Activity Reports

- Open the CDS Calendar (any view will do).
- Click on **Reports** in the main menu and then select **Activity Reports**.
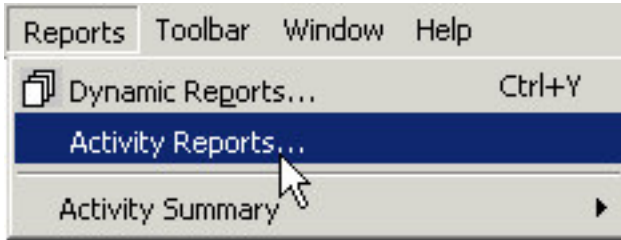
- In the **Activity Report Options** window, select options for each available field.

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.

Select the user for whom the report will be created in the **User Name** drop-down. Available users will be determined by **Proxy** settings in **User Preferences**.

Select **Monthly**, **Weekly**, or **Daily** report formats in the **Report Type** drop-down. Selecting the **Monthly** report type allows you to preview **Daily** and **Weekly** report types as well.

Select detail information to be included for each activity in the **Show** section.

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.

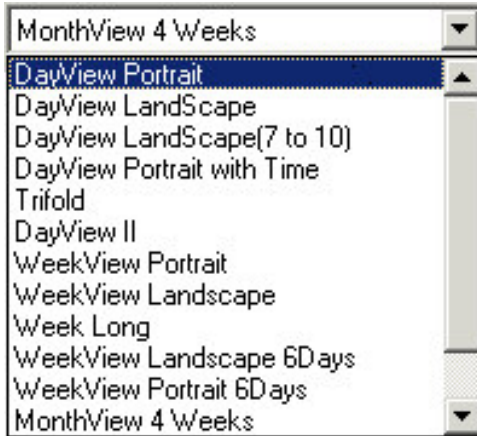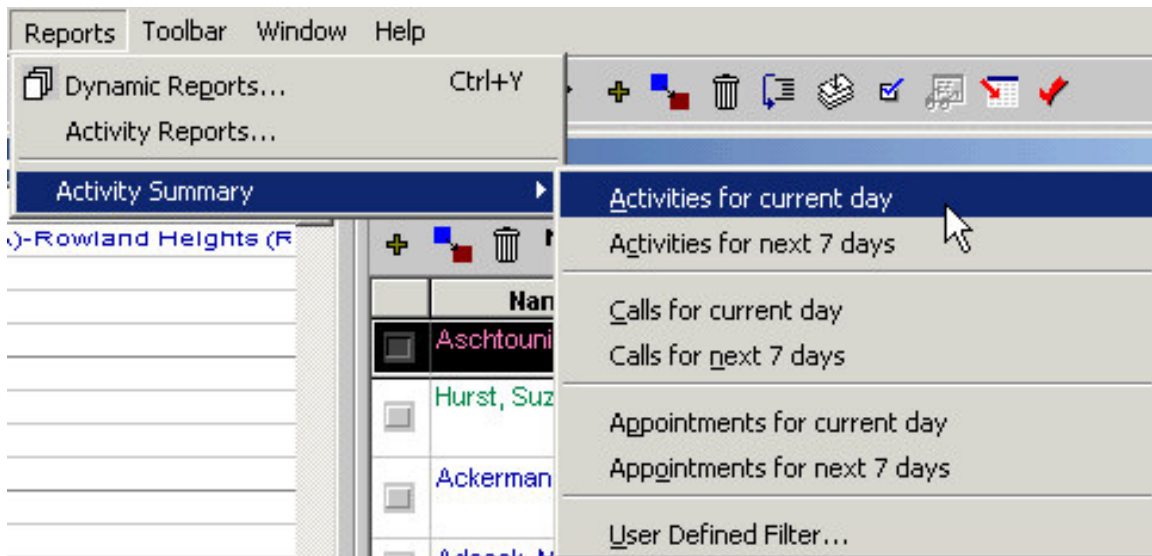- Click the **Print** button to print the selected report.

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.

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.