PracticeMaster Report Writer Guide

Tabs3 Billing   PracticeMaster   Trust Accounting   Accounts Payable   General Ledger

PracticeMaster Report Writer Guide

Table of Contents

Purpose of Guide

One of PracticeMaster's most powerful features is the ability to create customized reports based on any information stored in PracticeMaster. The PracticeMaster Report Writer Guide covers creating both basic and complex reports, a breakdown of each piece of the Report Writer, and scenarios to get you started.

Additional guides for other software features are also available. All guides are available on our website at:

Tabs3.com/support/docs.html

Knowledge Base

You may be referred to additional detailed information located in our Knowledge Base at:

support.Tabs3.com

Additional Resources

A comprehensive list of all resources for Tabs3 Software can be found on page 59.

Report Creation Made Easy

The PracticeMaster Report Writer can create basic and complex reports. Let's look at a few basic scenarios to get an idea of how you can easily create and edit reports.

Creating a Report

Let's say you want to create a basic report that shows the Client ID, Client Name, Date Open, and Area of Practice. This can easily be completed using the Report Wizard.

▶ **To create a report using the Report Wizard**

1. In the Quick Launch, search for and select "Report Writer."

2. Click the toolbar button.

3. Enter the desired **Report Name** that is 8 characters or less, such as BasicCL.

4. Click **OK**. The **Main** panel of the Report Wizard will be opened.

   a. Enter a **Title** for the report, such as Basic Client List.

   b. Click **Next**.

   c. From the **Fields** panel of the Report Wizard, double-click each field you want included on the report. Using our example, you would double-click **Client_ ID**, **Name**, **Date_Open**, and **AOP**.

   d. Click **Next**.

   e. Click **Finish** to save.

5. Preview the report as discussed in the following section.

Date: 08/26/2024   **Basic Client List**   Page: 1
Jensen, Martin & Anderson, P.C.

Client ID	Name	Date Open	AOP
1.00	Administrative Account	08/19/2024	
100.00	Larson/Michael	06/17/2024	WC
101.00	Williams/John	05/22/2024	CRIMLAW
102.00	Gilbert/Andrew C.	04/22/2024	PI
120.01	Klein/Daniel P.	07/23/2024	WC
121.01	Phillips/Marcus	03/19/2024	REALEST
200.01	Peterson Insurance Co.	04/20/2024	BUSLAW
200.02	Peterson Insurance Co.	05/17/2024	ADMIN
415.00	MegaConstruction Corporation	07/19/2024	BUSLAW
850.00	White/Kelly	07/16/2024	FAMILY
850.01	White/Kelly	08/06/2024	WILLS
850.02	White/Kelly	07/15/2024	

Figure 1, Creating a Report

Previewing a Report

Creating a report is a process that can take several rounds of editing. Once the base report is created, preview the report in order to determine what changes need to be made. Do fields need to be added? Do the columns need to be rearranged? Do you need to add a filter so as to limit the results? Previewing the report is an important step in the report creation process.

When working with the Report Wizard, you can preview the report from the Report Writer window by doing one of the following:

- Double-click the report
- Select the report and click the **Print** button
- Right-click the report and select **Print**

When working with the Report Writer Editor, you can preview the report from the Report Writer Editor window by clicking the 🖶 button.

Adding Fields to a Report

Let's say you now want to add the client's city and state to the report.

▶ **To add fields to a Wizard report**

1. In the Quick Launch, search for and select "Report Writer."

2. Select the report you want to modify.

3. Click the **Modify** button.

4. The Report Writer Wizard will be opened.

    a. Click **Next**.

    b. Double-click each field you want to be added to the report. Using our example, you would double-click **City** and **State**.

    c. Click **Next**.

    d. Click **Finish** to save.

5. Preview the report to review changes.

Date: 08/26/2024		**Basic Client List** Jensen, Martin & Anderson, P.C.				Page: 1
City	**State**	**Client ID**	**Name**		**Date Open**	**AOP**
		1.00	Administrative Account		08/19/2024	
Lincoln	NE	100.00	Larson/Michael		06/17/2024	WC
Chicago	IL	101.00	Williams/John		05/21/2024	CRIMLAW
Roswell	NM	102.00	Gilbert/Andrew C.		04/20/2024	PI
Sacramento	CA	120.01	Klein/Daniel P.		07/25/2024	WC
San Bernardino	CA	121.01	Phillips/Marcus		03/19/2024	REALEST
Malcolm	NE	200.01	Peterson Insurance Co.		04/20/2024	BUSLAW
Malcolm	NE	200.02	Peterson Insurance Co.		05/17/2024	ADMIN
Manhattan	NY	415.00	MegaConstruction Corporation		07/19/2024	BUSLAW
Los Angeles	CA	850.00	White/Kelly		07/16/2024	FAMILY
Los Angeles	CA	850.01	White/Kelly		08/06/2024	WILLS
Los Angeles	CA	850.02	White/Kelly		07/15/2024	

Figure 2, Adding Fields to a Report

Changing the Column Order

Let's say you want to change the order in which columns appear on the basic report we created.

▶ **To change column order in a Wizard report**

1. In the Quick Launch, search for and select "Report Writer."

2. Select the report you want to modify.

3. Click the **Modify** button.

4. The Report Writer Wizard will be opened.

    a. Click **Next**.

    b. In the **Report Fields** list on the right side of the window, select a field to be moved and use the **Move Up** and **Move Down** buttons to place the fields in the desired order. The order shown in the list reflects the order of the columns on the report.

    c. Click **Next**.

    d. Click **Finish** to save the report definition.

5. Preview the report to review changes.

Client ID	Name	City	State	Date Open	AOP
	Date: 08/26/2024	**Basic Client List** Jensen, Martin & Anderson, P.C.			Page: 1
1.00	Administrative Account			08/19/2024	
100.00	Larson/Michael	Lincoln	NE	06/17/2024	WC
101.00	Williams/John	Chicago	IL	05/21/2024	CRIMLAW
102.00	Gilbert/Andrew C.	Roswell	NM	04/20/2024	PI
120.01	Klein/Daniel P.	Sacramento	CA	07/23/2024	WC
121.01	Phillips/Marcus	San Bernardino	CA	03/19/2024	REALEST
200.01	Peterson Insurance Co.	Malcolm	NE	04/20/2024	BUSLAW
200.02	Peterson Insurance Co.	Malcolm	NE	05/17/2024	ADMIN
415.00	MegaConstruction Corporation	Manhattan	NY	07/19/2024	BUSLAW
850.00	White/Kelly	Los Angeles	CA	07/16/2024	FAMILY
850.01	White/Kelly	Los Angeles	CA	08/06/2024	WILLS
850.02	White/Kelly	Los Angeles	CA	07/15/2024	

Figure 3, Changing the Column Order

Adding a Filter to a Report

Let's say we now only want to see clients who are part of the Workers' Compensation and Personal Injury areas of practice in the basic report we created. You will launch the Report Writer Editor from the wizard to add a filter.

▶ **To use a filter in a Wizard report**

1. In the Quick Launch, search for and select "Report Writer."

2. Select the report you want to modify.

3. Click the **Modify** button.

4. The Report Writer Wizard will be opened.

    a. Click **Next** twice to display the **Finish** panel.

    b. From the Finish window, in the **Report Writer Editor** section, click the **Editor** button.

      i.   From the **Filter** tab, click the **New Row** button.

      ii.   In the list of fields, select **AOP** and click the **Insert** button.

      iii.   Make sure that the selected **Test Condition** is **equal to**.

      iv.   Click in the **Test Value** field and enter "WC".

      v.   Click the **New Row** button.

      vi.   In the list of fields, select **AOP** and click the **Insert** button.

      vii.   In the **And/Or** column, select **Or**.

      viii.   Make sure that the selected **Test Condition** is **equal to**.

      ix.   Click in the **Test Value** field and enter "PI".

  c. Click 💾 to save.

5. Preview the report to review changes.

Date: 08/26/2024	Basic Client List Jensen, Martin & Anderson, P.C.				Page: 1
Client ID Name		**City**	**State**	**Date Open**	**AOP**
100.00 Larson/Michael		Lincoln	NE	06/17/2024	WC
102.00 Gilbert/Andrew C.		Roswell	NM	04/20/2024	PI
120.01 Klein/Daniel P.		Sacramento	CA	07/23/2024	WC

Figure 4, Adding a Filter to a Report

Changing the Default Sort

Let's say you now want to sort all records by their open date, starting with the newest client, in the basic report we created.

▶ To change the default sort on a report

1. In the Quick Launch, search for and select "Report Writer."

2. Select the report you want to modify.

3. Click the **Modify** button.

4. The Report Writer Editor will be opened.

  a. On the **Image Layout** tab, click the 🔼SORT toolbar button.

  b. On the **System** tab, in the list of fields, select **GLOBAL** and click the **Insert** button.

    c. In the **Header Position** field, select **Before**.

    d. Click **OK**.

    e. On the **Image Layout** tab, click the 🔲 toolbar button.

    f. On the **File** tab, in the list of fields, select **Date_Open** and click the **Insert** button.

    g. In the **Sort Order** field, select **Descending**.

    h. Click **OK**.

    i. Click 💾 to save the report definition.

