



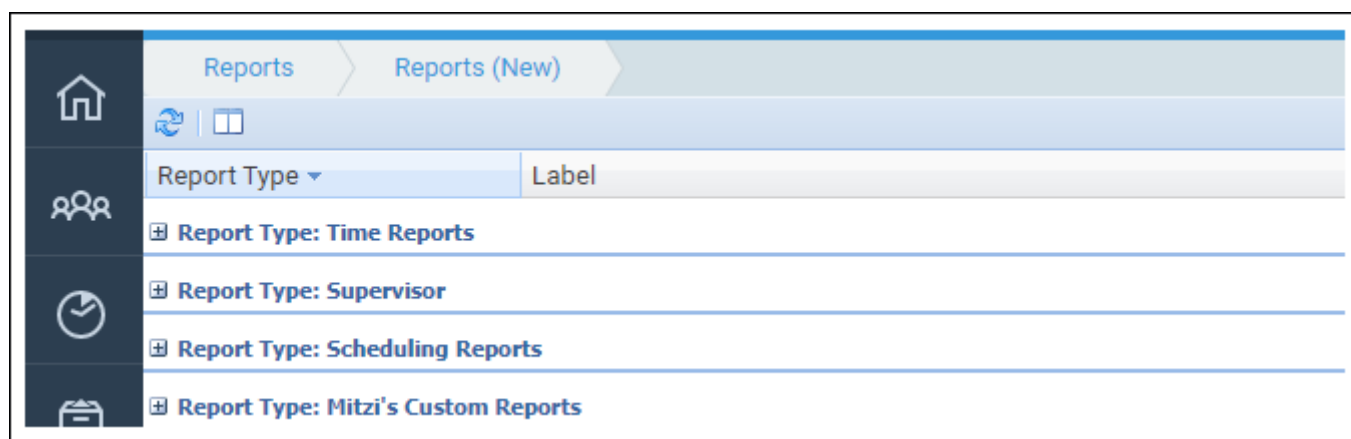
Osprey Approach: Add Report Types for your custom reports

This help guide was last updated on
Apr 16th, 2024

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

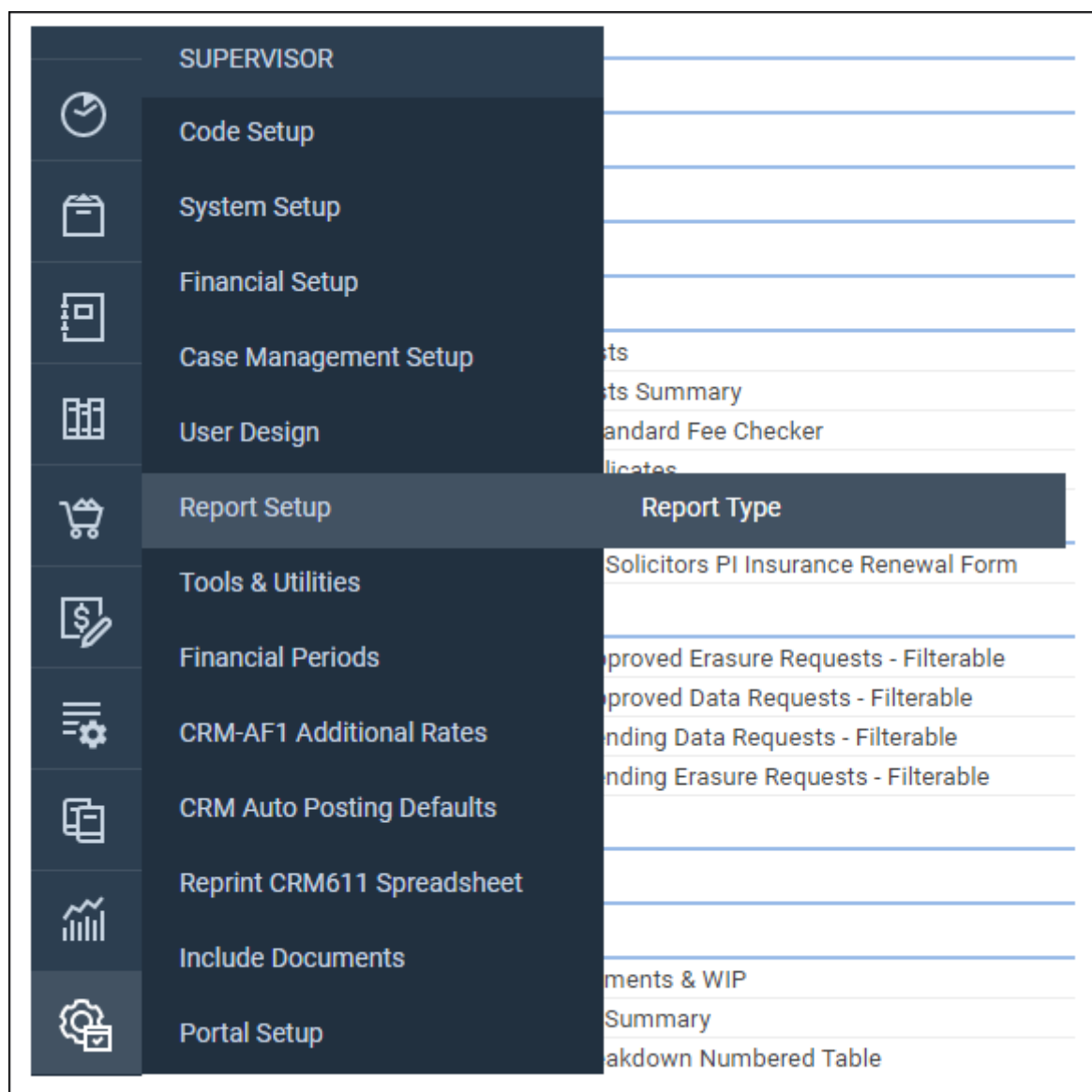


You can add Report Types to store your own custom reports. Any custom reports you have created or we have imported/created for you will sit under Reports > Reports (New) in the browser. The Report Types are sub folders under this menu:



To add a new Report Type, follow the steps below.

- Navigate to Supervisor > Report Setup > Report Type



- 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

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