



Osprey Approach: Reports: Archived Matters

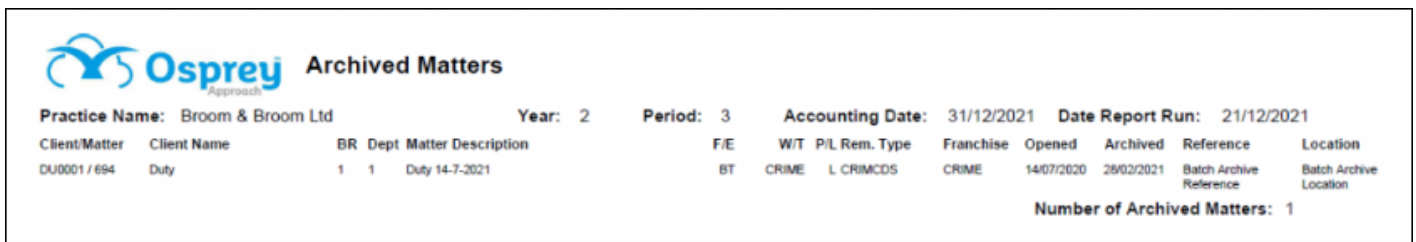
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The latest version is always online at
<https://support.ospreyapproach.com/?p=32782>



This guide will go through the Archived Matters report

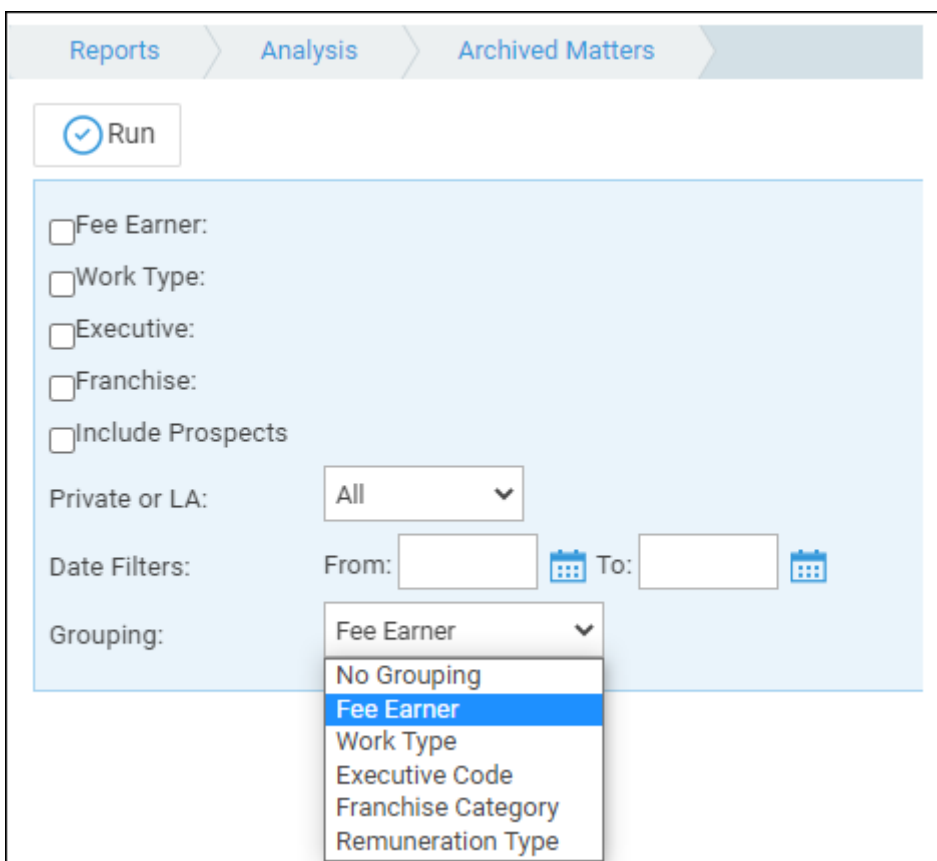
This generates a report on matters archived according to the filters and groupings you select. By default no options are selected, which means that the output provided will show ALL archived matters.



The screenshot shows the 'Osprey Archived Matters' report header and a table. The header includes the Osprey logo, 'Archived Matters', 'Practice Name: Broom & Broom Ltd', 'Year: 2', 'Period: 3', 'Accounting Date: 31/12/2021', and 'Date Report Run: 21/12/2021'. Below this is a table with columns: Client/Matter, Client Name, BR, Dept, Matter Description, F/E, W/T, P/L, Rem. Type, Franchise, Opened, Archived, Reference, and Location. A single row of data is visible: DU0001 / 694, Duty, 1, 1, Duty 14-7-2021, BT, CRIME, L, CRIMCDS, CRIME, 14/07/2020, 28/02/2021, Batch Archive Reference, and Batch Archive Location. At the bottom right, it states 'Number of Archived Matters: 1'.

Client/Matter	Client Name	BR	Dept	Matter Description	F/E	W/T	P/L	Rem. Type	Franchise	Opened	Archived	Reference	Location
DU0001 / 694	Duty	1	1	Duty 14-7-2021	BT	CRIME	L	CRIMCDS	CRIME	14/07/2020	28/02/2021	Batch Archive Reference	Batch Archive Location

Filter options



The screenshot shows the 'Archived Matters' filter options interface. It includes a 'Run' button with a checkmark, several unchecked checkboxes for 'Fee Earner', 'Work Type', 'Executive', 'Franchise', and 'Include Prospects'. There is a dropdown menu for 'Private or LA:' set to 'All'. 'Date Filters' are shown with 'From:' and 'To:' fields, each with a calendar icon. The 'Grouping:' dropdown menu is open, showing options: 'Fee Earner', 'No Grouping', 'Fee Earner' (highlighted), 'Work Type', 'Executive Code', 'Franchise Category', and 'Remuneration Type'.

- **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.
- **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.
- **Include Prospects** - If left blank, this will show all non-archived matters, you can choose to show only those non-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
- Client Name
- Branch
- Dept
- Matter Description
- F/E
- W/T
- P/L
- Remuneration
- Franchise
- Opened
- Archived
- Reference
- Location