5. Preview the report to review changes.

Date: 08/26/2024		**Basic Client List** Jensen, Martin & Anderson, P.C.				Page: 1
Client ID	**Name**		**City**	**State**	**Date Open**	**AOP**
120.01	Klein/Daniel P.		Sacramento	CA	07/23/2024	WC
100.00	Larson/Michael		Lincoln	NE	06/17/2024	WC
102.00	Gilbert/Andrew C.		Roswell	NM	04/20/2024	PI

Figure 5, Changing the Default Sort

In Summary

Using just a few scenarios, we have created a new report, added fields to it, changed the column order, added a filter, and changed the default sort. Our new report provides the Client ID, Name, Date Opened, City, State, and AOP of those clients who are part of the Workers' Compensation and Personal Injury areas of practice in order of newest client first. This demonstrates how you can easily create a basic yet powerful report using PracticeMaster Report Writer.

Report Writer Window

Menu:	*Reports	Report Writer*
Home:	*All Actions	Reports	Report Writer*
Quick Launch:	*Report Writer*

Let's take a closer look at the Report Writer window. The Report Writer window is comprised of a table of contents, buttons, toolbar, and the right-click menu.
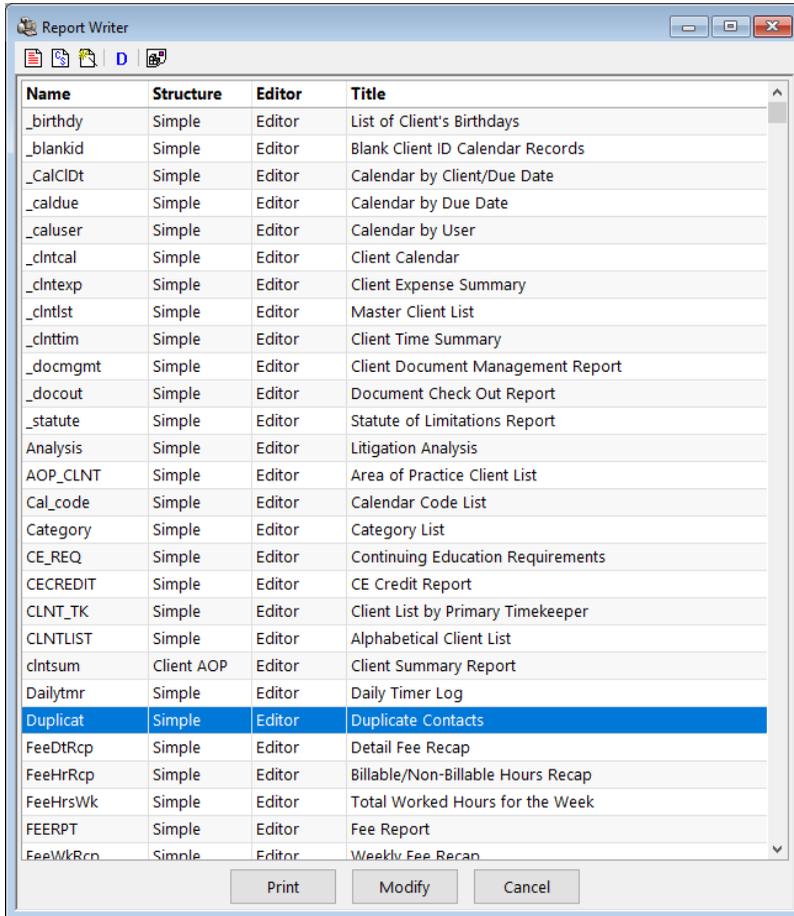

Figure 6, Report Writer window

Report Writer Table of Contents

Reports are shown in a Table of Contents list which is in alphabetical order by Report Name. You can change the sort order of records by clicking a column heading.

You can use the PgUp, PgDn, Up-Arrow, Down-Arrow, Home, and End keystrokes as well as the scroll bar to scroll through the Table of Contents. The information to create each report is stored in a file that is referred to as a report definition. Report definitions are created using the Report Wizard or the Report Writer Editor. Report definition files end in *.RW. All PracticeMaster report definitions are stored in the \CMREPORT folder under the current working directory. Listings of report definitions can be printed.

> **Technical Note:** The Table of Contents information is stored in a file named CMRW.TOC and is located in the \CMREPORT folder.

Report Writer Editors

PracticeMaster offers two editors for creating report definitions: the Report Wizard and the Report Writer Editor. Both types of reports are accessed from the Report Writer window.

Report Wizard	The Report Wizard can be used to quickly create basic reports.
Report Writer Editor	The Report Writer Editor can be used for creating more complex reports and can be used to access all details of any report definition. The Report Writer Editor is also used to modify Client Summary Reports.

> **Note:** The Table of Contents in the Report Writer window includes an Editor column. This column indicates whether a report definition was last accessed with the Report Writer Editor or the Report Wizard. Reports last accessed using the Report Writer Editor will show "Editor" in this column. Reports last accessed by the Report Wizard will show "Wizard" in this column.

Report Structure

Reports are classified as Simple Reports or Client AOP Reports.

Simple Report	A **Simple Report**, also called a Normal Report, uses a single file or uses a file that links to a single record file. The Timekeeper List is a classic example of a Simple Report. These reports are shown in the Report Writer window by right-clicking the Report Writer window, pointing to **Filter** and selecting **View Normal Reports**.
Client AOP Report	A **Client AOP Report** uses multiple files and essentially consists of multiple Simple Reports "strung together" per client. The Client Summary Report is a classic example of a Client AOP Report. These reports are shown in the Report Writer window by right-clicking the Report Writer window, pointing to **Filter** and selecting **View Client AOP Reports**.

PracticeMaster provides you with a group of core reports which are referred to as **system reports**.

System Reports	System reports are provided with the software. The report definitions for the system reports begin with an underscore character. If desired, these reports can be modified via the Report Writer Editor. The Master Client List is a classic example of a System Report. These reports are shown in the Report Writer window by right-clicking the Report Writer window, pointing to **Filter** and selecting **View System Reports**.

Report Name Window

The **Report Name** window is shown when creating, renaming, or copying a PracticeMaster report definition via the Report Wizard or the Report Writer Editor.
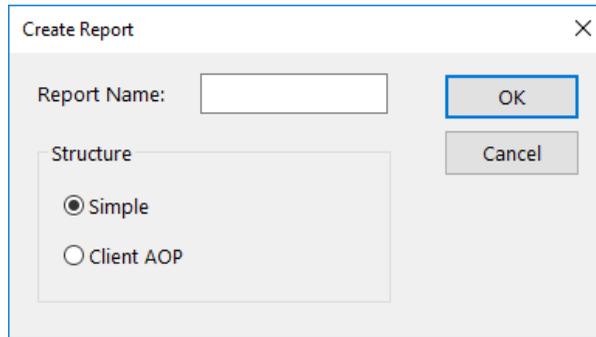
Figure 7, Report Name window

Report Name	Maximum of 8 characters. The **Report Name** can consist of letters, numbers, and the underscore character. The first character of the **Report Name** must be a letter or a number because the underscore character is reserved for system reports. The **Report Name** is shown under the **Name** column of the Table of Contents.
Structure	The structure determines whether the report will be a Simple Report or a Client AOP Report. This option is only available when adding a new report. When creating a Client Summary Report, the structure is automatically configured as a Client AOP Report. When creating a report using the Report Wizard, the structure is automatically configured as a Simple Report.

The **OK** button can be used to create the report definition and close the window. When creating a new report, either the Report Wizard or Report Writer Editor will be displayed.

The **Cancel** button can be used to close the window without creating a new report definition.

Report Writer Buttons

Report writer activities are accessed by selecting the desired report and then using the buttons at the bottom of the window, the toolbar buttons, or the right-click menu options.

Print	The **Print** button can be used to print the selected report. Double-clicking a report can also be used to print the report.
Modify	The **Modify** button can be used to edit the selected report. After clicking the **Modify** button, either the Report Wizard or Report Writer Editor will be opened depending on which editor is listed in the Table of Contents.
Cancel	The **Cancel** button can be used to close the Report Writer window.

Report Writer Toolbar

The following toolbar buttons are available in the Report Writer window:

Create Report	Use this button to create a new report. The Report Name window *(Figure 7)* will be displayed followed by the Report Writer Editor *(page 24)*.
Create Client Summary Report	Use this button to create a new Client Summary Report *(page 54)*. The Report Name window will be displayed followed by the Report Writer Editor.
Report Wizard	Use this button to create a report using the Report Wizard *(page 18)*. The Report Name window will be displayed followed by the Report Wizard.
Print Report Definition	Use this button to print a report definition for the selected report.
Rebuild Table of Contents	Use this button to rebuild the Table of Contents file *(page 56)*.

Report Writer Right-Click Menu Options

The following menu options are available when right-clicking in the Report Writer window.

Print	The **Print** menu option can be used to print the selected report. Double-clicking a report can also be used to print the report.
Print Definition	The **Print Definition** menu option can be used to print a report definition for the selected report.
Print Client Summary Report	The **Print Client Summary Report** menu option can be used to print a Client Summary Report "on the fly" for a specified range of clients.
Modify	The **Modify** menu option can be used to edit the selected report. After selecting the **Modify** menu option, either the Report Wizard or Report Writer Editor will be opened depending on which editor is listed in the Table of Contents.
Create Report	The **Create Report** menu option can be used to create a new report. The Report Name window will be displayed followed by the Report Writer Editor.
Create Client Summary Report	The **Create Client Summary Report** menu option can be used to create a new Client Summary report. The Report Name window will be displayed followed by the Report Writer Editor.
Report Wizard	The **Report Wizard** menu option can be used to create a report using the Report Wizard. The Report Name window will be displayed followed by the Report Wizard.
Rename	The **Rename** menu option opens the Report Name window, allowing you to give the selected report definition a different name.
Copy	The **Copy** menu option opens the Report Name window, allowing you to copy the selected report definition to a new name.
Delete	The **Delete** menu option allows you to delete the selected report definition. You will be asked to confirm that you want to delete the report definition.

