Task Tracking (Ready, Received, Login Filter)

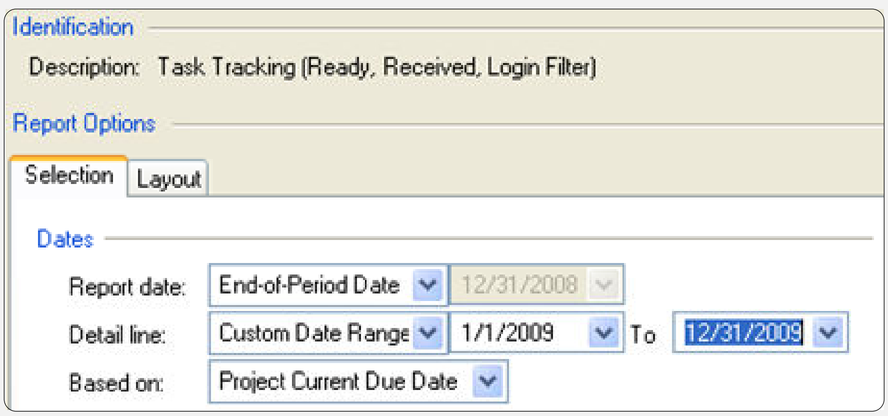
Description: This report is similar to the Task Tracking report except that it only shows tasks that meet the following criteria:

1. The Task is marked as "Ready"
2. The Project has a received date
3. The currently logged in Staff matches the Staff assigned to the Task
4. The Project does not have a tracking description of "Cancelled" or "Completed"

It also contains the following additional information:

- Business, mobile, and home phone of the client (if available).
- Task comment

Driving Workflow: This report provides a good way to manage workflow because it will only show the Tasks that are truly ready to be worked on. One way to incorporate this into the daily operation of your Firm would be to make it into a Custom Portlet. Then each staff member could add the portlet to their dashboard to keep tabs of everything that is ready to be worked on. For more information about setting up a Custom Portlet please see page 2. Keep in mind that for the portlet to work effectively the staff must choose the proper date range for the report. One method for managing this would be to set the date range for a whole year at a time. For example:



Setting up a Report Viewer portlet

You can create portlets that display a preview of a Practice CS report of your choice on any dashboard. The report preview is displayed within the portlet after you add it to a dashboard.

To set up custom portlets, choose Setup / Custom Portlets.

1. On the Custom Portlets setup screen, click the Add button to add a new portlet.

2. In the **Description** field, enter a name for the portlet. This name will appear in the Select Portlets dialog and in the portlet's title bar.

3. In the **Type** field, select Report Viewer.

4. To create a portlet that can be viewed by all firm employees, verify that the **Allow others to view this portlet** checkbox is marked. If unmarked, only the staff member who creates the portlet will be able to view it.

5. Under Configuration, select the name of the report you want to preview in the portlet.

6. Click Enter to save the portlet.

When you add the report viewer portlet to a dashboard, the report Options screen will open and allow you to specify Selection and Layout options for the report. You can change these at any time by right-clicking the portlet and choosing Options from the context menu.

For more information about Custom Portlets see the Practice CS Help.