

Suggestions for running the Firm Monthly Productivity Recap report:

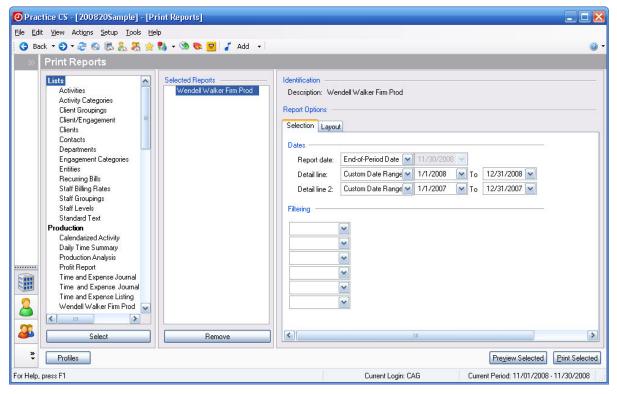
- Detail Line: 1/1/XX 12/31/XX Screen Shot: 1
- Filter for Only Time Entries (option 1) or split the Time Entries and Expense Entries (option 2)
  - Option 1 Filtering Activity|Filter|Time Entries Screen Shot: 2a & b
  - Option 2 Group by: Activity Type Screen Shot: 3

Screen Shot 4 shows Option 1

Screen Shot 5 shows Option 2

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Screen Shot: 1



Practice CS - [200820Sample] - [Print Reports]	
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Lists       Activities         Activity Categories       Image: Client Groupings         Client Groupings       Client/Engagement         Clients       Departments         Engagement Categories       Entities         Recurring Bills       Staff Groupings         Staff Groupings       Staff Coupings         Staff Levels       Standard Text         Production       Calendarized Activity         Daily Time Summary       Production Analysis         Profit Report       Time and Expense Journal         Time and Expense Journal       Time and Expense Journal         Select       Remove	Identification         Description:         Report Options         Selection         Dates         Report date:         End-of-Period Date         Detail line:         Custom Date Range         1/1/2008         Detail line:         Custom Date Range         1/1/2007         To         12/31/2008
	Preview Selected Print Selected
For Help, press F1	Current Login: CAG Current Period: 11/01/2008 - 11/30/2008

## Screen Shot 2b

O Activity Filters		×
Activity Filters Search: Time Entries	Criteria Identification Filter Name: Time Entries Criteria Information Filter by: Method: Selected: Type Single Time Single Time Logic Output Logic Output Must match all criteria Must match one or more criteria	_
Add Edit Delete	Enter Cancel Done	

## Screen Shot 3

🙆 Prac	tice CS - [200820Sample] - [Pr	int Reports]					🛛
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>>	Print Reports						
	Lists  Activities Activity Categories Client Groupings Client/Engagement Clients	Selected Reports Wendell Walker Firm Prod	Report Options	Vendell Walker Firm Prod			
	Contacts Departments				Sort on:	Direction:	Page Break
	Engagement Categories		Group by:	Activity Type 🍡	Description 🛛 👻	Ascending	
	Entities Recurring Bills			<none></none>		Ascending	
	Staff Billing Rates			<none></none>		Ascending	
	Staff Groupings Staff Levels		Detail by:	Client	ID 💌	Ascending	
	Standard Text						
	Production Calendarized Activity Daily Time Summary Production Analysis Profit Report Time and Expense Journal Time and Expense Journal Time and Expense Journal Time and Expense Journal Wendell Walker Firm Prod Work-in-Process Summary Billing Select	Remove	Print Cove	r Sheet	ш		
» •	Profiles				Previ	ew Selected	int Selected
For Help, p	press F1			Current Login: CAG	Current Period	: 11/01/2008 - 11/	/30/2008

