Osprey Approach: Reports: New Matters

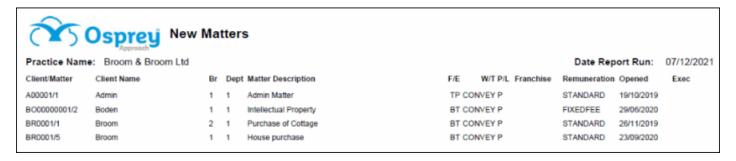
This help guide was last updated on May 30th, 2024

The latest version is always online at https://support.ospreyapproach.com/?p=32798

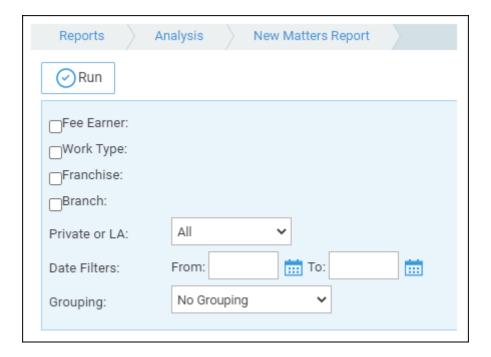


This guide will go through the New Matters report

This generates a report on matters opened between any two given dates, whether they have been subsequently archived or not.



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
- Branch Tick this box if you want to show only one or a selection of Branches, 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 between particular dates by populating both the From and To date boxes.

Grouping Options

- No Grouping report is sorted by client no and matter no
- Fee Earner report groups matters for Fee Earners together with a count of matters per 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 with a count of matters per P/L status

List of Columns produced

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