Add** button to add selected criteria to the filter.

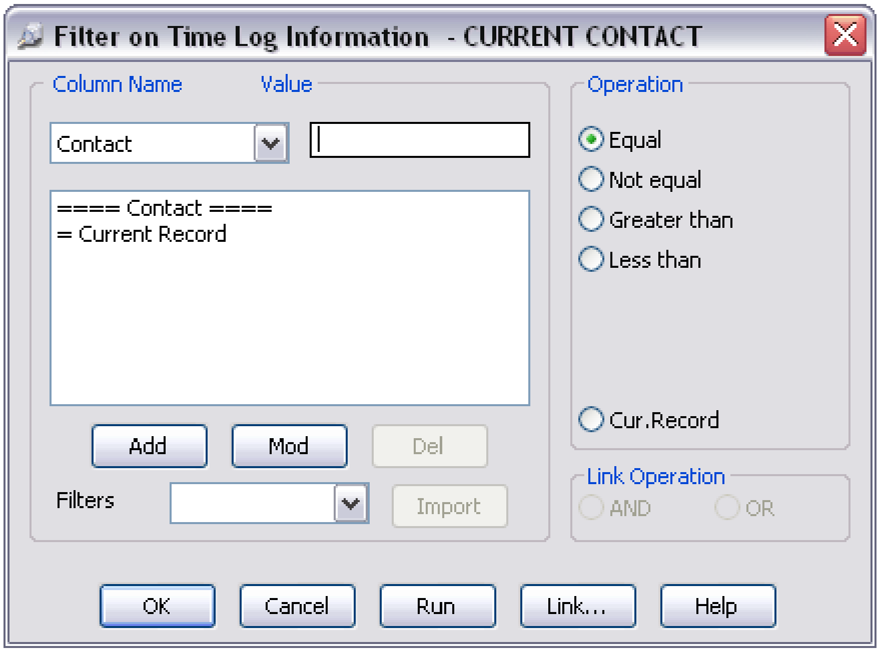

Figure 3: The Filter on Time Log Information window (criteria added).

- Click **OK**.
- Enter **Current Contact** as the name of the new filter.
- The new filter will appear in the **Filter Summary** screen.
- With the **Current Contact** filter selected, click the **OK** button (green checkmark) in the **Filter** summary toolbar.
- The **Current Contact** filter will be added to the **Report Selection Criteria** screen in the first **Filter** drop-down field.
- Click **Next**.
- Click **Next** to accept the default selections in step 3.
- Click **Next** to accept the default selections in step 4.
- Enter **Time Log Fee Report for Selected Contact** as the name of the dynamic report in step 5.
- Click **Finish** to create the **Time Log Fee Report for Selected Contact** dynamic report.

To run the Time Log Fee Report for Selected Contact dynamic report:

- Open a contact record.
- Select **Reports** in the main menu.
- Select **Dynamic Reports**.
- Tag the **Time Log Fee Report for Selected Contact** dynamic report and click the **Run** button.