



Osprey Approach: Reports: Fees Analysis By Time Fee Earner Report

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The latest version is always online at
<https://support.ospreyapproach.com/?p=32790>



Reports Fees billed, according to the percentage of the time ticked against the bill (where bills have no time ticked, the default is to allocate fees to the Matter fee earner. Where the bill costs are higher or lower than the time ticked, the costs billed will be split by the time fee earners at the same percentage as the time was posted). See also Fees Analysis and Fees Analysis Apportioned Costs.



Fees Analysis by Time Fee Earner Report by FE

| | | | | | | | | | | | | | | |
|----------------------------------|----------|----------|----------|----------|----------|------------|----------|-----------------------------|----------|-----------|-----------------------------|-----------|-----------|-----------|
| Practice Name: Broom & Broom Ltd | | | | | Year: 2 | Period: 10 | | Accounting Date: 31/07/2022 | | | Date Report Run: 18/07/2022 | | | |
| FE | Period 1 | Period 2 | Period 3 | Period 4 | Period 5 | Period 6 | Period 7 | Period 8 | Period 9 | Period 10 | Period 11 | Period 12 | Period 13 | Total |
| BT | 1,000.00 | -11.41 | -813.33 | -123.00 | 144.22 | 2,100.67 | 834.00 | 120.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3,251.14 |
| MAB | 0.00 | 91.41 | 200.00 | 223.00 | 792.04 | 2,895.05 | 3,800.79 | 1,200.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 9,202.29 |
| TP | 0.00 | 0.00 | 30.00 | 0.00 | 207.32 | 18.10 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 255.42 |
| Total | 1,000.00 | 80.00 | -583.33 | 100.00 | 1,143.58 | 5,013.81 | 4,634.79 | 1,320.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 12,708.85 |

CROSS TAB VERSION



Fees Analysis by Time Fee Earner FE List

Practice Name: Broom & Broom Ltd

Year: 2 Period: 10 Accounting Date: 31/07/2022 Date Report Run: 18/07/2022

| Fee Earner ID | BT |
|---------------|----------------|
| Fee Earner | Work Type |
| Period | Amount |
| Benmont Tench | 1 1,000.00 |
| Benmont Tench | 2 -11.41 |
| Benmont Tench | 3 -813.33 |
| Benmont Tench | 4 -123.00 |
| Benmont Tench | 5 144.22 |
| Benmont Tench | 6 2,100.67 |
| Benmont Tench | 7 834.00 |
| Benmont Tench | 8 120.00 |
| Benmont Tench | Total 3,251.14 |
| Fee Earner ID | MAB |
| Fee Earner | Work Type |
| Period | Amount |
| Mitzi Broom | 2 91.41 |
| Mitzi Broom | 3 200.00 |
| Mitzi Broom | 4 223.00 |
| Mitzi Broom | 5 792.04 |
| Mitzi Broom | 6 2,895.05 |
| Mitzi Broom | 7 3,800.79 |
| Mitzi Broom | 8 1,200.00 |
| Mitzi Broom | Total 9,202.29 |
| Fee Earner ID | TP |
| Fee Earner | Work Type |
| Period | Amount |
| Thomas Petty | 3 30.00 |
| Thomas Petty | 5 207.32 |
| Thomas Petty | 6 18.10 |
| Thomas Petty | Total 255.42 |

LIST VERSION

Filter Options

Reports

Analysis

Fees Analysis By Time FE

✓ Run

Report Type:

Year

▼

Year:

2

▼

Branch:

ALL

▼

Currency:

Pound Sterling

▼

Report Format:

Cross Tab

▼

Grouping:

Fee Earner & Work Type by Peri

▼

- **Report Type** – Year or Specific Period.
- **Year** – List selection of current and previous years, by default the current year is selected.
- **Period** – Only available if Specific Period is selected in the Report Type option. List selection of periods completed to date, by default the current period is selected.
- **Branch** – List selection of branches, by default branch *ALL* is selected.
- **Currency** – List selection of all the currencies set on the system, this selection will show only those matters set for the particular currency.
- **Grouping** – This shows three differing reports:
 - Fee Earner & Work Type by Period
 - Fee Earner by Period
 - Work Type by Period
- **Report Format** – Cross Tab or List, the default is to show cross tab.

List of Columns Produced

- Work Type or Fee Earner (*depending on the grouping*)
- Period 1 Fees
- Period 2 Fees
- Period 3 Fees
- Period 4 Fees
- Period 5 Fees
- Period 6 Fees
- Period 7 Fees
- Period 8 Fees
- Period 9 Fees
- Period 10 Fees
- Period 11 Fees
- Period 12 Fees
- Period 13 Fees
- Total

Additional Functionality

Reports

Analysis

Fees Analysis By Time FE

✓Run

Report Type:

Specific Period

Year:

2

Period:

10

Branch:

ALL

Currency:

Pound Sterling

Report Format:

List

Grouping:

Fee Earner by Period

Fee Earner & Work Type by Period

Fee Earner by Period

Work Type by Period

Bills by Fee Earner

When Specific Period is selected, and the Report Format is set to List, an additional grouping is also available - Bills by Fee Earner. This report gives you a breakdown of the billed time / costs which have been allocated to each fee earner. In the example below, we can see that Bill Number 131 was split between fee earners MAB and TP.

Practice Name: Broom & Broom Ltd

Year: 2 Period: 10 Accounting Date: 31/07/2022 Date Report Run: 18/07/2022

| Fee Earner: BT | | Benmont Tench | | | | |
|----------------------|-----------|---------------|------------|-----------|--------|---------|
| Bill no | Client_No | Matter No | Bill Date | Work Type | Period | Amount |
| 123 | BR0001 | 1 | 06/12/2021 | CONVEY | 3 | -583.33 |
| 132 | BR0001 | 7 | 06/12/2021 | CONVEY | 3 | -230.00 |
| Total for Fee Earner | | | | | | -813.33 |
| Fee Earner: MAB | | Mitzi Broom | | | | |
| Bill no | Client_No | Matter No | Bill Date | Work Type | Period | Amount |
| 131 | BR0001 | 7 | 06/12/2021 | CONVEY | 3 | 200.00 |
| Total for Fee Earner | | | | | | 200.00 |
| Fee Earner: TP | | Thomas Petty | | | | |
| Bill no | Client_No | Matter No | Bill Date | Work Type | Period | Amount |
| 131 | BR0001 | 7 | 06/12/2021 | CONVEY | 3 | 30.00 |
| Total for Fee Earner | | | | | | 30.00 |
| Total for Report | | | | | | -583.33 |