



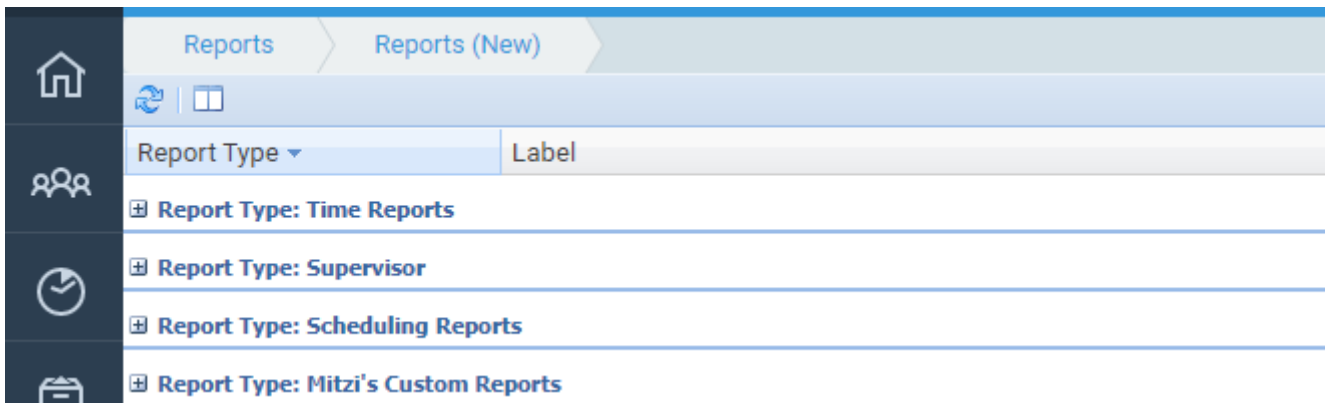
Osprey Approach: Add Report Types for your custom reports

