Osprey Approach: Export Civil Legal Aid reports

This help guide was last updated on
Jul 10th, 2020

The latest version is always online at
https://support.ospreyapproach.com/?p=17621

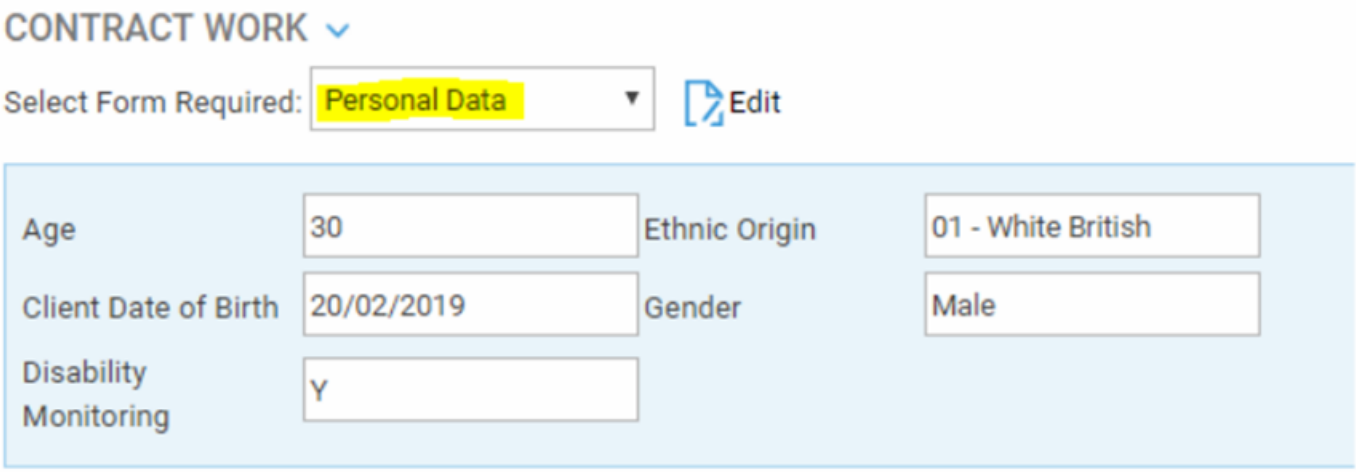
You can generate an importable CSV file for upload to the LAA portal for Civil work.

Set up the system

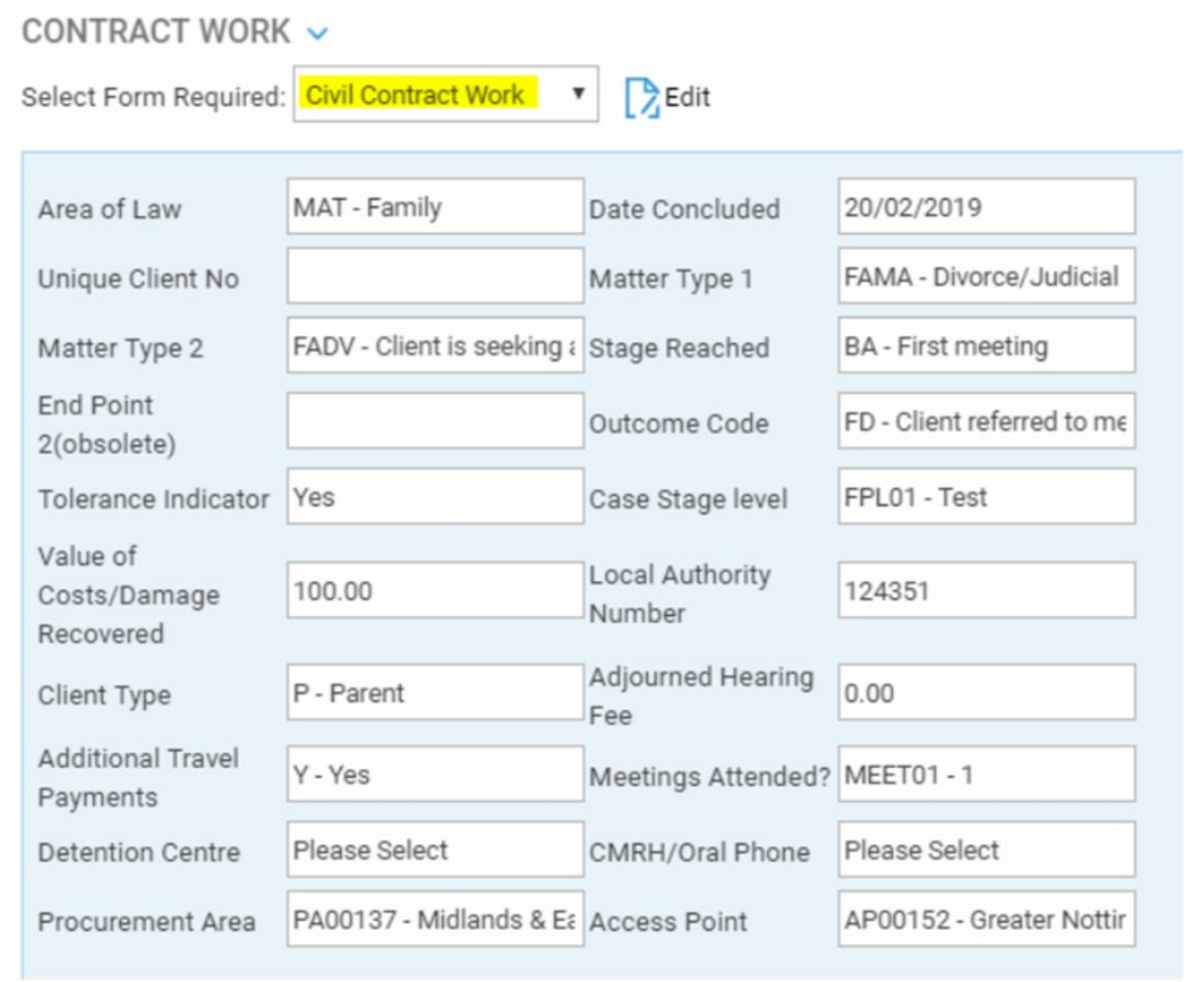
Firstly, set up your client and matter. This must have all of the following filled:

- Client forename and surname in the Matter Details
- UFN (Unique File Number) in the Matter Details
- Franchise Category (licensed and set to type Civil in Supervisor > Code Setup > Franchise Categories)
- Remuneration type which relates to civil work
- Time recording entries and ledger entries as relevant

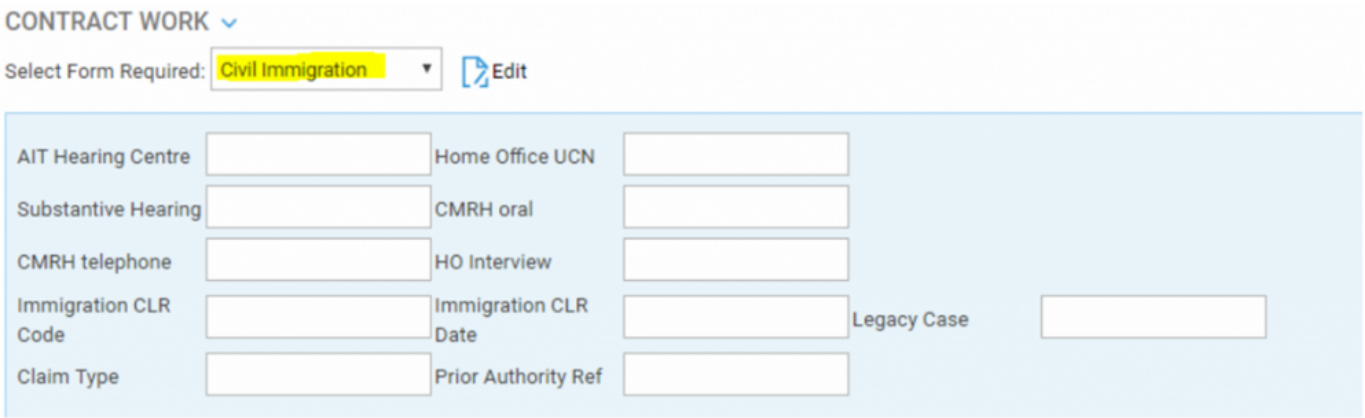
Now, ensure you have filled in the following Contract Work Pages (Case Management > Contract Work Forms):

