

## Osprey Approach: Add Report Types for your custom reports

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The latest version is always online at https://support.ospreyapproach.com/?p=53536

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You can add Report Types to store your own custom reports. Any custom reports you have created or we have imported/created for you will sit under Reports > Reports (New) in the browser. The Report Types are sub folders under this menu:

仚	Reports Reports (New)			
ନ୍ଧ୍ୟ	Report Type •     Label             Beport Type: Time Reports			
٩	<ul> <li>         B Report Type: Supervisor          B Report Type: Scheduling Reports      </li> </ul>			
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To add a new Report Type, follow the steps below.

• Navigate to Supervisor > Report Setup > Report Type

	SUPERVISOR	
G	Code Setup	
Ê	System Setup	
ŧ۵	Financial Setup	
	Case Management Setup	its
<b>0-0</b>	с .	its Summary
	User Design	andard Fee Checker
		licates
¥ <del>,</del>	Report Setup	Report Type
\$7	Tools & Utilities	Solicitors PI Insurance Renewal Form
-0	Financial Periods	proved Erasure Requests - Filterable
_		proved Data Requests - Filterable
- <b>\$</b>	CRM-AF1 Additional Rates	nding Data Requests - Filterable
		nding Erasure Requests - Filterable
Ē	CRM Auto Posting Defaults	
а́ш́	Reprint CRM611 Spreadsheet	
11111	Include Documents	
		ments & WIP
(QL)	Portal Setup	Summary
- <b>N</b> E		akdown Numbered Table

• The current list of Report Types is shown. Click New to add a new Report Type:

Supervisor Report Setup Report Type	
New Export	
NAME	DESCRIPTION
Reports Library	

• Add a Name (required) and a Description (optional) for the Report Type:

Report Type		×
Name:		
Description:		•
		-
Save	Cancel	

When creating a new report (or saving an existing report), you can now use the Report Type drop down to select your newly created Report Type.

Save Report		$\times$
Type:	Reports Library	•
Name:	FeesReceivedByTimeFeeEarner	
Label:	Accounts - Fees Received By Time Fee Earner	
Description:	Based on Percentage Recovery report, apportions receipts according to the fee earner time recording, or the matter fee earner if there is no time ticked against the bill.	*
	Save Close	