## Screen Shot 4

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			F	irm Mo	nthly Pr				etail by	/: Clie	nt		
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							)8 - Dece						
Type of In	formation:	: Hours /S	standard Ar	nounts	Janua	ary 1, 200	)7 - Dece	mber 31,	2007				
	Jan 08	Feb 08	Mar 08	Apr 08	May 08	Jun 08	Jul 08	Aug 08	Sep 08	Oct 08	Nov 08	Dec 08	
	Jan 07	Feb 07	Mar 07	Apr 07	May 07	Jun 07	Jul 07	Aug 07	Sep 07	Oct 07	Nov 07	Dec 07	Total
112	46	Lighty	ear Handy	rman Sers	rices								
	12.60	2.50	0.00	0.00	15.00	0.00	0.00	0.00	0.00	0.00	128.00	5.00	163.10
1,	176.50	225.00	0.00	0.00	1,350.00	0.00	0.00	0.00	0.00	0.00	11,420.00	350.00	14,521.50
· · · · · ·	4.50	2.50	6.90	2.00	5.00	5.25	2.00	3.40	3.75	5.70	1.75	3.40	46.15
	405.00	225.00	717.00	180.00	450.00	472.50	180.00	306.00	337.50	513.00	157.50	306.00	4,249.50
Re	port Tota	aks											
	12.60	2.50	0.00	0.00	15.00	0.00	0.00	0.00	0.00	0.00	128.00	5.00	163.10
	12.00	225.00	0.00	0.00	1,350.00	0.00	0.00	0.00	0.00	0.00	11,420.00	350.00	14,521.50
	176.50	225.00					2.00	3.40	3.75	5.70	1.75	3.40	46.15
		225.00	6.90	2.00	5.00	5.25	2.00						

## Screen Shot 5

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				1.5	Nove	mber 30	, 2008	-				
Annual Annual				Janu	ary 1, 20	08 - Dece	mber 31	2008				
Type of Informa	tion: Hours /:	Standard Ar	nounts	Janu	ary 1, 20	07 - Dece	mber 31	, 2007				
Jan 08	Feb 08	Mar 08	Apr 08	May 08	Jun 08	Jul 08	Aug 08	Sep 08	Oct 08	Nov 08	Dec 08	
Jan 07	Feb 07	Mar 07	Apr 07	May 07	Jun 07	Jul 07	Aug 07	Sep 07	Oct 07	Nov 07	Dec 07	Total
Expense	Expense											
11246	Lighty	ear Handy	rman Serv	rices								
0.00	0.00	0.00	0.00	10.00	0.00	0.00	0.00	0.00	0.00	50.00	0.00	60.0
0.00		0.00	0.00	50.00	0.00	0.00	0.00	0.00	0.00	200.00	0.00	250.00
0.00		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
Expense	Expense To											
0.00		0.00	0.00	10.00	0.00	0.00	0.00	0.00	0.00	50.00	0.00	60.00
0.00		0.00	0.00	50.00	0.00	0.00	0.00	0.00	0.00	200.00	0.00	250.00
0.00		0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00 0.00	0.00	0.00 0.00	0.00 0.00	0.0 0.0
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Time	Time											
11246		ear Handy										
12.60 1,176.50		0.00 0.00	0.00 0.00	15.00 1,350.00	0.00 0.00	0.00 0.00	0.00	0.00 0.00	0.00	128.00 11,420.00	5.00 350.00	163.1 14,521.9
4.50		6.90	2.00	5.00	5.25	2.00	3.40	3.75	5.70	1,420.00	3.40	46.1
405.00		717.00	180.00	450.00	472.50	180.00	306.00	337.50	513.00	157.50	306.00	4,249.5
Time	Time Total	5										
12.60	2.50	0.00	0.00	15.00	0.00	0.00	0.00	0.00	0.00	128.00	5.00	163.10
1,176.50	225.00	0.00	0.00	1,350.00	0.00	0.00	0.00	0.00	0.00	11,420.00	350.00	14,521.50
4.50		6.90	2.00	5.00	5.25	2.00	3,40	3.75	5.70	1.75	3.40	46.15
405.00	225.00	717.00	180.00	450.00	472.50	180.00	306.00	337.50	513.00	157.50	306.00	4,249.50
Report 1	otals											
12.60		0.00	0.00	25.00	0.00	0.00	0.00	0.00	0.00	178.00	5.00	223.10
1,176.50	225.00	0.00	0.00	1,400.00	0.00	0.00	0.00	0.00	0.00	11,620.00	350.00	14,771.50
4.50	2.50	6.90	2.00	5.00	5.25	2.00	3.40	3.75	5.70	1.75	3.40	46.1
405.00	225.00	717.00	180.00	450.00	472.50	180.00	306.00	337.50	513.00	157.50	306.00	4,249.5