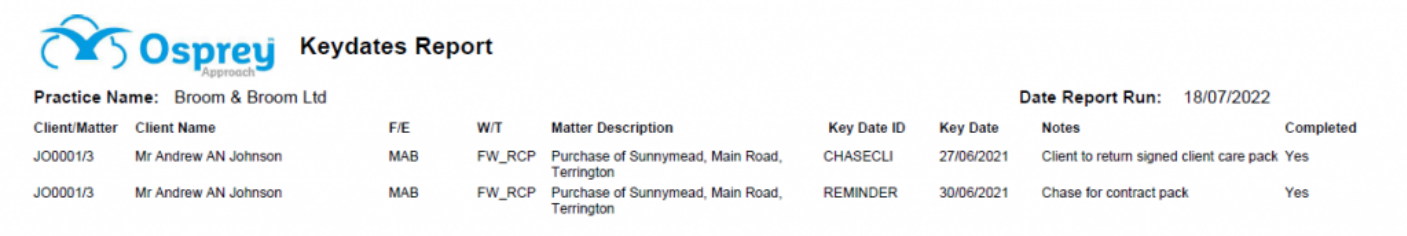
Osprey Approach: Reports: Key Dates Report

This help guide was last updated on
Jul 25th, 2022

The latest version is always online at
https://support.ospreyapproach.com/?p=32792

This report lists the Key Dates that have been set according to the filters and groupings selected, by default the report shows *ALL key* dates whether they are completed or not, sorted in client number, then date order.

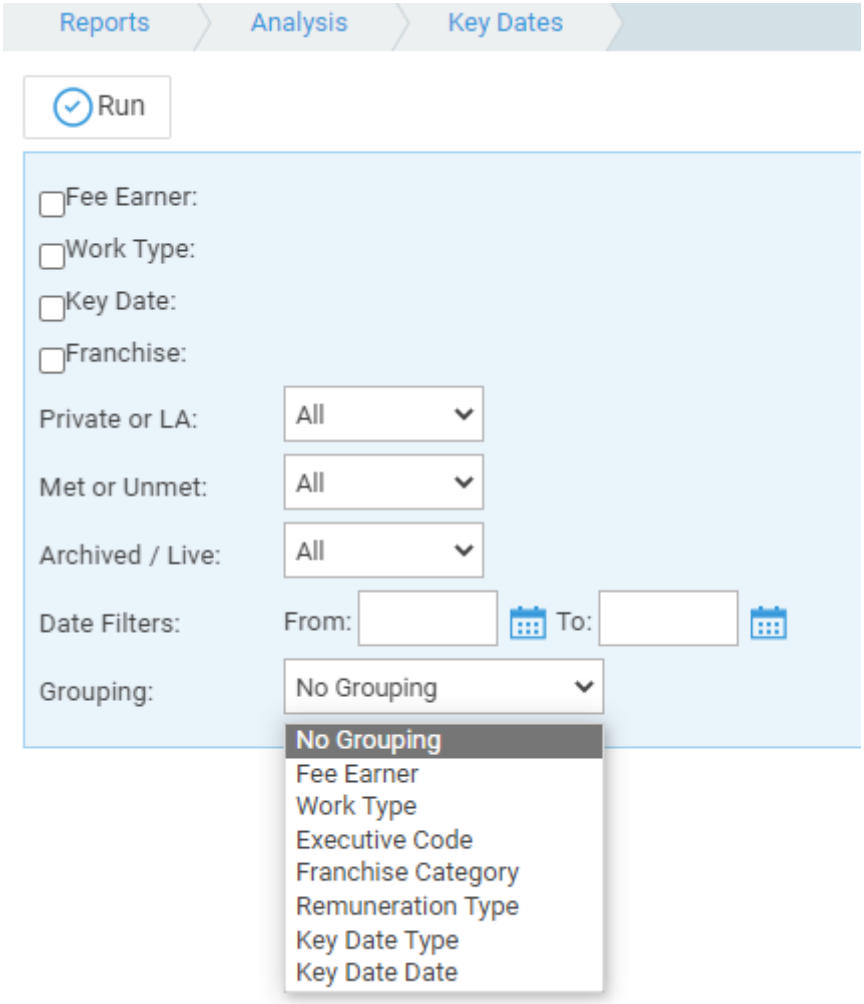


Keydates Report

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

Client/Matter	Client Name	F/E	W/T	Matter Description	Key Date ID	Key Date	Notes	Completed
JO0001/3	Mr Andrew AN Johnson	MAB	FW_RCP	Purchase of Sunnymead, Main Road, Terrington	CHASECLI	27/06/2021	Client to return signed client care pack	Yes
JO0001/3	Mr Andrew AN Johnson	MAB	FW_RCP	Purchase of Sunnymead, Main Road, Terrington	REMINDER	30/06/2021	Chase for contract pack	Yes

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.
- **Key Date -** Tick this box if you want to show only one or a selection of Key Dates. Once the box is ticked all key dates marked as In Use will appear. You can then tick each one that you want to

report on. If you want to see all key dates, do not tick the Key Date box and it will produce all key dates.
- **Franchise -** Tick this box if you want to show only one or a selection of Franchises. Once the box is ticked all Franchises marked as In Use will appear. You can then tick each one that you want to report on. If you want to see all Franchises, do not tick the Franchise box and it will produce all Franchises.
- **Private or LA -** If left on All, this will show both Private and Legal Aid clients matters. You can choose to show only Private or Legal Aid clients by selecting the appropriate option.
- **Met or Unmet -** If left on All, this will show both Met and Unmet key dates. You can choose to show only Met or Unmet by selecting the appropriate option.
- **Archived / Live -** If left on All, this will show both Archived and Live clients matters. You can choose to show only Archived or Live clients by selecting the appropriate option.
- **Date Filters -** 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

- **No Grouping** – orders in Client/Matter number order, followed by date.
- **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.
- **Executive Code** - shows a listing with the filters selected and additionally groups matters for Executive Codes together.
- **Franchise Category** - shows a listing with the filters selected and additionally groups matters for Franchise Categories together.
- **Remuneration Type** - shows a listing with the filters selected and additionally groups matters for Remuneration Types together.
- **Key Date Type** - shows a listing with the filters selected and additionally groups matters for Key Date Types together.
- **Key Date Date** - shows a listing with the filters selected and additionally groups matters for Key Date Dates together.

List of Columns Produced

- Client/Matter
- Client Name
- F/E
- W/T
- Matter Description
- Key Date ID
- Key Date
- Notes
- Completed