This help guide was last updated on
Apr 13th, 2023

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

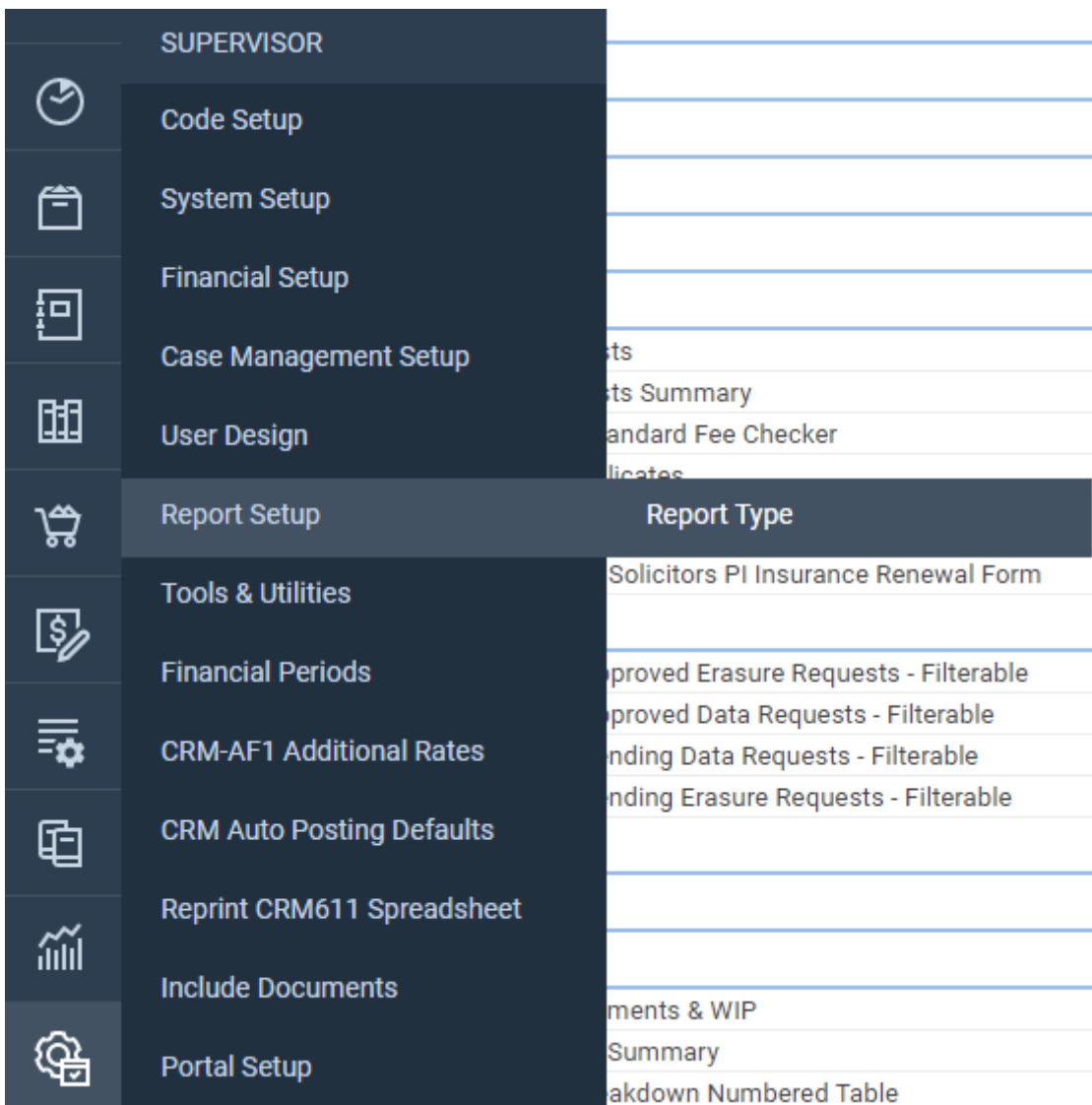


You can add Report Types to store your own custom reports. Any custom reports you have created or we have imported/created for you will sit under Reports > Reports (New) in the browser. The Report Types sit under this menu:



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

- Navigate to Supervisor > Report Setup > Report Type

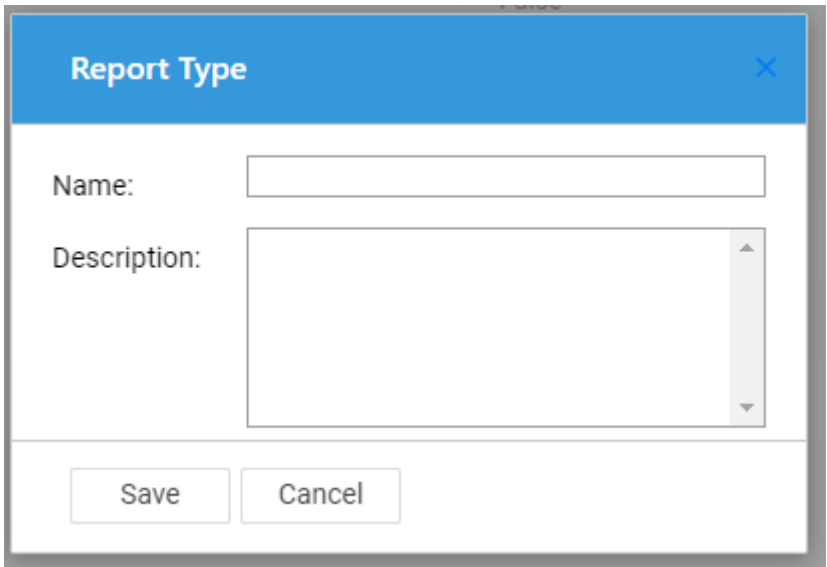


- The current list of Report Types is shown. Click New to add a new Report Type:

New Export Refresh

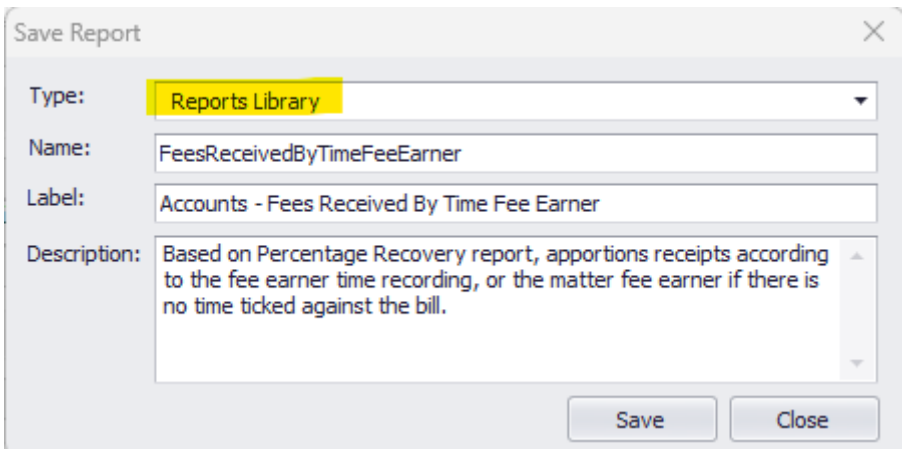
| NAME | DESCRIPTION |
|-----------------|-------------|
| Reports Library | |

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



A dialog box titled "Report Type" with a close button (X) in the top right corner. It contains two input fields: "Name:" with a text box and "Description:" with a larger text area. At the bottom, there are two buttons: "Save" and "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.



A dialog box titled "Save Report" with a close button (X) in the top right corner. It contains four input fields: "Type:" with a dropdown menu showing "Reports Library" (highlighted in yellow), "Name:" with a text box containing "FeesReceivedByTimeFeeEarner", "Label:" with a text box containing "Accounts - Fees Received By Time Fee Earner", and "Description:" with a text area containing "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." At the bottom, there are two buttons: "Save" and "Close".