Filter	The **Filter** menu option lets you filter which reports are shown in the Table of Contents.
Rebuild	The **Rebuild** menu option can be used to rebuild the Table of Contents file.

Report Wizard

PracticeMaster's Report Writer includes a Report Wizard that can be used to create basic reports. The Report Wizard guides you through the report creation process step by step. Reports that are created using the Report Wizard will be displayed with "Wizard" under the Editor column of the Table of Contents in the Report Writer window.

The Report Wizard can be accessed by:

- Clicking the ⬚ button in the Report Writer window to add a new report.
- Selecting a "Wizard" report in the Report Writer window and clicking the **Modify** button.
- Right-clicking a "Wizard" report in the Report Writer window and selecting the **Modify** menu option.

The Report Wizard is extremely easy to use. It consists of three panels: the **Main** panel, the **Fields** panel, and the **Finish** panel.

The **Back** and **Next** buttons can be used to move from panel to panel.

The **Finish** button saves the report definition and closes the Report Wizard.

Main Panel

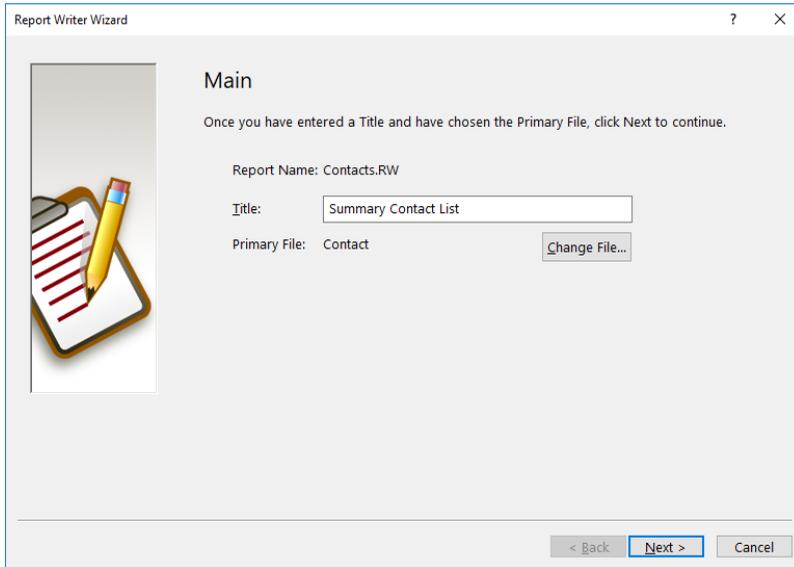The **Main** panel is the first panel of the Report Wizard.

*Figure 8, Report Writer Wizard - **Main** panel*

From this panel, you can specify the following information:

Title
Maximum of 35 characters. The **Title** is used in the Table of Contents and is also used as the default report heading.

Primary File
By default, the **Primary File** is the Client File. The primary file contains the "core" of the information required for the report. If you want your report to use a different file, click the **Change File** button. All records in the primary file can be selected. For example, if you want fees and client information for every client who has fees, select the Fee file instead of the Client file.

The **Change File** button will open a Select File window that can be used to select a different primary file.

The **Next** button will advance to the next panel.

The **Cancel** button will discard any changes made and close the Report Wizard. If you are adding a new report, the **Cancel** button will abort the entire report definition. If you are editing an existing report, the **Cancel** button will cancel all changes, close the Report Wizard and revert to the previous report definition.

Fields Panel

The **Fields** panel is the second panel of the Report Wizard. From this panel, you can select which fields you want included on the report.
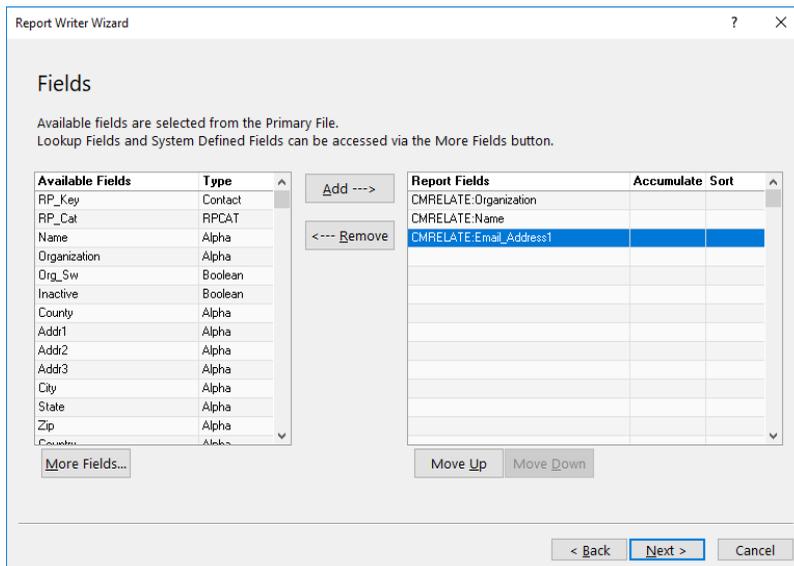
*Figure 9, Report Writer Wizard - **Fields** panel*

Two lists of fields are shown in this panel. On the left, the **Available Fields** column includes a list of all fields in the primary file. On the right, the **Report Fields** column includes a list of all fields that have been selected for the report.

Adding a Field

To add a field to the report, select the field and click **Add-->**. Or you can double-click a field in the **Available Fields** list to add it to the **Report Fields** list.

Removing a Field

To remove a field from the report, select the field in the **Report Fields** list and click **<--Remove**. Or you can double-click a field in the **Report Fields** list to remove it from the list.

The **Move Up** and **Move Down** buttons can be used to reposition a selected field in the **Report Fields** list. The order of the fields in the **Report Fields** list indicates the order of the columns on the report.

The **More Fields** button opens the Select Fields window, allowing you to select a lookup field or a system defined field.

The Report Fields list includes the following information:

Accumulate

The **Accumulate** column is available for numeric field types. Clicking in this column for a numeric field will display the various options available.

Blank

Leave this field blank if you do not want a total accumulated for the specified item.

Total

Select **Total** if you want a total accumulated for a specified item.

Average

Select **Average** if you want an average calculated for a specified item.

Sort

The **Sort** column determines which field will be used for sorting. Clicking in this column for a field will display the various options available. A Primary Sort and Secondary Sort can be selected. Only one Primary and one Secondary Sort can be selected using the Report Wizard. If you have selected a field for the Primary Sort and want to change it, you must first change the field with a Primary Sort to blank.

Blank

Leave this field blank if you do not want the field to be used for sorting.

Primary

Select **Primary** if you want the report to use the field for the Primary Sort.

Secondary

Select **Secondary** if you want the report to use the field for the Secondary Sort.

> **Note:** Additional sorts can be defined using the Report Writer Editor.

The **Back** button will move back to the previous panel.

The **Next** button will advance to the next panel.

The **Cancel** button will discard any changes made and close the Report Wizard. If you are adding a new report, the **Cancel** button will abort the entire report definition. If you are editing an existing report, the **Cancel** button will cancel all changes, close the Report Wizard, and revert to the previous report definition.

Finish Panel

The **Finish** panel is the third and last panel of the Report Wizard. From this panel, you can save the report definition and exit the Report Wizard, cancel changes, move back to the previous panel, or access the Report Writer Editor.
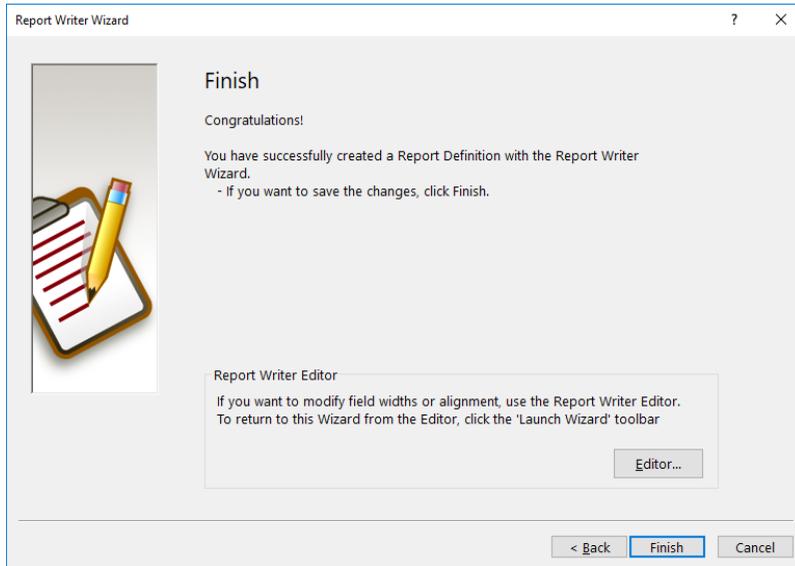

*Figure 10, Report Writer Wizard - **Finish** panel*

Editor

The **Editor** button will open the Report Writer Editor. The Editor in the Table of Contents will be changed from "Wizard" to "Editor". While in the Editor, you can modify field widths, alignment, spacing, and more. After saving your changes in the Editor, if you want the report to be changed back to a "Wizard" report, simply click the ⬜ button to launch the Report Wizard, click **Next** Twice and click **Finish**.

The **Back** button will move back to the previous panel.

