CSP / PRACTICE CS REPORTS COMPARISON

This document matches reports from Creative Solutions Practice® (CSP) with the corresponding reports from Practice CS.® The Comment column provides more specifics about the reports.

List reports

CSP	Practice CS	Comment
Client Address List	List of Clients List of Client Groupings Client Listing w/ Mailing Address † Client Listing w/ Client Name 1 †	
Client Alpha List	List of Clients Many client listing reports in the Practice CS Library portlet †	
Client Phone Narrow	List of Clients Many client listing reports in the Practice CS Library portlet †	
Client Phone Number List – Wide	List of Clients List of Client Groupings Client Listing (Phones / Email) †	
Client Phone Number List – Alpha	List of Clients Client Listing (Phones / Email) †	
Client/Engagement List by Client ID	List of Client/Engagements Recurring Bills †	
Staff Alpha List	List of Staff Groupings	The CSP report does not include grouping information; the Practice CS report does.
Staff List by Level by ID	List of Staff Billing Rates	The CSP report can be duplicated in Practice CS by grouping by staff level.

CSP	Practice CS	Comment
Work Code List by Group	List of Activities grouped by activity category.	The CSP report shows more detail of work code setup than the Practice CS report.
Work Code Short List by Group	List of Activities grouped by activity category.	
Standard Text Listing	List of Standard Text	To access this report in CSP, choose Tasks / Master Files / Standard Text, then click the Report button.

† Denotes a report that can be imported from the Practice CS Library portlet

Client Management reports

CSP	Practice CS	Comment
A/R Ledger	Accounts Receivable Ledger	
Billing to Production Comparison	No equivalent *	
Calendarized Activity	Calendarized Activity † Calendarized Activity – With Collected †	**Notes** - Can show 24 periods using two detail lines - The 24 Period History on the Client and Firm dashboards also provides this information but cannot be printed.
Client Analysis by Work Code by Staff	Production Analysis detailed by staff and grouped by client, engagement, activity.	
Client Summary	Client Summary †	
Client Write-Ups / Downs	Write-Ups and Write-Downs †	
Monthly Report	Work-in-Process Summary detailed by activity and grouped by client, activity category	
Invoice Report	Accounts Receivable Applications	The CSP report is accessed by clicking the Invoice button in the Client master file.
Outstanding Prepayments	Open Receipts & Adjustments †	

† Denotes a report that can be imported from the Practice CS Library portlet
* May be able to create this report using custom formats in Practice CS

Billing reports

CSP	Practice CS	Comment
Detail Worksheet	Billing Worksheet Detail Worksheet †	
Invoice Activity	Accounts Receivable Applications	
Invoice Journal	Invoice Journal	
Summary Worksheet	Summary Billing Worksheet †	
Work Code Analysis	Billing Analysis detailed by activity, grouped by activity category.	
WIP Summary	Work-in-Process Summary	
Invoice Detail Report	Invoice Journal report with invoice detail included	The CSP report is accessed by choosing Search / Saved Invoices and clicking the Report button. The Practice CS report does not include composed text.
Invoice Recap Report	Invoice Journal report with invoice detail included	In Practice CS, filter by invoice number.
Billing Summary	Work-In-Process Summary, group by client, detail by activity type	

† Denotes a report that can be imported from the Practice CS Library portlet

Staff Management reports

CSP	Practice CS	Comment
Staff Analysis by Client – Engagement by Service	Billing Analysis with detail line activity and grouped by staff, client, engagement	
Staff Benefit Hours	Staff Benefits Summary	
Staff Budget	Staff Target Summary	
Staff Profit Report	Profit Report detailed by staff †	
Staff Rate Analysis	Billing Analysis detailed by staff	
Staff Time and Expense Journal	Time and Expense Journal Time and Expense Listing – grouped by staff	
Staff Time Detail	Production Analysis detailed by activity, grouped by staff, activity type, and activity class	

CSP	Practice CS	Comment
Staff Time Summary	Production Analysis detailed by staff	
Overtime – Comp Time Summary	No equivalent	Comp time can be viewed on the Staff Benefit Summary report.
Timesheet Exception	Timesheet Exception	

† Denotes a report that can be imported from the Practice CS Library portlet

Firm Management reports

CSP	Practice CS	Comment
A/R Summary	Accounts Receivable Summary	
Billing Analysis	Billing Analysis	
Firm Reconciliation	Period Reconciliation	
General Ledger Tie-In	Work-in-Process Summary detailed by engagement GL account or activity GL account	To produce the report in Practice CS, choose File / Export / Journal Entries to Creative Solutions Accounting, right-click, and choose Print Grid from the context menu.
Performance Report	Work-in-Process Summary Production Analysis Billing Analysis	
Profit Report	Profit Report †	
Receipt/Adjustment Journal	Receipt & Adjustment Journal	The Practice CS report includes applied and open amount in addition to the information from the CSP report.
Time Analysis	Production Analysis	
Timesheet Listing	Time and Expense Journal Time and Expense Listing	The CSP report allows selection of type of transaction (BT, BX, etc.). In Practice CS, you can use filters to accomplish the same result.

† Denotes a report that can be imported from the Practice CS Library portlet

Scheduling Solution reports

CSP	Practice CS	Comment
Budget vs. Actual by Task	Task Budget to Actual	
Detail Tickler List	Project Listing	To duplicate the CSP report in Practice CS, group the report by client and mark the *Include Task Detail* checkbox.
Events	List of Project Templates	
Routing Sheet	Routing Sheet Routing Sheet Alternate 1 †	The CSP report allows for custom routing text. The Practice CS report does not have this option.
Schedule Overview	Task Tracking Project Listing Project Tracking Schedule Item Listing	
Staff Budgeted Hours by Day	No equivalent	Practice CS does not currently have a work calendar.
Staff Calendar	No equivalent	Practice CS does not currently have a work calendar.
Staff Hours Variance	Staff Schedule Summary	
Staff Schedule	Task Tracking	To duplicate the CSP report in Practice CS, group the Task Tracking report by Staff.
Tickler Budget vs. Actual	Project Budget to Actual	
Tickler Status	Project Tracking	
Tickler Tracking	Project Listing with *Include Task Detail* checkbox marked	
Track Overview	Project Tracking Project Listing	
Tickler Report	Project Tracking grouped by event.	To access this report in CSP, choose a client in the Client master file and click the Ticklers button.

† Denotes a report that can be imported from the Practice CS Library portlet

Practice CS reports not in CSP

Lists: Activity Categories, Departments, Engagement Categories, Entities, Staff Levels

Billing: Billed Tax Summary

Collection: Collection Summary, Invoice Receipts Analysis, Service Charge Journal

Reconciliation: Client Investment Analysis