



# Osprey Approach: Completed Matters By User

This help guide was last updated on  
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The latest version is always online at  
<https://support.ospreyapproach.com/?p=32796>



# This guide will go through the Completed Matters by User report

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Reports matters completed by particular users. For a matter to be flagged as completed, the last task of the workflow must be run. This in turn will fill the Date Completed in the matter details.

## **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.

**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.

**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

**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 completed matters, you can choose to show only those completed 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

Franchise Category - shows a listing with the filters selected and additionally groups matters for Franchise Categories together

Private Or LA - shows a listing with the filters selected and additionally groups matters for Private Or Legal Aid together

## **List of columns produced**

Client/Matter

Branch

Dept

F/E

W/T

Matter Description

Remuneration

P/L

Franchise

Opened

Completed

User

Client Name