



# Osprey Approach: Reports: New Matters By User

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The latest version is always online at  
<https://support.ospreyapproach.com/?p=32800>



This report lists matters opened between any two given dates created by particular users, whether they have subsequently been archived or not.



## New Matters by User

Practice Name: Broom & Broom Ltd

Date Report Run: 07/12/2021

Client/Matter	Client Name	Br	Dept	Matter Description	F/E	W/T P/L	Franchise	Remuneration	Opened	Archived	User
LI00000001/7	Lister	1	1	LPA	MAB	LPA P		FIXEDFEE	17/05/2020		supervisor
LI00000001/8	Lister	1	1	Litigation	MAB	LIT P		FIXEDFEE	17/05/2020		supervisor
LI00000001/9	Lister	1	1	Purchase - NB	TP	NB P		FIXEDFEE	17/05/2020		supervisor
LI00000001/10	Lister	1	1	Part Ex	MAB	PEX P		FIXEDFEE	17/05/2020		supervisor
LI00000001/11	Lister	1	1	Probate	MAB	PROB P		FIXEDFEE	17/05/2020		supervisor
LI00000001/12	Lister	1	1	Remort	MAB	REM P		FIXEDFEE	17/05/2020		supervisor

New Matters by User example

## Filter Options

Reports
Analysis
New Matters By User

☒ Run

☐ Fee Earner:  
☐ Work Type:  
☐ Franchise:  
☐ User:  
Private or LA:   
Date Filters: From:  To:   

You must enter filter dates on this report

Grouping:

### Filter Options

- **Fee Earner** - Tick this box if you want to show only one or a selection of fee earners, or leave blank for all.
- **Work Type** - Tick this box if you want to show only one or a selection of work types, or leave blank for all.
- **Franchise** - Tick this box if you want to show only one or a selection of Franchises, or leave blank for all.
- **User** - Tick this box if you want to show only one or a selection of Users, or leave blank for all.
- **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 new matters, you can choose to show only those new matters opened between particular dates by populating both the From and To date boxes.

## Grouping Options

- **No Grouping** – report appears in client/matter order.
- **Fee Earner** – report groups matters for Fee Earners together with a count of matters at the end of each fee earner.
- **Work Type** - report groups matters for Work Types together with a count of matters per work type.
- **Franchise Category** - report groups matters for Franchise Categories together with a count of matters per franchise.
- **Private Or LA** - report groups matters for Private Or Legal Aid together.

## List of Columns produced

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- Client/Matter
- Client Name
- Branch
- Department
- Matter Description
- F/E
- W/T
- P/L
- Franchise
- Remuneration
- Opened
- Archived
- User