The **Finish** button will save the report definition and close the Report Wizard.

The **Cancel** button will discard any changes made and close the Report Wizard. If you are adding a new report, the **Cancel** button will abort the entire report definition. If you are

editing an existing report, the **Cancel** button will cancel all changes, close the Report Wizard, and revert to the previous report definition.

Report Writer Editor

The Report Writer Editor is used to create and modify report definitions in PracticeMaster's Report Writer. Reports that are created or last modified using the Report Writer Editor will be displayed with "Editor" under the **Editor** column of the Table of Contents in the Report Writer window.

The Report Writer Editor consists of a unique toolbar, a file tree in the left pane that can be toggled off or on, and multiple tabs in the right pane that are used to define the various report components.
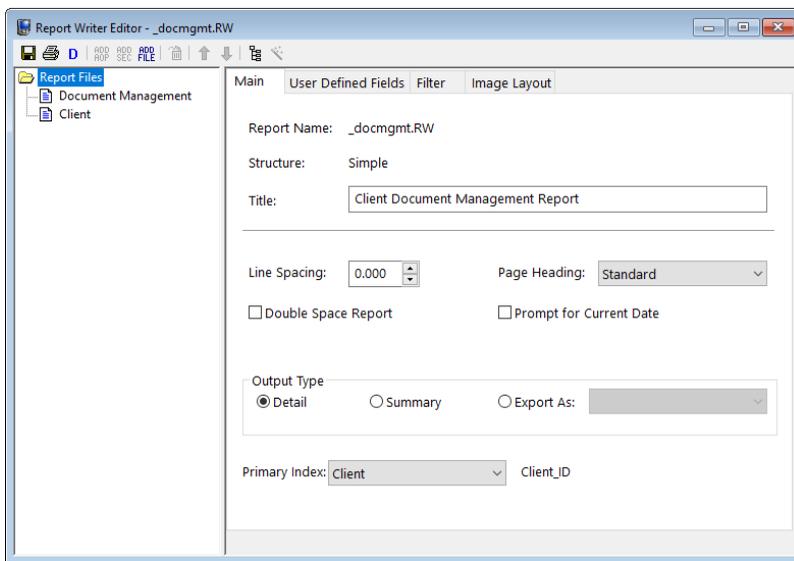

Figure 11, Report Writer Editor window

The Report Writer Editor can be accessed by:

- Clicking the 📄 or 📄 buttons in the Report Writer window to add a new report.
- Selecting an "Editor" report in the Report Writer window and clicking the **Modify** button.
- Right-clicking an "Editor" report in the Report Writer window and selecting the

Modify menu option.

- Clicking the **Editor** button on the **Finish** panel of the Report Wizard.

The following tabs are available in the right pane of the Report Writer window and are used to define the various report components:

- Main
- User Defined Fields
- Filter
- Image Layout

Before we look at the contents of the various tabs in the right pane, let's look at the file tree and toolbar buttons.

Report Writer Editor File Tree

The File Tree pane is shown on the left side of the Report Writer Editor window. The button can be used to toggle the File Tree pane so it is shown or hidden. The File Tree pane is used to specify the files that will be used to retrieve the information for the report. This pane consists of a file tree structure that shows all files included in the report. Each group of files is represented by a branch with a icon. Clicking the icon left of a branch expands the branch to display the various files in that folder. Likewise, clicking the icon left of a branch will collapse its contents.

This tree structure allows easy access to all File Tree activities by right-clicking the appropriate branch on the tree to display the associated menu. Double-clicking a file can be used as a shortcut to display the portion of the detail image layout for that file.

> **Detail Image Note:** In the Report Writer, portions of the layout of a report are referred to as Detail Images. Each report has one or more Detail Images. You can also define Detail Images for a User Defined Page Heading and Sort Headings. Detail Images are defined on the **Image Layout** tab of the Report Writer Editor.

The groups of files included in the tree depend on whether you are working with a ***Simple Report*** or a ***Client AOP Report***. Each file in the report has an associated detail image that can be edited using the **Image Layout** tab.

Simple Report

When working with a Simple Report or Wizard Report, a single group of files will be shown in the File Tree.

Report Files

"Report Files" is the only group of files shown when working with a simple report. The first file selected for a Simple Report is referred to as the primary file. The primary file contains the "core" of the information required for the report.

Additional files can be selected with the following restrictions:

- If the Client file is selected as the primary file, no other file can be selected.
- If you select a lookup file such as the Contact file, Timekeeper file, Transaction Code file, Category file, etc., only that file can be selected.
- Files from different Areas of Practice cannot be used in the same report. Use a Client AOP Report if you want to include information from different Areas of Practice.
- A Simple Report has only one detail image.

Client AOP Report

When working with a Client AOP Report, several groups of files may be shown in the File Tree. Each file is also referred to as a section. Each section consists of a detail image for the specified file.

System Files

Includes only the Client file.

Leading System Files

Includes information from the various client related files. The default Client Summary Report does not include any leading system files.

Area of Practice Files

Includes information from the Area of Practice files associated with the client.

Trailing System Files

Includes information from the various client related files. The default Client Summary Report includes sections for the Journal file, Calendar file, Document Management file, Fee file, and Cost file.

> **Note:** The order of the files within the groups indicates the order they will be printed on the report. However, the primary print order is always: System Files, Leading System Files, Area of Practice Files, Trailing System Files.

Report Writer Editor Toolbar Buttons

The following toolbar buttons are available in the Report Writer Editor. Not all buttons are available at all times.

Save

This button saves the changes to the report definition. Whenever a report definition is saved, PracticeMaster checks the report definition for errors. If errors are found, you will be asked if you want to view an error list. All errors must be resolved before a report definition can be saved.

Print

This button can be used to print the report.

Print Definition

This button can be used to print a report definition for the report.

Add AOP

This button can be used to add an Area of Practice to a Client AOP Report.

Add Section

This button can be used to add a section to a Client AOP Report definition.

Add File

This button can be used to add a file to a Simple Report.

Add Field	This button can be used to display the Select Field window, allowing you to add a field from a file, a system field, or a user defined field. This button is also used to add a new user defined field on the **User Defined Fields** tab.
Add Sort Region	This button can be used to add an ascending or descending sort region to a report definition.
Add Text	This button can be used to add a Text Item. A Text Item is a user defined string of characters. Text Items are commonly used to define column headings for reports in Non-Column mode. The new item is inserted in the position following the selected item.
Delete	This button can be used to delete the selected item.
Cut	This button, or Ctrl+X, can be used to cut the contents of the selected item to the Windows Clipboard.
Copy	This button, or Ctrl+C, can be used to copy the contents of the selected item to the Windows Clipboard.
Paste	This button, or Ctrl+V, inserts the item from the Windows Clipboard at the pointer position in the active window.
Move Item Up	This button, or Shift+Up-Arrow, can be used to reposition the selected item by moving it up one position.
Move Item Down	This button, or Shift+Down-Arrow, can be used to reposition the selected item by moving it down one position.
Move Left	This button can be used to move the selected item left one item.

Move Right

This button can be used to move the selected item right one item.

Insert Space

This button can be used to insert a blank space before the selected item.

Remove Space

This button can be used to delete a blank space before the selected item.

Non-Column Mode

This button can be used to change a report to Non-Column Mode.

Column mode

This button can be used to change a report to Column Mode.

Hide/Show Tree

This button acts as a toggle switch to hide or display the File Tree.

Launch Wizard

This button can be used to launch the Report Wizard for the selected report.

Help

This button, or F1, displays Help for the current window.

Main Tab

The **Main** tab of the report definition is always shown first and is used to define the following information. The **Report Name** and **Structure** as defined via the Report Name window are shown for reference purposes and cannot be edited.
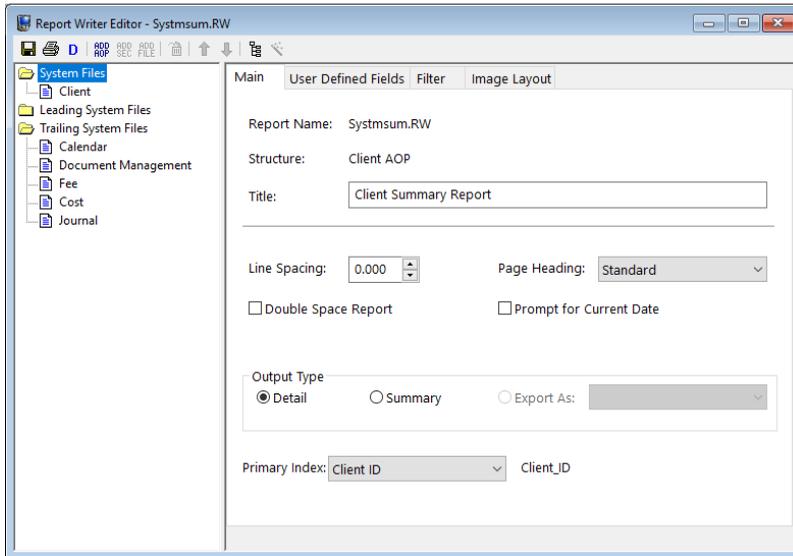

*Figure 12, Report Writer Editor - **Main** tab*

Title

Maximum of 35 characters. The Title is used in the Table of Contents and is also used as the default report heading if the **Standard** Page Heading is selected.

> **Note:** If you want to use a report title greater than 35 characters, you must define a custom page heading. To do so, change the Page Heading option to **User Defined**. Then use the **Image Layout** tab to define the user defined page heading.

