Osprey Approach: Reports: Review Periods Report

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The latest version is always online at
https://support.ospreyapproach.com/?p=32802

Osprey™ Approach

The purpose of this report is to show those matters which either have a review period or review date set. Review dates and review periods are *not* linked, they are treated as two separate functions. Review dates (the initial date, and the type qualifier) are treated as simple reminders, *the Review Date must be updated manually*, whereas review periods ensure that movement is made on a matter within a certain period. By default this report will show *ALL* matters with either a review period or date set grouped by Fee Earner.

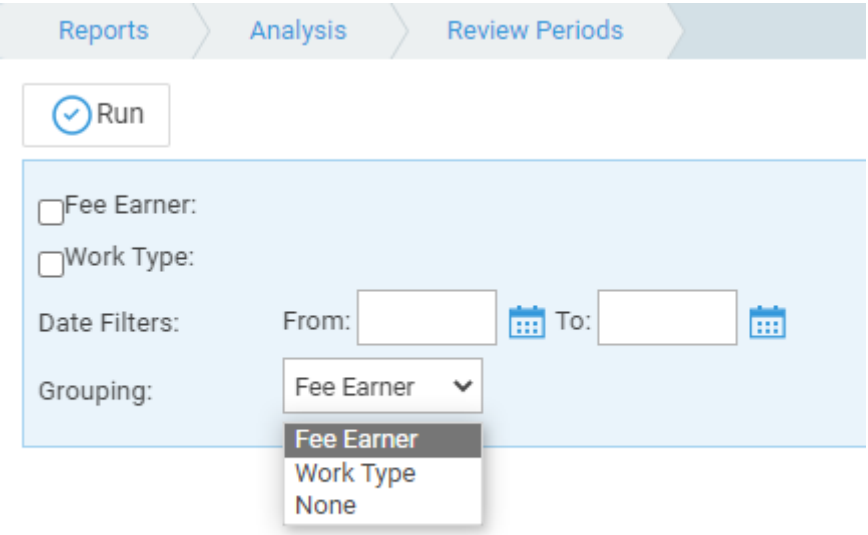
Review Periods

Practice Name: Broom & Broom Ltd **Date Report Run:** 18/07/2022

FEE EARNER **MAB**

Client / Matter	Client Name	Matter Description	FE	WT	Date	Period	Type	Matter LMD
LI00000001 / 13	Lister Dave T	Res Pur	MAB	TK_RCP	17/05/2021	90		17/05/2021 02:00:00
LI00000001 / 14	Lister Dave T	Res Sale	MAB	TK_RCS	22/06/2022	0		17/05/2021 02:00:00
LI00000001 / 15	Lister Dave T	T of E	MAB	TRAN	22/05/2022	0	M	17/05/2021 02:00:00
LI00000001 / 16	Lister Dave T	Will	MAB	WILLS	21/06/2022	0		17/05/2021 02:00:00
LI00000001 / 17	Lister Dave T	Purchase of business	MAB	CONVEY	22/05/2021	0	M	08/06/2021 00:00:00
BR0001 / 10	O'Broom Lilian LA	House sale	MAB	FAMILY	30/03/2022	90		30/03/2022 14:14:31

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.
- **Date Filters** – This should be completed for the period in question. If left blank, this will show all matters, you can choose to show only those matters between particular dates by populating both the From and To date boxes.

Grouping Options

- **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
- **None** – shows a listing with the filters selected

List of Columns Produced

- Client/Matter
- Client Name
- Matter Description
- F/E
- W/T
- Date
- Period
- Type
- Matter LMD