Osprey Approach: Reports: Key Dates Report

This help guide was last updated on Jul 25th, 2022

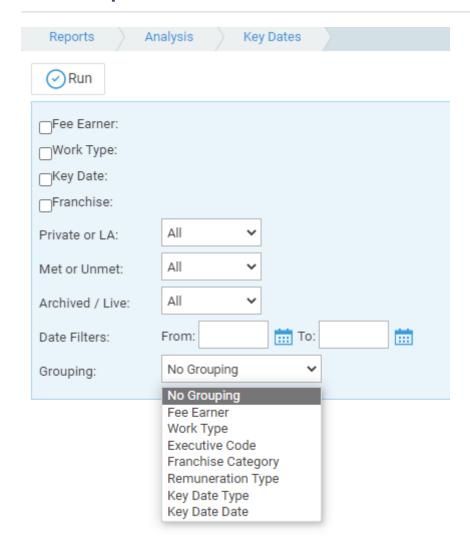
The latest version is always online at https://support.ospreyapproach.com/?p=32792



This report lists the Key Dates that have been set according to the filters and groupings selected, by default the report shows *ALL key* dates whether they are completed or not, sorted in client number, then date order.



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.
- **Key Date** Tick this box if you want to show only one or a selection of Key Dates. Once the box is ticked all key dates marked as In Use will appear. You can then tick each one that you want to

report on. If you want to see all key dates, do not tick the Key Date box and it will produce all key dates.

- 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.
- **Met or Unmet** If left on All, this will show both Met and Unmet key dates. You can choose to show only Met or Unmet by selecting the appropriate option.
- Archived / Live If left on All, this will show both Archived and Live clients matters. You can choose to show only Archived or Live clients by selecting the appropriate option.
- **Date Filters** If left blank, this will show all matters, you can choose to show only those matters between particular dates by populating both the From and To date boxes.

Grouping Options

- No Grouping orders in Client/Matter number order, followed by date.
- 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 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.
- **Key Date Type** shows a listing with the filters selected and additionally groups matters for Key Date Types together.
- **Key Date Date** shows a listing with the filters selected and additionally groups matters for Key Date Dates together.

List of Columns Produced

- Client/Matter
- Client Name
- F/E
- W/T
- Matter Description
- Key Date ID
- Key Date
- Notes
- Completed