



Osprey Approach: Understanding KPI Chart Results

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The latest version is always online at
<https://support.ospreyapproach.com/?p=2482>

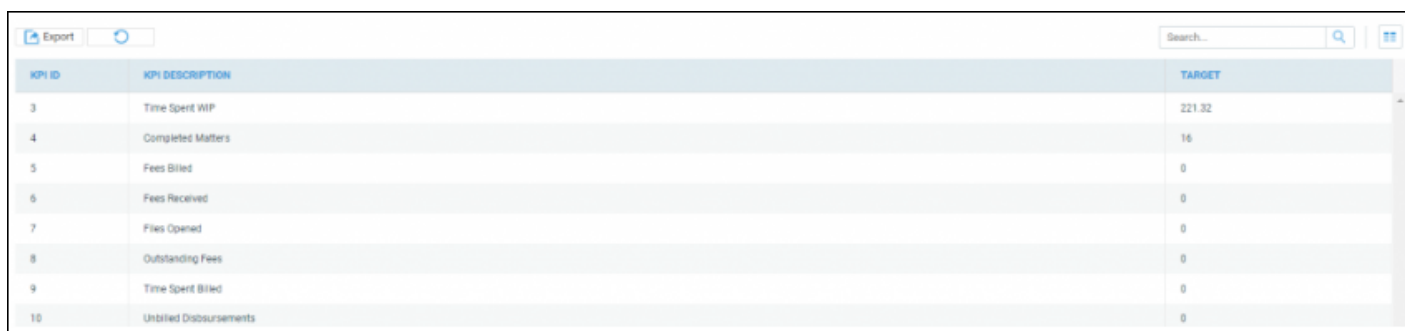


This guide will assist you with understanding the results of your KPI charts

You can set up KPI charts to show:

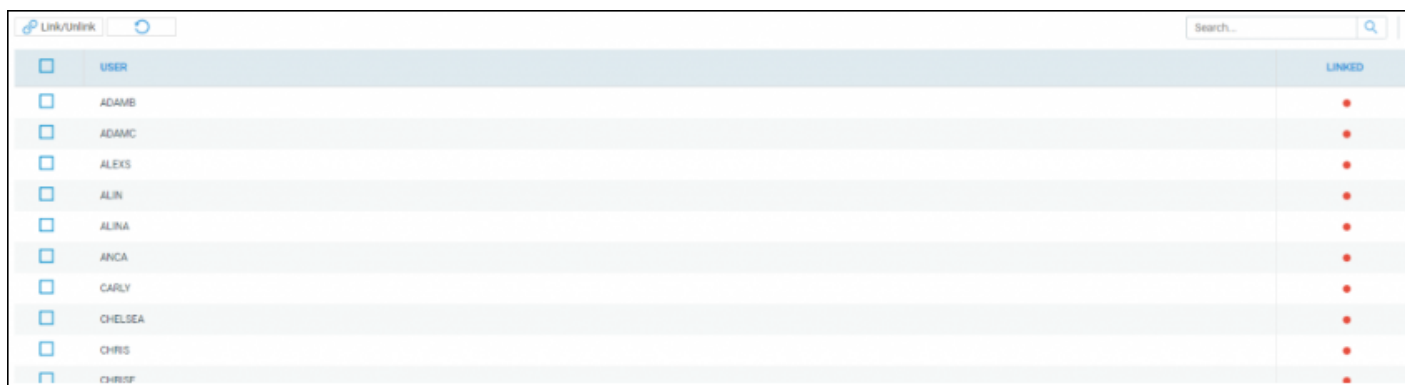
- Completed Matters
- Time Spent Billed
- Files Opened
- Time Spent WIP
- Fees Billed
- Outstanding Fees
- Fees Received

First you will need to link the reports you want to see to the users who will need to be able to see them. Select the 'Supervisor' tab and now go to 'Case Management Setup' and then select the option for 'KPI Details'.



