



# Osprey Approach: Reports: New Matters

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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.

Osprey <small>Approach</small> New Matters		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	Exec			
A00001/1	Admin	1	1	Admin Matter	TP	CONVEY	P	STANDARD	19/10/2019				
BC00000001/2	Boden	1	1	Intellectual Property	BT	CONVEY	P	FIXEDFEE	29/06/2020				
BR0001/1	Broom	2	1	Purchase of Cottage	BT	CONVEY	P	STANDARD	26/11/2019				
BR0001/5	Broom	1	1	House purchase	BT	CONVEY	P	STANDARD	23/09/2020				

## Filter Options

Reports > Analysis > New Matters Report

Run

Fee Earner:

Work Type:

Franchise:

Branch:

Private or LA:

Date Filters: From:

Grouping:

- **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