Osprey Approach: Reports: Archived Matters by User

Osprey
Approach™

This guide will go through the Archived Matters by User report

This generates a report on matters archived according to the filters and groupings you select. By default no options are selected, which means that the output provided will show ALL archived matters and the user who archived them.

Filter options

- **Fee Earner** – Tick this box if you want to show only one or a selection of fee earners. Once the box is ticked all fee earners marked as In Use will appear. You can then tick each one that you want to report on. If you want to see all fee earners, do not tick the fee earner box and it will produce all fee

earners.

- **Work Type** - Tick this box if you want to show only one or a selection of work types. Once the box is ticked all work types marked as In Use will appear. You can then tick each one that you want to report on. If you want to see all work types, do not tick the work types box and it will produce all work types.
- **Executive** - Tick this box if you want to show only one or a selection of matter Executives (Supervising Fee Earners). Once the box is ticked all Executives marked as In Use will appear. You can then tick each one that you want to report on. If you want to see all Executives, do not tick the Executive box and it will produce all Executives.
- **User** - Tick this box if you want to show only one or a selection of Users. Once the box is ticked all Users not marked as Inactive will appear. You can then tick each one that you want to report on. If you want to see all Users, do not tick the User box and it will produce all Users
- **Franchise** - Tick this box if you want to show only one or a selection of Franchises. Once the box is ticked all Franchises marked as In Use will appear. You can then tick each one that you want to report on. If you want to see all Franchises, do not tick the Franchise box and it will produce all Franchises.
- **Private or LA** – If left on All, this will show both Private and Legal Aid clients matters. You can choose to show only Private or Legal Aid clients by selecting the appropriate option.
- **Date Filters** – If left blank, this will show all archived matters, you can choose to show only those archived matters between particular dates by populating both the From and To date boxes.

Grouping options

- **No Grouping** – shows a listing with the filters selected
- **Fee Earner** – shows a listing with the filters selected and additionally groups matters for Fee Earners together
- **Work Type** - shows a listing with the filters selected and additionally groups matters for Work Types together
- **Executive Code** - shows a listing with the filters selected and additionally groups matters for Executive Codes (Supervising Fee Earners) together
- **Franchise Category** - shows a listing with the filters selected and additionally groups matters for Franchise Categories together
- **Remuneration Type** - shows a listing with the filters selected and additionally groups matters for Remuneration Types together

List of columns produced

- Client/Matter
- Branch
- Dept
- Client Name
- Matter Description
- F/E
- W/T
- P/L
- Remuneration

- Franchise
- Opened
- Archived
- User
- Reference
- Location