KPI ID	KPI DESCRIPTION	TARGET
3	Time Spent WIP	221.32
4	Completed Matters	16
5	Fees Billed	0
6	Fees Received	0
7	Files Opened	0
8	Outstanding Fees	0
9	Time Spent Billed	0
10	Unbilled Disbursements	0

When you right click each KPI report, you will have a 'Link Users' option.

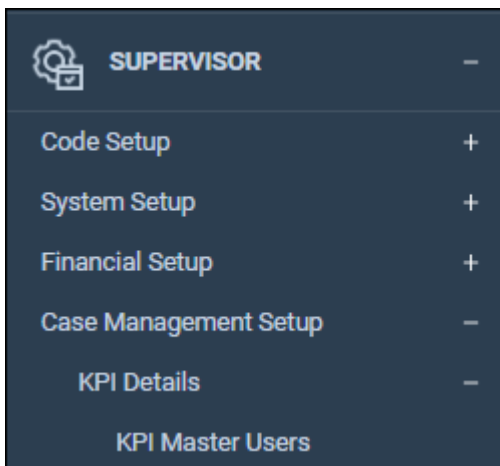


USER	LINKED
<input type="checkbox"/> ADAMB	•
<input type="checkbox"/> ADAMC	•
<input type="checkbox"/> ALEXS	•
<input type="checkbox"/> ALIN	•
<input type="checkbox"/> ALINA	•
<input type="checkbox"/> ANCA	•
<input type="checkbox"/> CARLY	•
<input type="checkbox"/> CHELSEA	•
<input type="checkbox"/> CHRIS	•
<input type="checkbox"/> CHRISP	•

Tick the box alongside each Osprey user who you wish to have access to this KPI, then click the 'Link/Unlink' button at the top of the screen.

You will now need to link to each user the fee earners whose KPIs they are permitted to see.

Under the 'KPI Details' area of the 'Case Management Setup' options, select 'KPI Master Users'.



Right clicking on each user will give you the option to 'Link Fee Earner'