Line Spacing

The Line Spacing field determines the amount of space between all lines on the report. A minimum of 0.000 inches up to 0.999 inches can be specified. This field gives you greater control over the line spacing above and beyond specifying double spacing.

The default is 0.000, which indicates standard line spacing. When 0.000 is specified, the normal line spacing associated with the specified font is used.

When a Line Spacing greater than 0.000 is specified, this amount determines the amount of space from the bottom of one line to the bottom of the next line. If the amount specified is too small, the lines on the report will overlap. This setting applies to all printed lines on the report.

> **Note:** You can select the **Double Space** check box if you simply want to double space the body of the report.

Page Heading

The Page Heading determines the format of the heading that will print at the top of each page of the report. The default Page Heading is Standard.

None - None indicates no page heading will be used.

Standard - The standard page heading consists of two lines. The first line includes the system date, the Title and the page number. The second line consists of the firm's name defined in the Firm Information window in System Configuration. The following is an example of a standard page heading.

| 08/23/2022 | Alphabetical List of Active Clients | Page: 1 |
| | Jensen, Martin & Anderson, P.C. | |

User Defined - User defined page headings are defined on the **Image Layout** tab.

> **Tip:** When defining a non-column report that has column headings and you want the column headings to appear at the top of each page, define a User Defined page heading that includes the column headings.

> **Note:** If User Defined is selected for the Page Heading and a User Defined Page Heading is not defined, no page heading will be used.

Double Space Report
Select this check box if you want the report double spaced. Double spacing applies to the entire report except for standard page headings and column headings.

Clear this check box if you want the report single spaced.

> **Note:** You can use the Line Spacing field to increase the amount of space between all lines on the report.

Prompt for Current Date
Select this check box if you want the user to be prompted for the current date when the report is run. This date will be used in lieu of the system date for any date functions.

Clear this check box if you want the system date to be used for the current date.

Output Type
The Output Type determines the format of the finished report. The default Output Type is **Detail**.

Detail - The Detail type includes detailed records and all specified totals, headings, averages, etc.

Summary - The Summary type excludes individual detailed records but includes totals, headings, averages, etc.

Export As - The **Export As** type is commonly used when saving the report to a file for use with other

software applications. When this option is selected, you have the following options:

> **Note:** When exporting fields, the entire field is exported regardless of the Field Width specified.

Comma Quote Delimited
The **Comma Quote Delimited** format is a standard comma delimited ASCII text file. The following field types are exported as quoted strings: Alpha, Contact, Email, Enhanced Virtual, File, Lookup, Memo, Phone, User, Virtual, and Web Page.

Boolean fields are exported with whatever is specified in the True Text or False Text fields of the properties for the field.

Client ID fields are exported as 12-character fields, right justified with leading spaces for numeric Key Type, or left justified for Alpha or Mixed Key Type.

Date fields are exported using either the "mm/dd/yyyy" or "mm/dd/yy" format depending on how the Date Format is configured for the properties of the field.

Time fields are exported using the "hh:mm" or "hh:mm AM" format depending on how the Time Format is configured for the properties of the field.

WordPerfect Mail Merge
The **WordPerfect Mail Merge** format is used to create a WordPerfect® secondary merge file. Each record is separated by a Merge E (^E followed by a hard page). Each field is separated by a Merge R (^R followed by a hard return).

MS Word Mail Merge
The **MS Word Mail Merge** format is used to create a Microsoft® Word Mail Merge file. This file format is similar to the comma quote delimited file with the following exceptions: 1) a header record is added to the beginning of the file that lists the field names;

and 2) all double quotation mark characters are replaced with two double quotation mark characters.

Primary Index

Specifying a different index can often help a report process more quickly. By default, reports use the key index as the default index. This may or may not be the most efficient index for the report you are creating. If your report takes a long time to run, consider trying a different index. You may want to add a new index that matches the type of sorting your report requires.

If the primary index handles the sorting desired, there is less need to define a Sort Region for the report because the records are automatically accessed in the desired order. However, sort regions may be required for headings, totals, or other formatting purposes.

For example, a Client List uses the Client File whose default index is the Client ID index. However, if the Client List you are designing is in alphabetical order, it will be more efficient to select an index that uses an alpha sort.

As another example, if you are defining a calendar report that shows calendar entries for a specific user, you would want to select a Primary Index that sorts the calendar entries by user.

Indexes are defined in File Maintenance on the **Index** tab of the File Definition window.

This field is not available until a file has been added to the report.

> **Note:** Default beginning and ending values will be included on the **System** tab of the Select Field window for the first sort order of the specified index. When the report is run, the user will automatically be prompted for these beginning and ending values. For example, if the first sort order of the Primary Index is user, then the user will automatically be asked for the beginning and ending User ID.

> **Note:** Changing the Primary Index can cause unexpected results if the BEG_RANGE and END_RANGE system fields are used.

User Defined Fields Tab

The **User Defined Fields** tab is used to define custom fields. User defined fields can be used in the Image Layout, user defined page headings, and sort regions. They can also be used within another user defined field. There is no limit to the number of user defined fields that can be created.

The value of a user defined field can be set up in one of two ways:

- Entered by the user when the report is run
- Determined by the Expression entered in the Default Value of the user defined field
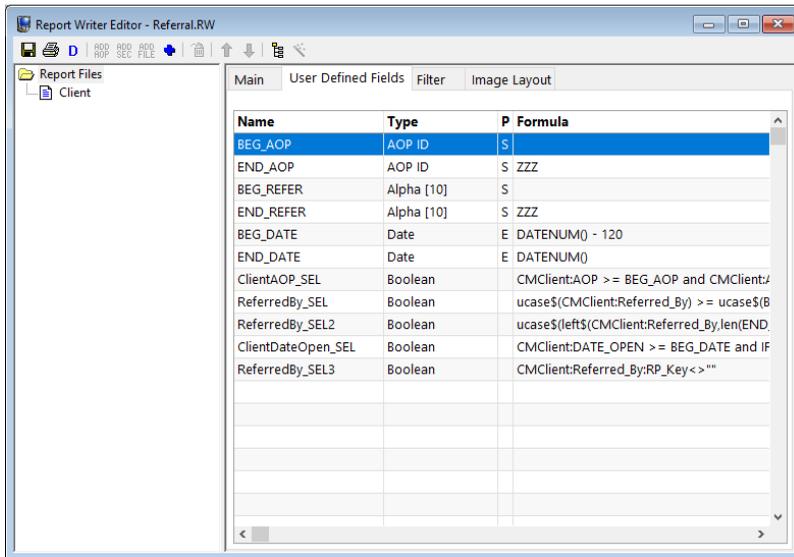
*Figure 13, Report Writer Editor - **User Defined Fields** tab*

The **User Defined Fields** tab is a list of user defined fields. Each row consists of a single user defined field. You can use the PgUp, PgDn, Up-Arrow, Down-Arrow, Left-Arrow, Right-Arrow, Home, and End keys to scroll through existing user defined fields. Scroll bars can also be used to scroll through the list of user defined fields. You can change the sort order of fields by clicking a column heading.

Double-clicking a user defined field in the list will open the User Defined Field Properties window for the field. The following figure is an example of a User Defined Properties window.
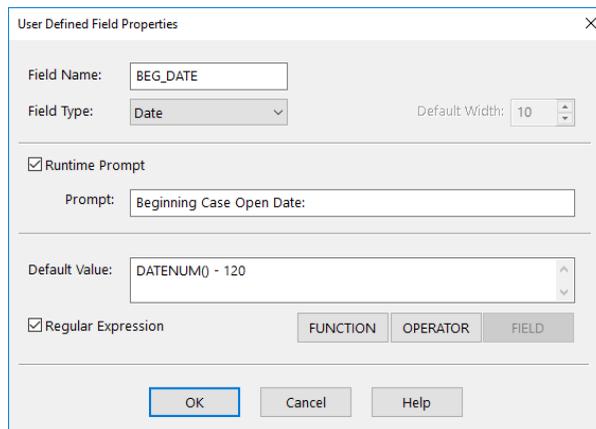

Figure 14, User Defined Field Properties window

Field Name (or "Name" in the list)

The user defined field name. Maximum 20 characters. The Field Name is used to identify the user defined field within the report definition. Characters that can be used include A-Z, 0-9, and the underscore character. The first character must be a letter.

Field Type (or "Type" in the list)

The field type of the user defined field. The Field Type determines the type of information that can be entered in the user defined field. The Field Type also determines which functions and operators can be used in the Default Value as well as for the Properties window when a user defined field is added to the Detail Image Layout. The available field types are Alpha, Contact, Short Integer, Integer, Number, Money, Boolean, Date, Time, Client ID, User, and Character.

Default Width

Maximum of 128 characters. The Default Width only applies when the Field Type is Alpha. The Default Width determines the following:

- When the Runtime Prompt check box for the user defined field is checked, the Default Width determines the maximum number of characters that can be entered by the user when the report is run.
- When the user defined field is used in the Image Layout, the Default Width determines the default Field Width.

> **Note:** The Default Width is ignored when using an Output Type of Export As.

Runtime Prompt (or "P" in the list)

This check box determines whether the user will be prompted to enter a value for the user defined variable at runtime.

Select this check box if you want the user to be prompted to enter the value of the user defined field when the report is run. The label used for the prompt can be specified in the Prompt field. If desired, a default value can be specified in the Default Value field. When the user prints the report, all user defined variables whose Runtime Prompt check box is selected will be displayed in a Runtime window, allowing the user to specify a value before the report is processed.

