

Osprey Approach: Reports: Live Matters

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This guide will take you through the Live Matters report

This report outputs non-archived matters according to the filters and groupings you select. By default no options are selected, which means that the output provided will show ALL non-archived matters ordered by Client Name.



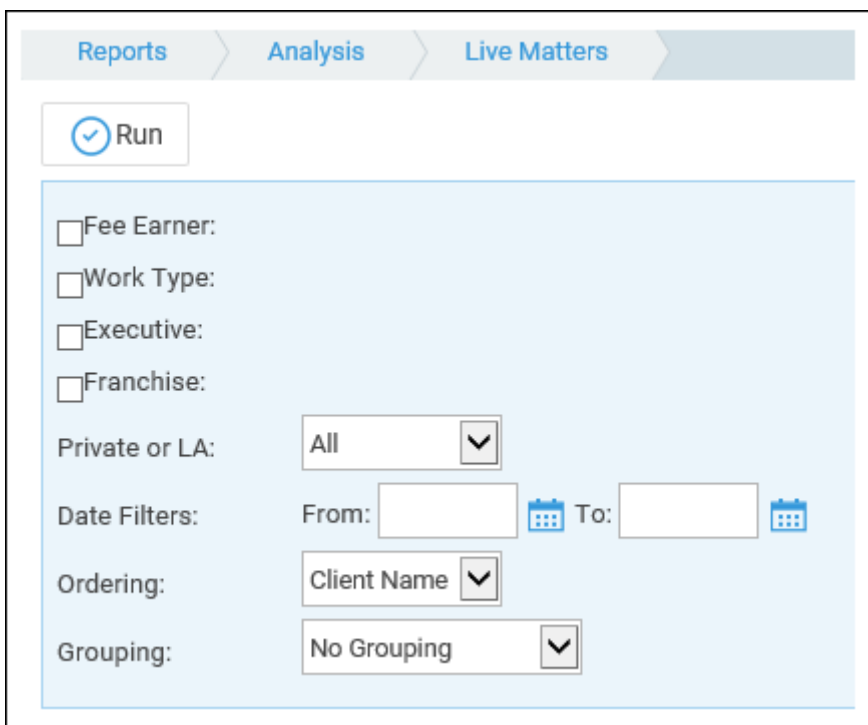
Practice Name: Broom & Broom Ltd **Date Report Run:** 17/11/2021

Client/Matter	Client Name	Br	Dept	Matter Description	F/E	W/T	P/L	Franchise	Remuneration	Opened	Exec
L00001/1	Lynch Stanley	1	1	Litigation	TP	LIT	P		STANDARD	12/10/2019	
ME0001/1	Meek Beverley	1	1	Non-molestation	MAB	FWINJA	L	CIV	FPRCPHCA	10/02/2020	
N00001/1	Nakamura Hiro	2	1	Purchase of Kenso Cottage, Chinatown	MAB	CONVEY	P		STANDARD	12/10/2019	
N00001/2	Nakamura Hiro	1	1	Sale of 22 Acacia Avenue	BT	CONVEY	P		STANDARD	04/10/2019	
S00001/1	Saunders Niki	2	1	ABH	MAB	CRIME	L	CRI	CRIMRMC	02/10/2019	
SH00000001/1	Shellstrop Eleanor	2	1	Personal injury claim	BT	FWINJA	P		STANDARD	08/07/2020	
SM0001/1	Smith Joanne	2	1	Non-molestation order	MAB	FWINJA	P		STANDARD	21/11/2019	
SO0001/1	Sokolov Johanna	1	1	Non-molestation	MAB	FWINJA	L	CIV	FPRCPHCA	10/02/2020	
S00002/1	Sylar Edward	1	1	Criminal Damage	BT	CRIME	L	CRIME	CRIMRMC	03/10/2019	TP
TA00000001/1	Taylor Roger	2	1	Default Matter	33	GLOBAL	P		STANDARD	29/06/2020	
TE0001/1	Test Jan	2	1	Testing LAA Bills	MAB	CONVEY	P		STANDARD	22/03/2020	
TH0001/1	Thompson Delilah	2	1	Purchase of 24 Park Lane, W1 1AA	MAB	TK_RCP	P		STANDARD	05/11/2019	
TH0001/4	Thompson Delilah	1	1	INVB - Police station advice	MAB	CONVEY	L	CRI	CRIMAAP	27/09/2020	
TH0001/5	Thompson Delilah	1	1	Will	MAB	WILLS	P		FIXEDFEE	27/09/2020	
TH0001/7	Thompson Delilah	1	1	PRospect 2	BT	CONVEY	P		FIXEDFEE	27/09/2020	
WO00000001/1	Wood Rich	1	1	Testing autofile matter	BT	CONVEY	P		STANDARD	11/06/2020	
WO00000001/2	Wood Rich	1	1	Legal Aid CRM7	BT	CRIME	L	CRI	CRIMRMC	21/06/2020	

Number of Live Matters: 69

Live Matters example

Filter Options



The screenshot shows the 'Live Matters' filter options interface. At the top, there are three tabs: 'Reports', 'Analysis', and 'Live Matters', with 'Live Matters' being the active tab. Below the tabs, there is a 'Run' button with a checkmark icon. The main filter area contains several options:

- Fee Earner:
- Work Type:
- Executive:
- Franchise:
- Private or LA: All (dropdown menu)
- Date Filters: From: [] [calendar icon] To: [] [calendar icon]
- Ordering: Client Name (dropdown menu)
- Grouping: No Grouping (dropdown menu)

- **Fee Earner** – Tick this box if you want to show only one or a selection of fee earners. Once 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 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 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 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/Legal Aid** – 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 live matters, you can choose to show only those live matters between particular dates by populating both the From and To date boxes.

Grouping and Ordering

Ordering - It is possible to show the output of this report in two different orders, Client Name or Client No.

Grouping - choose between:

- 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 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
- Department
- Matter Description
- F/E
- W/T
- P/L
- Franchise

- Remuneration
- Opened
- Exec