Fast•Class File

Client Data System

Volume 26: Contact Activity Reports

Activity Reports

- Open the CDS Calendar (any view will do).
- Click on Reports in the main menu and then select Activity Reports.

Reports	Toolbar	Window	Help			
Dynar	Ctrl+Y					
Activity Reports						
Activit	y Summar		•			

• In the Activity Report Options window, select options for each available field.

Activity Report Options	Select a date for the report in the Date field. By default, the current date is selected. Select a different date by clicking on the Date button.
Date 01/14/2004 User Name DEM0 T	Select the user for whom the report will be created in the User Name drop-down. Available user will be determined by Proxy settings in User Preferences.
Report Type Monthly Show Image: Time Image: Activity Image: Time Image: Activity Image: Time Image: Activity	Select Monthly, Weekly, or Daily report formats in the Report Type drop-down. Selecting the Monthl report type allows you to preview Daily and Weekly report types as well.
IV Name IV Reason IV Active Only	Select detail information to be included for each activity in the Show section.
OK Cancel	Click OK when finished selecting options.

- The selected report will open in a new window.
- If desired, select a different report type in the **Report Type** drop-down.

MonthView 4 Weeks				
DayView Portrait 📃 🔺				
DayView LandScape 👘				
DayView LandScape(7 to 10)				
DayView Portrait with Time				
Trifold				
DayView II				
WeekView Portrait				
WeekView Landscape				
Week Long				
WeekView Landscape 6Days 👘 👘				
WeekView Portrait 6Days				
MonthView 4 Weeks				

• Click the **Print** button to print the selected report.

Activity Summary Reports

- Open the CDS Calendar (any view will do).
- Click on **Reports** in the main menu and then select **Activity Summary**.
- In the Activity Summary menu, select the desired Activity Summary report.

Reports Toolbar Window	Help		
Dynamic Reports Ctrl+1 Activity Reports		+ 🍡 🗊 📮 🧐 🗹 🐺 🏹 🖌	
Activity Summary	•	Activities for current day	
.)-Rowland Heights (R	+ <mark>-</mark> 🗍 '	Activities for next 7 days	
	Nan Aschtouni	<u>C</u> alls for current day Calls for <u>n</u> ext 7 days	
	Ackerman	Appointments for current day App <u>o</u> intments for next 7 days	
		User Defined Filter	

The **Activities for current day** report and the **Activities for next 7 days** report will give a detailed listing of all un-timed activities, followed by a detailed listing of all timed activities.

The **Calls for current day** report and the **Calls for next 7 days** report will give a detailed listing of all activities designated as a **Call** in the **Type** field of the **Activity Detail** window.

The **Appointments for current day** report and the **Appointments for next 7 days** report will give a detailed listing of all activities designated as an **Appointment** in the **Type** field of the **Activity Detail** window.



- The selected report will open in a new window.
- Click the **Print** button on the toolbar to print the selected report or export the report in a variety of formats by clicking the **Export** button.