Clear this check box if you do not want the user to be prompted to enter information. When this check box is cleared, the Prompt field becomes unavailable.

> **Note:** The "P" column on the list of the **User Defined Fields** tab includes an "S" (string) or an "E" (expression) or is blank. When it is blank, the Runtime Prompt check box is not selected. When it is "S," the Runtime Prompt check box is selected and a string is entered in the Default Value field. When it is "E," the Runtime Prompt check box is selected, the Regular Expression check box is selected, and an expression is entered in the Default Value field.

Prompt

Maximum of 50 characters. The **Prompt** field is available only when the **Runtime Prompt** check box is selected. This field represents the label of the runtime prompt that will be seen by the user at runtime.

Default Value

The information stored in this field represents the initial value of the field. Whether this value can be overwritten by the user depends on how the **Runtime Prompt** check box is set.

If the **Runtime Prompt** check box is selected and the **Regular Expression** check box is not selected, then the value in this field will be used as a default

value for the prompt at runtime, allowing the user to accept or overwrite this default value. In this situation, an "S" for string will be shown in the P (Prompt) column on the **User Defined Fields** tab.

If the **Runtime Prompt** check box is selected and the **Regular Expression** check box is selected, then the **Default Value** represents an expression that should be evaluated and used as the default value for the prompt at runtime, allowing the user to accept or overwrite this value. In this situation, an "E" for expression will be shown in the P (Prompt) column on the **User Defined Fields** tab.

If the **Runtime Prompt** check box is not selected, then the default value simply represents the initial value of this field. The contents will be evaluated as an expression. The user will not be asked for a value for this field.

Expression
The contents of the Default Value may include an expression if the Regular Expression check box is selected. An expression contains a formula that determines the value of the field. The formula entered can include fields, operators and functions as well as text.

- The **FUNCTION** button can be used to open the Available Functions window, allowing you to select the desired function.

- The **OPERATOR** button can be used to open the Available Operators window, allowing you to select the desired operator.

- The **FIELD** button can be used to open the Select Field window, allowing you to select the desired field from a file, system field or user defined field.

> **Note:** The "Formula" column on the list of the **User Defined Fields** tab represents the Default Value or Expression for the user defined field.

Regular Expression

The **Regular Expression** check box determines whether the contents of the **Default Value** field will be evaluated as an expression.

If the **Runtime Prompt** check box is cleared, this check box is automatically selected, thus causing the **Default Value** to be evaluated as an expression.

If the **Runtime Prompt** check box is selected, you can use an expression to calculate the default value or you can simply enter the default value.

Select the **Regular Expression** check box if you want the contents of the **Default Value** field evaluated as an expression.

Clear the **Regular Expression** check box if you simply want to set an initializing value without having any calculations performed.

When the **Regular Expression** check box is selected, the **FUNCTION**, **OPERATOR** and **FIELD** buttons are available to help build an expression.The **FIELD** button can be used to open the Select Field window, allowing you to select the desired field from a file, system field or user defined field.

The **OK** button can be used to save the changes, close the Properties window and update the **User Defined Fields** tab. When saving a user defined field, you may receive a "Type Mismatch" error. This error must be resolved before the user defined field can be saved. This error is usually the result of having a mismatched Field Type and Default Value. For example, if a function is performed on an alpha field but returns a numeric value, then the Field Type must be configured as Numeric. If the field is configured as alpha, it will generate a "Type Mismatch" error.

The **Cancel** button can be used to close the Properties window without updating the **User Defined Fields** tab.

Filter Tab

The **Filter** tab lets you define a query expression to specify selection criteria that are used to determine whether or not a record should be included on the report. Query expressions are Boolean expressions which are evaluated as being true or false.

*Figure 15, Report Writer Editor - **Filter** tab*

And/Or

The **And/Or** column is used to select **And** or **Or** for the queries. This field is not available for the first query.

Select **And** if you want the previous query and the current query to be true in order for the record to be selected.

Select **Or** if you want the previous query or the current query to be true in order for the record to be selected.

> **Note:** Multiple queries are tested in the order they are presented. You can use the **Move Up** and **Move Down** buttons to change the order of queries as desired.

Field Name

The **Field Name** column is used to specify the desired field from the file. The drop-down button can be used to open the Select Field window.

> **Note:** A Field Name must be selected before being able to specify any other fields in the row.

Test Condition

You can select one condition per query. The following test conditions are available:

- Equal To
- Not Equal To
- Greater Than
- Greater Than or Equal To
- Less Than
- Less Than or Equal To
- Contains (Alpha fields only)
- Does Not Contain (Alpha fields only)
- is TRUE (Boolean fields only)
- is FALSE (Boolean fields only)

Test Value

The information that can be entered in the Test Value field depends on whether the Field Name specified is alpha, numeric, date, time, or Boolean. Enter the value you want used for comparison purposes.

- **Alpha** - Alpha strings are allowed when the field is alpha. Maximum of 128 characters.
- **Numeric** - Maximum of 14 characters (including decimal point and minus sign, if used).
- **Date** - An "mm/dd/yyyy" format is used for date fields.
- **Time** - An "hh:mm p.m." format is used for time fields.

- **Boolean** - A value of "1" is used for true and a value of "0" is used for false.

The **New Row** button can be used to add a query to the query expression. After selecting the Field Name, use the tab key or the mouse to place focus in the different columns to select the other fields in the row.

The **New Advanced Row** button opens the Advanced Expression Editor window. Once an Advanced Expression has been saved, you can click anywhere in the row to edit the expression.

The **Delete** button can be used to delete the selected query. Any subsequent queries will be moved up one position.

The **Move Up** button can be used to move the selected query up one row.

The **Move Down** button can be used to move the selected query down one row.

> **Note:** Additional information regarding functions, operators, expressions, and the Select Field window can be found in Help.

Advanced Expression Editor

The Advanced Expression Editor window is opened by clicking the **New Advanced Row** button. The Advanced Expression Editor window lets you define an expression for filtering purposes. Query expressions are Boolean expressions which are evaluated as being true or false.
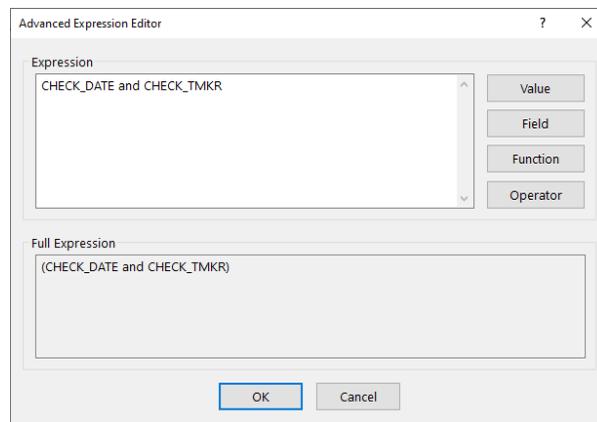

Figure 16, Advanced Expression Editor window

Expression	The **Expression** field provides the option to enter a custom expression. You can type in an expression or use the **Value**, **Field**, **Function**, and **Operator** buttons to build an expression. There is no limit to the length of the expression.

The **Value** button can be used to open the Value window, allowing you to enter a value to insert into the expression.

The **Field** button can be used to open the Select Field window, allowing you to select the desired field from the file.

The **Function** button can be used to open the Available Functions window, allowing you to select the desired function.

The **Operator** button can be used to open the Available Operators window, allowing you to select the desired operator.

The **Full Expression** field displays the full expression for the filter thus far. This field is updated immediately upon any change to the **Expression** field and displays a representation of all previous queries AND the full expression prior to saving. The **Full Expression** field is not editable; however, you can copy any portion of the field to the clipboard.

Image Layout Tab

The **Image Layout** tab includes an Image Layout Editor that lets you define each item that will be used on the report and where it will be positioned. The Image Layout Editor uses a graphical user interface complete with drag-and-drop capabilities. This tab is used to define the Detail Image, Sort Regions, and user defined page headings.
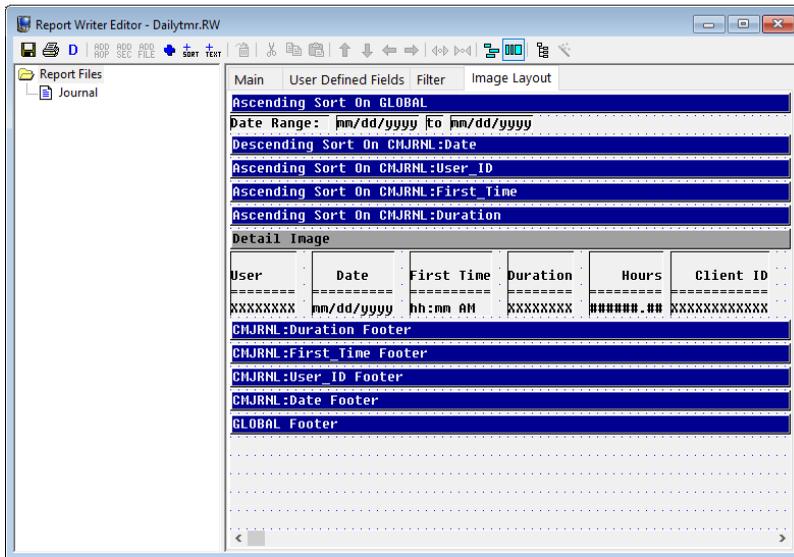
*Figure 17, Report Writer Editor - **Image Layout** tab*

The Image Layout Editor shows an image of the information as it will be portrayed on the report. This image is updated each time an item is added, changed, moved, or deleted. The background of the Image Layout Editor shows dots in a grid-like pattern, thereby assisting with alignment of the various items on a page. The toolbar buttons and right-click menus can be used to access the various activities in the Image Layout Editor.

