|  |
| --- |
| **View or Stored Procedure Name (Pracctice use only)** |
| |  |  |  | | --- | --- | --- | | **Name** | **View** | **Stored Procedure** | |  |  |  | |  |  |  | |

|  |  |  |
| --- | --- | --- |
| **Company Name** | **Contact Name** | **Date Submitted** |
|  |  |  |
| **Report Name?:**  *Please give a meaningful name to this report – this will be used for the view name* | | |
|  | | |
| **Based on existing Osprey report?:**  *Please note where the report is available from if so* | | |
|  | | |
| **What is the purpose of this report?:**  *Please give a general explanation of what you would like to achieve with this report* | | |
|  | | |
| **Filters required:**  *When you run the report, do you want to be able to run it just for a range of dates/fee earners/worktypes etc.? Filtered reports can also be run without filling filter boxes in.* ***N.B. Please note that reports which are to be scheduled cannot have runtime filters on them, although we can set the data view to only look at data for the last X amount of time, or for certain fee earners / work types etc..*** | | |
|  | | |
| **Data fields to display on the report:**  *Please list here ALL fields you want to display on your report, and where they are found in Osprey. For example, Client no, Matter no, Posting date of bill, dossier field Source of Introduction from dossier page Prospects – if possible* ***please note the dossier page and field ID*** *names required. Please feel free to submit this in a Word or Excel document if you find it easier* | | |
|  | | |
| **Any Exclusions?:**  *Do you want to exclude any data here, e.g. Live Matters only, Prospect matters only, Conveyancing worktypes only, Data for current month only* | | |
|  | | |
| **Schedulable?:**  *Do you want to be able to schedule this report to email to staff? Please provide details if so* | | |
|  | | |