Osprey Approach: Reports: New Matters

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The latest version is always online at
https://support.ospreyapproach.com/?p=32798

Osprey™ Approach

This generates a report on matters opened between any two given dates, whether they have been subsequently archived or not.



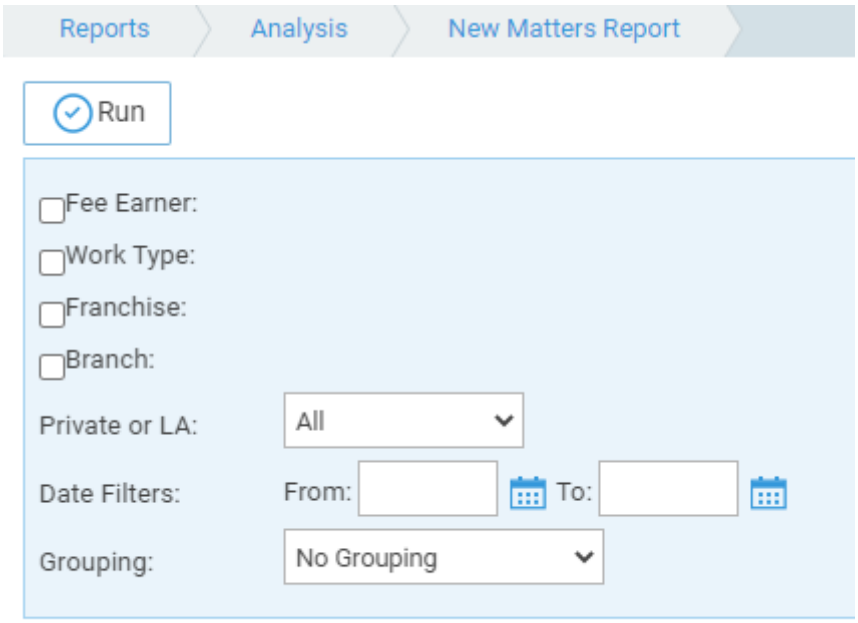
Osprey Approach **New Matters**

Practice Name: Broom & Broom Ltd **Date Report Run:** 07/12/2021

Client/Matter	Client Name	Br	Dept	Matter Description	F/E	W/T P/L	Franchise	Remuneration	Opened	Exec
A00001/1	Admin	1	1	Admin Matter	TP	CONVEY P		STANDARD	19/10/2019	
BO00000001/2	Boden	1	1	Intellectual Property	BT	CONVEY P		FIXEDFEE	29/06/2020	
BR0001/1	Broom	2	1	Purchase of Cottage	BT	CONVEY P		STANDARD	26/11/2019	
BR0001/5	Broom	1	1	House purchase	BT	CONVEY P		STANDARD	23/09/2020	

New Matters example

Filter Options



- **Fee Earner** - Tick this box if you want to show only one or a selection of fee earners, or leave blank for all
- **Work Type** - Tick this box if you want to show only one or a selection of work types, or leave blank for all
- **Franchise** - Tick this box if you want to show only one or a selection of Franchises, or leave blank for all
- **Branch** – Tick this box if you want to show only one or a selection of Branches, or leave blank for all
- **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.
- **Date Filters** – If left blank, this will show all new matters, you can choose to show only those new matters between particular dates by populating both the From and To date boxes.

Grouping Options

- **No Grouping** – report is sorted by client no and matter no
- **Fee Earner** – report groups matters for Fee Earners together with a count of matters per fee earner

- **Work Type** - report groups matters for Work Types together with a count of matters per work type
- **Franchise Category** - report groups matters for Franchise Categories together with a count of matters per franchise
- **Private Or LA** - report groups matters for Private Or Legal Aid together with a count of matters per P/L status

List of Columns produced

- Client/Matter
- Client Name
- Branch
- Department
- Matter Description
- F/E
- W/T
- P/L
- Franchise
- Remuneration
- Opened
- Exec