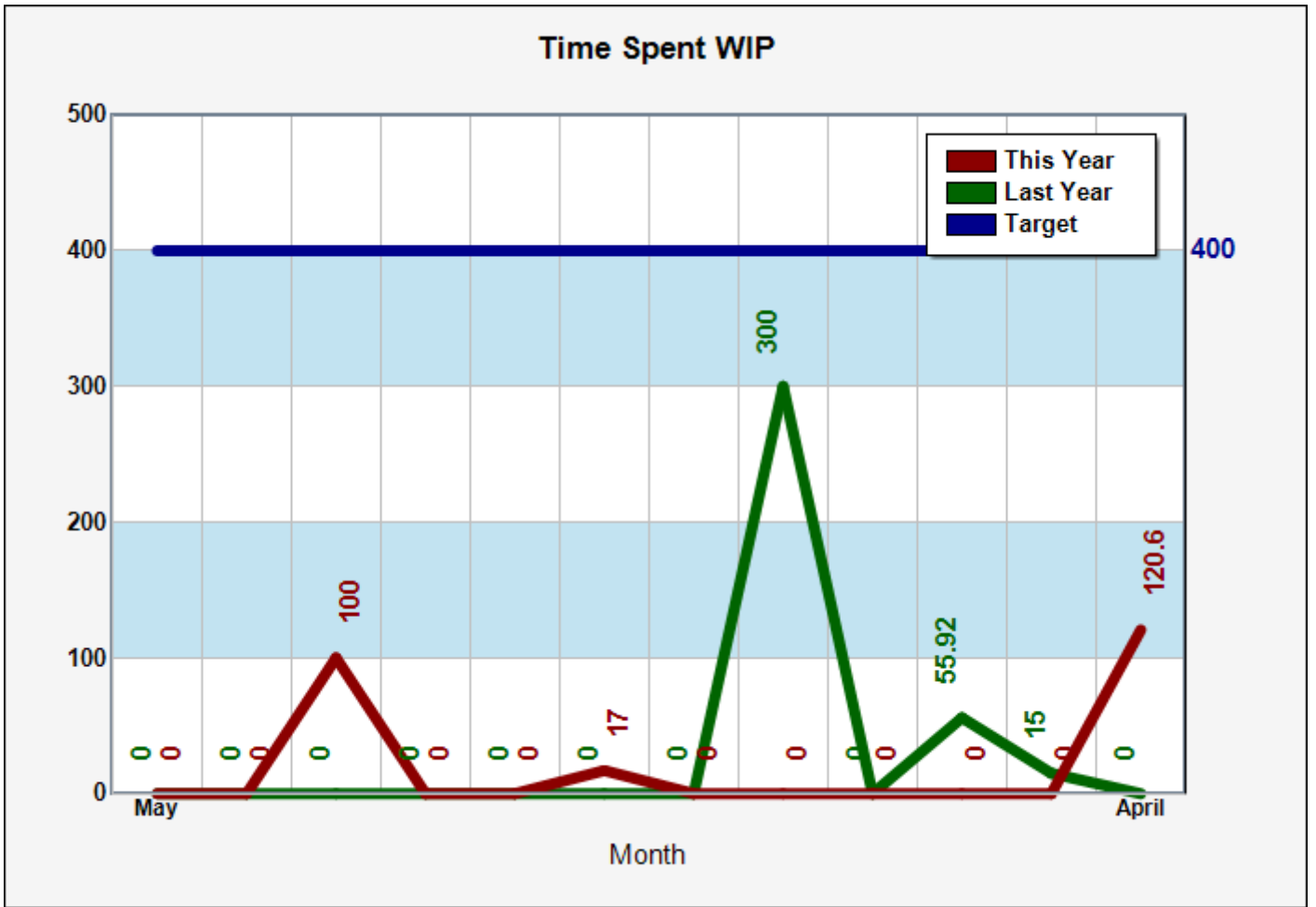


From the list of available fee earners, select the fee earners whom this user is allowed to view KPIs for, then click the 'Link/Unlink' button at the top of the screen.

You may also wish to add targets for the KPIs so that you can compare target and actual figures. To do this, under the 'KPI Details' area, click the 'edit' button that appears when you right click each KPI that you wish to set a target for. Enter the target figure and click 'Save'.

A light gray dialog box for setting KPI targets. At the top are two buttons: 'Save' with a floppy disk icon and 'Cancel' with a blue circle and 'x' icon. Below these is a horizontal line. Under the line, the text 'KPI Description:' is followed by 'Completed Matters'. Below that, the text 'Target:' is followed by a text input field containing the number '16'.

Now, navigate to the Osprey Home page. You should now see some results in the KPI section at the top of the screen.



Choose the KPI you wish to view, then the individual fee earner.

If you wish, you can also click the 'Multi Select' button to and tick several fee earners – this will allow you to see totals for all fee earners selected.

You can choose between a line or a bar graph, and there is also an option at the top of the screen to print the results.

Please note that the 'Set As Default' button only relates to the available KPI chosen, and not any fee earner selections you have made.

Set default | Refresh chart | Print

Available KPIs:

Time Spent WIP

Fee Earner:

Tom Philpotts

Multi Select

Chart Type:

☒ Line ☐ Bar

Show Labels:

☒

Target:

221.32

The below information should assist you in understanding where the KPI results come from.

Chart Name	Information
Completed Matters	Can be compared to the Completed Matters report in Reports > Analysis. It uses the Date Completed field in the matter details page (this is filled on completion of a workflow).
Time Spent Billed	Can be compared to the Time Spent report in Reports > Time. Uses the total of Billed Time only.
Files Opened	Can be compared to the New Matters report in Reports > Analysis.
Time Spent WIP	Can be compared to the Time Spent report in Reports > Time. Uses the total of Unbilled Time only.
Fees Billed	Can be compared to the Bills Rendered report in Reports > Client Financial. The Costs Ex. figure is used.
Outstanding Fees	Can be compared to the Unpaid Bills report in Reports > Client Financial. The Amount Due figure is used.
Fees Received	Can be compared to the Bills Paid by Fee Earner report in Reports > Client Financial with the Report Type set to Paid Bills.