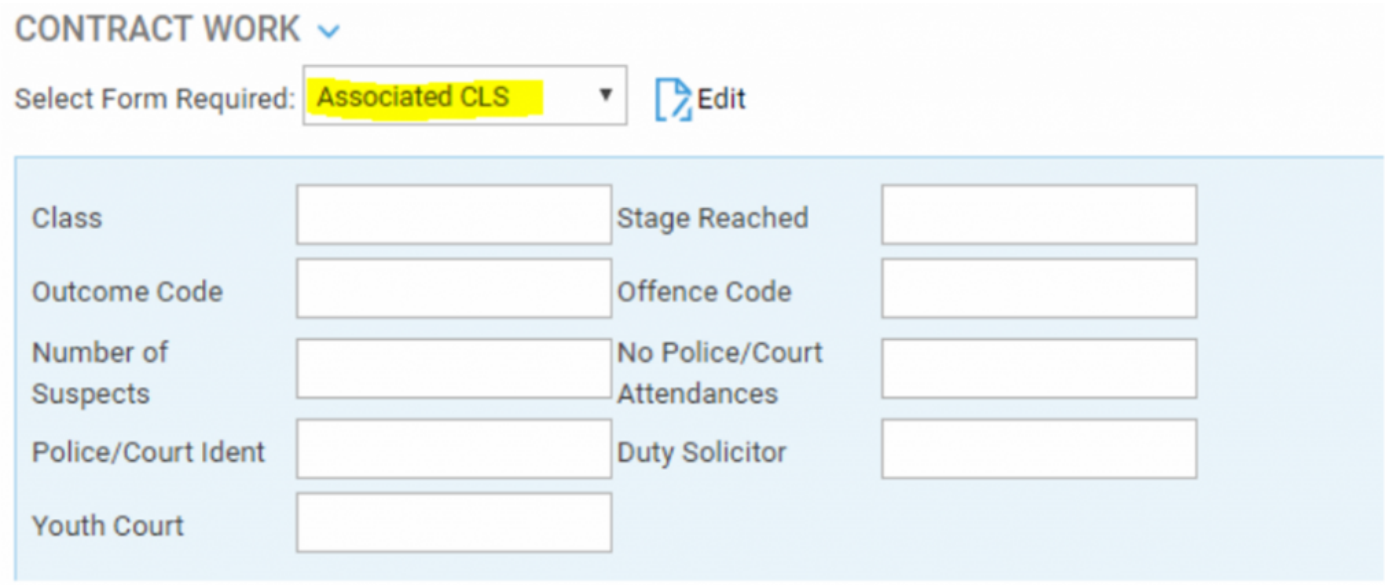


The Date Concluded is used when running the report to determine which matters to show:

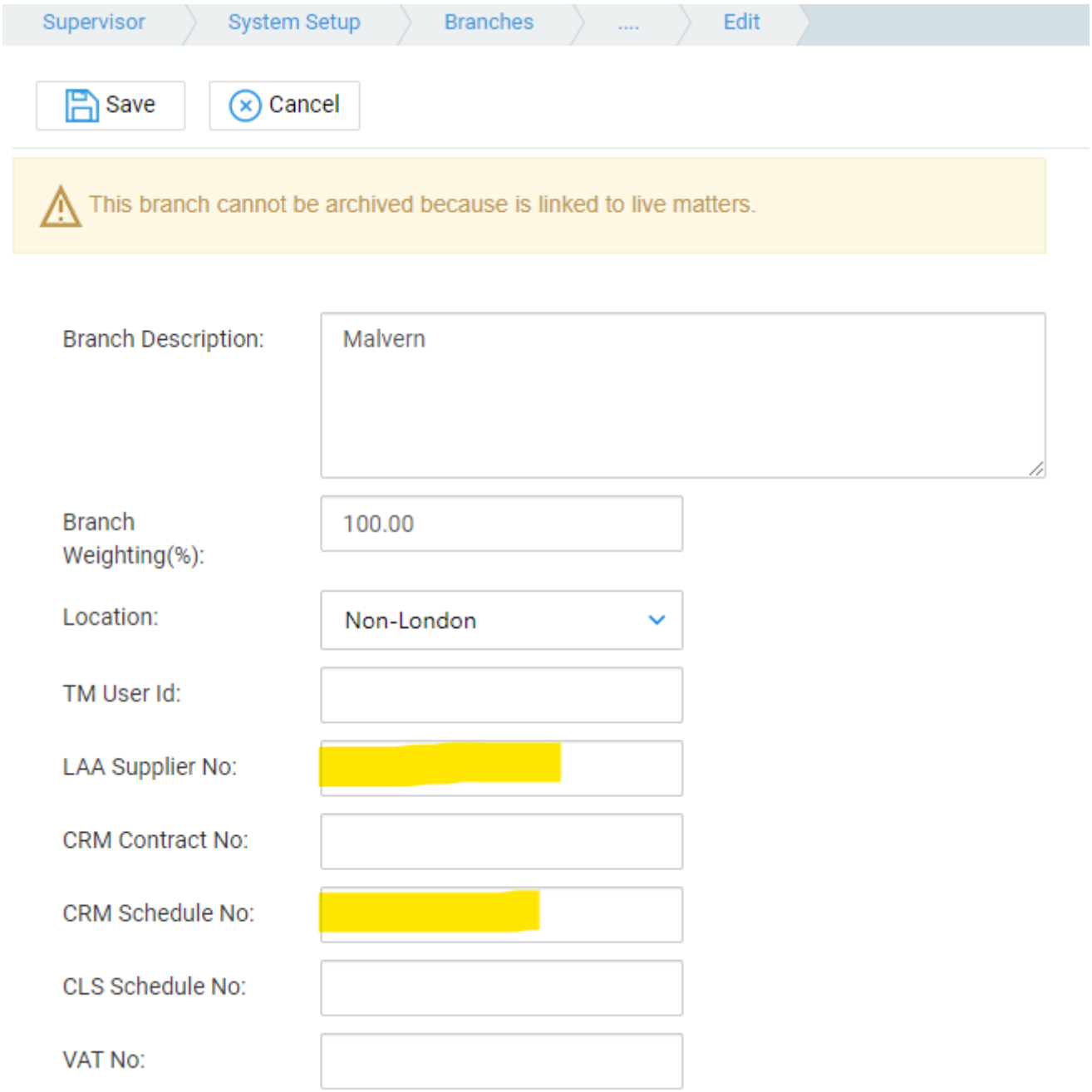


And if relevant, depending on the type of work:



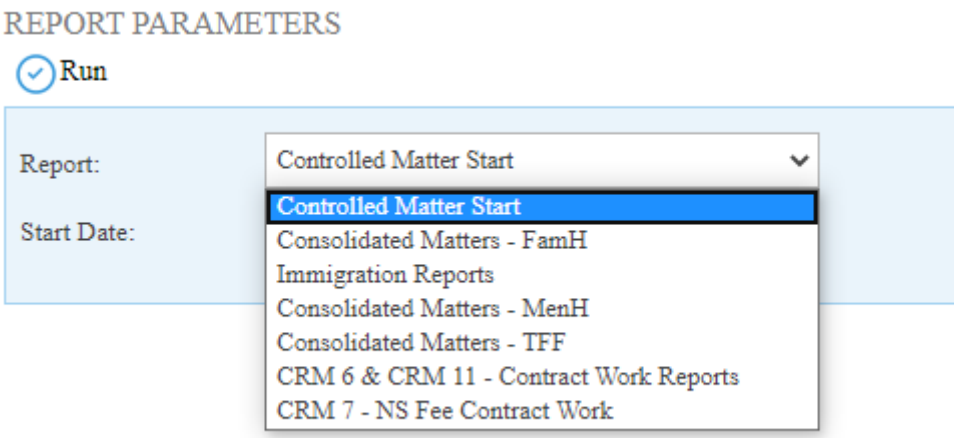


Navigate to Supervisor > System Setup > Branches and ensure that your branches have the LAA Supplier number and CLS Schedule number set:

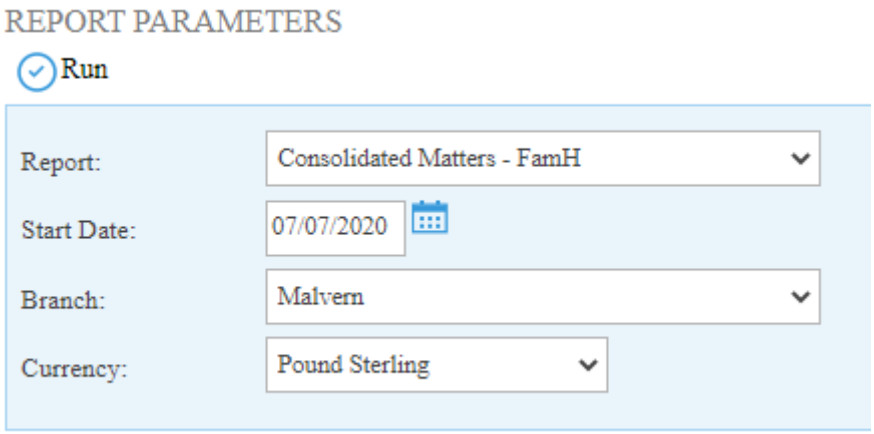


Run the reports

Navigate to Reports > Miscellaneous > Contract Work, and choose the report you want to print:



Select the Start Date, Branch and Currency as relevant, then click Run:



The report will open, you can print it if required, and Export to CSV for online submission:

