

Osprey Approach: Work In Progress

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The latest version is always online at
<https://support.ospreyapproach.com/?p=33163>

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This report shows a breakdown of all WIP (Unbilled time which shows on the time ledger) on the system in client number order. It attributes the time to the Matter Fee Earner.

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.

Branch – Choose from ALL branches or select a specific branch to report on.

Currency – Choose which currency you wish to report on.

Less Than – Enter an amount in this box if you only want to see matters which have a total WIP value of less than a certain amount.

More Than – Enter an amount in this box if you only want to see matters which have a total WIP value of more than a certain amount.

Private or LA – Leave on ALL for all matters, or select to show only Legal Aid or Private matters.

Current/Historical – Current gives an up to date report including any future time postings. Historical gives another box in which you can enter a date. This will then allow you to see what the WIP figure was at the date you enter.

Include Disbursements – Select Yes if you want to see disbursements aswell, or No if not.

Grouping options

No Grouping – This will produce the report in client number order

Fee earner – This will produce the report in client number order, grouped by fee earner.

Work Type – The report will be listed in client number order, grouped by work type.

List of columns produced

Client No/Matter No

Client Name

Matter Description

Fee Earner Code

Work type code

Private or Legal Aid

Remuneration Type

WIP Credit Limit

Matter LMD (Last Movement Date)

Time in Minutes

Time Value

Paid Disbursements (if you have selected to include disbursements)

Unpaid Disbursements (if you have selected to include disbursements)

WIP and Disbs total