The various items added using the Image Layout Editor are categorized by region. Each region has a heading bar. When adding or editing an item in a region, a properties window will be displayed.

The arrow keys can be used to select an item. When selected, items are shown in yellow. The arrow buttons on the toolbar can be used to reposition a selected item. Double-clicking an item or pressing the Enter key when an item is selected displays a Properties window, allowing you to edit the associated item. The Home key will display the top of the detail image.

The fields in a Properties window vary depending on the field type and whether the report is in column mode or non-column mode. Complete details regarding the various fields in the Properties window can be found in the Help provided with PracticeMaster.
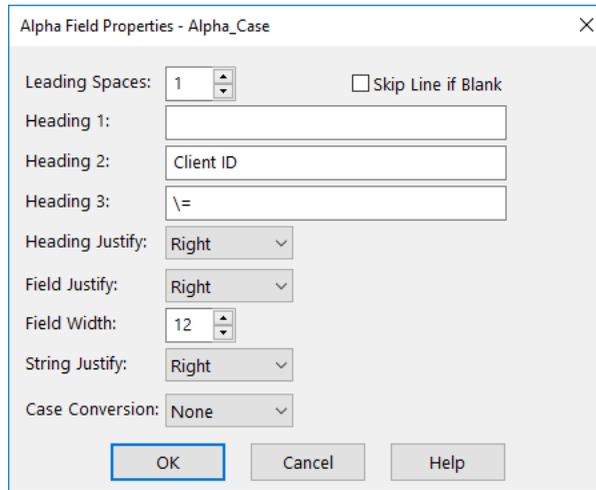
Figure 18, Field Properties window

There is no limit to the number of items that can be added to the Detail Image.

Legend

The following contains information regarding symbols that may be seen in the Image Layout Editor. Column Headers are shown if Column Mode is selected. The various field types show different symbols:

- Alpha fields (including Alpha, Email, Enhanced Virtual, File, Memo, Phone, Lookup, Virtual, and Web Page fields) are portrayed by an uppercase "X" (or uppercase "W" representing wrapping). A single character alpha field is portrayed by an uppercase "C" (i.e., a Character field).

- Contact fields are portrayed by an uppercase "R" (or uppercase "W" representing wrapping).

- Numeric fields (including Number and Money fields) are portrayed by the "#" character. Commas and dollar signs may be displayed if selected in the Properties window. Minus signs, parentheses, or "cr" characters may be included in numeric fields if negative numbers are allowed.

- Date fields are portrayed by "mm/dd/yy" or "mm/dd/yyyy" depending on the format specified.

- Time fields are portrayed by "hh:mm" or "hh:mm AM" depending on the format specified.

- Boolean fields are represented by the largest possible value specified in the True Text or False Text fields.
- Client ID fields are represented by "A" (alpha), "N" (numeric), or "M" (mixed).
- User ID fields are represented by "U".

A vertical red line that spans the entire height of the report indicates a width of 256 characters.

A vertical red line that is only one row high between two items indicates that the two items are touching.

Status Bar

The status bar shows information regarding a selected item or region.

Region
When a heading bar of a region is selected, the status bar indicates the width of the region in columns, the height of the region in rows, and the number of items in the region.

Item
When an item is selected, the status bar indicates the name of the item, the item number within the region, and the starting column position of the item.

Image Layout Editor Right-Click Menu Options

The following represents a list of right-click menu options available in the Image Layout Editor of the Report Writer Editor.

Add Field
The **Add Field** menu option or the ✚ button can be used to display the Select Field window, allowing you to add a field from a file, a system field, or a user defined field.

Add Sort Region
The **Add Sort Region** menu option or the ⊞ₛₒᵣₜ button can be used to add an ascending or descending sort region to a report definition.

Add Text	The **Add Text** menu option or the ![icon] button can be used to add a text item. A Text Item is a user defined string of characters. Text Items are commonly used to define column headings for reports in Non-Column Mode. The new item is inserted in the position following the selected item.
Change Field Name	The **Change Field Name** menu option can be used to change the field name. Once a field has been added, you can edit the Properties for the field; however, you cannot change the name via the Properties. This menu option eliminates the need to delete an item and re-add it with the new field name.
Cut	The **Cut** menu option or the ![icon] button or Ctrl+X can be used to cut the contents of the selected item to the Windows Clipboard.
Copy	The **Copy** menu option or the ![icon] button or Ctrl+C can be used to copy the contents of the selected item to the Windows Clipboard.
Paste	The **Paste** menu option or the ![icon] button or Ctrl+V inserts the item from the Windows Clipboard at the pointer position in the active window.
Delete	The **Delete** menu option or the ![icon] button can be used to delete the selected item.
Move Up	The **Move Up** menu option or the ![icon] button or Shift+Up-Arrow can be used to reposition the selected item by moving it up one position.
Move Down	The **Move Down** menu option or the ![icon] button or Shift+Down-Arrow can be used to reposition the selected item by moving it down one position.
Move Left	The **Move Left** menu option or the ![icon] button can be used to move the selected item left one item.

Move Right	The **Move Right** menu option or the ➡ button can be used to move the selected item right one item.
Insert Space	The **Insert Space** menu option or the ◀◑▶ button can be used to insert a blank space before the selected item.
Delete Space	The **Delete Space** menu option or the ▶◀ button can be used to delete a blank space before the selected item.
Join Lines	The **Join Lines** menu option is used to delete a line break before the selected item. This option is available in Non-Column Mode only.
Break Line	The **Break Line** menu option is used to insert a line break before the selected item. This option is available in Non-Column Mode only. You must add an item for the following line before you can add a break. To create a blank line as the last item in an image, add a 1-character text item with no text and insert a line break before the blank text item.
Properties	The **Properties** menu option will display a Properties window for the selected item, allowing you to edit the item.

User Defined Page Headings

The type of Page Heading used in a report is defined in the Page Heading field on the **Main** tab of the Report Writer Editor. Page Heading options consist of Standard, User Defined, or None. When a User Defined Page Heading is specified, it is created via the Image Layout Editor tab.

▶ To define a User Defined Page Heading

1. Select the desired report in the Report Writer window.

2. Click the **Modify** button.

3. In the Page Heading field of the **Main** tab, click the drop-down button and select User Defined.

4. Click the **Image Layout** tab.

5. Select the **Page Heading** heading bar.

6. Use the ✚ button to add the desired fields to the **Page Heading** region. Typical items in a page heading might consist of any of the following System Fields:

    FIRMNAME$, DATE, TIME, PAGENO, etc. Use the ⊞TEXT button to add any text labels to the Page Heading region. Typical text in a page heading might consist of a label for the page number such as "Page No.: " and a label for the Date.

7. Once all items have been entered, click the 🖫 button to save the report definition.

> **Tip:** To create a blank line as the last item in an image, add a 1-character text item that has no text and insert a line break before or after the blank text item.

Sort Regions

Sort regions are used to define sort levels, page breaks and totaling. For each sort region defined, a heading image can be defined as well as subtotal text and the format of the subtotal. A page break or a certain number of lines can be specified following a break. Sort regions can have heading images, subtotal text, or both. There is no limit to the number of sort regions that can be defined for each report. The order that the sort regions are listed in reflects the order of the sorting performed.
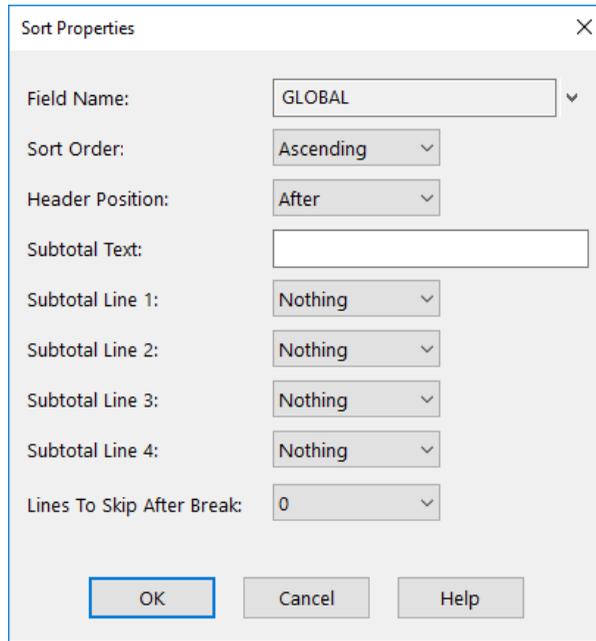
Figure 19, Sort Properties window

Note: Subtotals or averages will print for any numeric items that have been set up to do so in their Properties. This is done by specifying the appropriate value for the Accumulate field. When defining the Sort Region, you can specify the text that will print to the left of the results and the format of the results (i.e., whether underscores or double underscores or blank lines are placed below or above the results).

After selecting to add a sort, a Sort Properties window will be displayed. The following fields are available in the Sort Properties windows for each sort region defined:

Field Name

The **Field Name** is automatically assigned when you add a sort region. When adding a sort region, the Select Field window will be displayed, allowing you to specify the field you want the sort based on. The field specified will be used as the Field Name.

The **Field Name** can be changed. The drop-down button can be used to display the Select Field window to select a different field on which to sort.

Sort Order

The **Sort Order** determines whether sorting is in **Ascending** or **Descending** order. The default Sort Order is Ascending.

Select **Ascending** if you want the specified field sorted in ascending order (A-Z).

Select **Descending** if you want the specified field sorted in descending order (Z-A).

> **Note:** When defining a Global Sort Region, it makes no difference whether the Sort Order is Ascending or Descending.

Header Position

Use this option to specify whether you want the column headings repeated for each break. The default is **No Header**.

Select **No Header** if you do not want the column headings to print following each break.

Select **Before** if you want the column headings for the detail image to print before each break.

Select **After** if you want the column headings for the detail image to print following each break. Column headings will also print at the top of each page of the report.

> **Note:** The **Header Position** option applies only when the report is in Column Mode.

Subtotal Text

Maximum of 128 characters. Enter the text to print on the subtotal line prior to the results. This line prints on the same line that the results print on (provided the width of the text does not exceed the column width).

Subtotal Lines 1-4

Up to four lines can be used to format the results portion of the subtotal. The Subtotal Lines are used for formatting the subtotal.

Select **Nothing** if you do not want anything to print on the specified line of the subtotal format.

Select **Blank** if you want a blank line to print on the specified line of the subtotal format.

Select **Underline** if you want a row of dash characters (i.e., "-") to print on the specified line of the subtotal format.

Select **Double** if you want a row of equal sign characters (i.e., "=") to print on the specified line of the subtotal format.

Select **Results** if you want the results to print on the specified line of the subtotal format.

Lines To Skip After Break   Specify the number of blank lines or a new page to be printed following each break for the specified sort.

Select **0** if you do not want any blank lines to print after a break.

Select **1**, **2**, **3**, or **4** to specify the number of blank lines you want printed following a break.

> **Note:** Blank lines following a break are only printed if a subtotal is printed.

Select **Page Break** if you want a new page following a break.

The **OK** button will save the sort region.

The **Cancel** button will close the window without saving any changes.

GLOBAL System Field

The Global System Field is used when defining the Global Sort Region in the Image Layout. The Global Sort Region is not used to select a sort order. Sorting on the Global system value provides a way to add grand totals and/or a sort heading that applies to the entire report. The Global Sort Region can also be used for accumulating and printing final totals or averages. The Global Sort Region is used to define the text on the subtotal line, as well as the type of underscore and number of blank lines before and after the total.

Information included in an image that will only print on the first page of the report typically consists of the parameters specified by the user when running the report. This additional information is printed below the page heading. The information provided in a Global Sort Region could be included in a user defined page heading; however, it would then print on every page of the report as opposed to just the first page.

If used, the Global Sort Region should be the first Sort Region shown in the Image Layout.

> **Tip:** If you want column headings to appear only at the beginning of the first page, define the column headings in the global sort image instead of the detail image.

Client Summary Report

The Client Summary Report is a summary of all information that has been entered for a specific client. It consists of several sections including general client information, Area of Practice specific information, journal information (timer, phone, research, note, and email records from PracticeMaster and billing notes from Tabs3 Billing), calendar entries, document management entries, fee entries, and cost entries. Client Summary Reports are created and generated using PracticeMaster's Report Writer. Unique Client Summary Reports can be created for each Area of Practice. Client Summary Reports can be customized as desired.

Depending on how your Client Summary Report definitions are coded, it is possible to use the same Client Summary Report for all clients. You can also run Client Summary Reports for multiple clients at the same time.

PracticeMaster comes with two special Client AOP Reports that can be used as a basis for your own Client Summary Reports:

SYSTMSUM.RW
This specially provided Client AOP Report definition includes coding for all system file sections. Coding for Area of Practice Files is not included.

CLNTSUM.RW
This specially provided Client AOP Report definition includes sections for system files and Area of Practice Files. Sections for Area of Practice Files will only show for clients within that specific Area of Practice. For example, if you run this report for a Tax client, information for the system files and Tax Area of Practice Files will be included.

Creating a Client Summary Report

The following scenarios provide steps on creating, copying, and editing a Client Summary Report.

Creating a New Client Summary Report

Besides using the precoded Client AOP Reports provided with PracticeMaster, you can also generate your own Client Summary Report "on the fly." A Client Summary Report that is created on the fly can be generated by:

- Right-clicking the Report Writer window and selecting **Print Client Summary Report**.

- From the Reports Task Folder, select Client Summary Report.

You can use the button in the Report Writer Editor to generate the same on-the-fly Client Summary Report, save it and customize it as desired.

> **Tip:** The easiest way to work with the Client Summary Report is to always use the CLNTSUM.RW report for all clients. Customize the sections for the system files and existing Area of Practice sections as required. If you add a new Area of Practice, add a new Area of Practice section to this report and customize it as required.

Creating a New Client Summary Report Based on an Existing Report

You can copy the existing CLNTSUM.RW report, and then further edit the report definition as needed. This option keeps the original report available to run as necessary, or to copy again as a base for other reports.

▶ **To create a new Client Summary Report based on an existing Client AOP Report**

1. From the Report Writer window, select the CLNTSUM.RW report.
2. Right-click the Report Writer window and select **Copy**.
3. Enter the new report name and click **OK**.
4. Select the new report.
5. Click **Modify**.
6. The Report Writer Editor will be opened, allowing you to edit the report as desired.

Adding a New Area of Practice to an Existing Client AOP Report

If there is an existing Client Summary Report you want to run with the addition of specific AOP fields, you do not need to create a new report. Instead, you can add an AOP to the existing report.

▶ **To add an Area of Practice to an existing Client AOP Report**

1. In the Quick Launch, search for and select "Report Writer."

2. From the Report Writer window, select the desired Client Summary Report.

3. Click **Modify**.

4. The Report Writer Editor will be opened, allowing you to edit the report.

5. In the File tree, right-click **System Files** and select **Add Area of Practice**. Your new Area of Practice section will be added to the bottom of the File tree.

6. Use Shift+Up-Arrow to position the Area of Practice to the desired position.

7. Right-click the Area of Practice you just added and select **Fill Area of Practice**. A section for each file in the specified Area of Practice will be added.

8. You can edit any section as desired. To edit a section, select the file and click the **Image Layout** tab. Double-click any item to display its properties.

9. After you have completed editing, click 🖫 to save the report definition.

Rebuild Table of Contents

The 🖳 button or the **Rebuild** right-click menu option can be used to rebuild the table of contents. Running this utility deletes the current table of contents file and rebuilds a new one based on all existing report definitions (i.e., files in the \CMREPORT directory that have a file extension of ".RW").

After starting the rebuilding process, you will be asked to confirm that you want to rebuild the Table of Contents. Once confirmed, the rebuild process will begin and a progress indicator will be shown. The rebuild process takes a matter of seconds to complete and cannot be aborted once started. Running this utility does not delete any data. It can be run multiple times without having any adverse effect.

Why would I want to rebuild the Table of Contents?

Typically, you shouldn't have to rebuild the Table of Contents. The most common reason for having to rebuild is when you receive a report definition from a third party. For example, if your consultant creates a new report definition for you, the report definition file would have to be transferred to the \CMREPORT directory. Once transferred, in order to access it via the Report Writer window, it would have to be present in the Table of Contents file. Since this report wasn't created by the PracticeMaster system, it is not present in your Table of Contents file. Therefore, the Table of Contents must be rebuilt in order to include the new report definition.

Anatomy of a Custom Report

The following figure depicts an example of a Client Expense Summary Report and portrays the various parts of the report. The Client Expense Summary Report was created using the Report Writer feature in PracticeMaster.

Notice that each client is considered a sort grouping. Each sort consists of a Sort Image (i.e., a Sort Heading), Detail Headings (for column reports only), Detail Image, Sort Total, and Sort Break. The Global Image and Global Totals only print once for each report. The Page Heading prints at the top of each page of the report (the Global Image will not print on subsequent pages of the report).

Conclusion
Resources

The PracticeMaster Custom Report Writer provides the ability to create reports based on your firm's needs. Additional features discussed in this guide can be found in the PracticeMaster Help. Simply press F1 from anywhere within the software to open the Help information for that particular topic.

Report Pack

Additional guides and resources for other software features are also available, including the following:

- **PracticeMaster Report Pack** - Examples of each Report Writer Report included with the software can be found in the PracticeMaster Report Pack.

All guides and report packs are available on our website at:

Tabs3.com/support/docs.html

Knowledge Base

Our Knowledge Base can be accessed 24 hours a day, 7 days a week. You can access the Knowledge Base in the Quick Launch by searching for and selecting "Knowledge Base." The following Knowledge Base articles provide additional Report Writer information.

Article ID	Article Title	Article Description
R11446	Working with PracticeMaster Report Writer	Walks you through creating a report and provides information on optimizing report writer reports, common situations, and troubleshooting.
R10931	PracticeMaster Report Writer Frequently Asked Questions	Provides answers to frequently asked questions about PracticeMaster Report Writer.
R11493	All About Expressions	Provides an in-depth look at what expressions are, where they are used, terminology, creating both basic and advanced expressions, examples, and tips.
R11515	Filter Expression Examples	Provides more than 50 examples of how filters can be used.
R10750	PracticeMaster Report Writer, Filter, and WorkFlow Functions	Provides a list of available functions in PracticeMaster, as well as a link to a PDF that provides information on how each function can be used in the software.
R10733	PracticeMaster Report Writer, Filter, and WorkFlow Expression Errors	Discusses how to interpret error information shown on the Error Report and includes a list of common error messages.

All Knowledge Base Articles are available on our website at:

support.Tabs3.com

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