Osprey Approach: Reports: Work In Progress

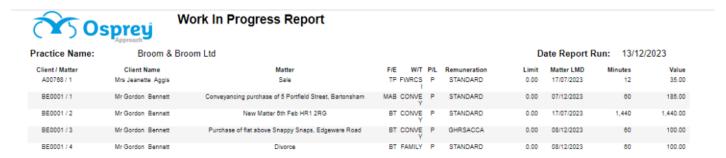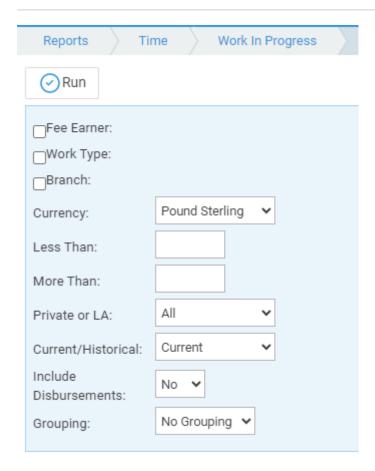Click here for a printer-friendly version

This report shows the total per matter of all Work In Progress (unbilled time which shows on the time ledger). All time values are attributed to the Matter Fee Earner (see also WIP By Time F/E).

Work In Progress Report

Practice Name:	Broom & Broom Ltd						Date Report Run:	13/12/2023		
Client / Matter	Client Name	Matter	F/E	W/T	P/L	Remuneration	Limit	Matter LMD	Minutes	Value
A00768 / 1	Mrs Jeanette Aggis	Sale	TP	FWRCS I	P	STANDARD	0.00	17/07/2023	12	35.00
BE0001 / 1	Mr Gordon Bennett	Conveyancing purchase of 5 Portfield Street, Bartonsham	MAB	CONVE Y	P	STANDARD	0.00	07/12/2023	60	185.00
BE0001 / 2	Mr Gordon Bennett	New Matter 6th Feb HR1 2RG	BT	CONVE Y	P	STANDARD	0.00	17/07/2023	1,440	1,440.00
BE0001 / 3	Mr Gordon Bennett	Purchase of flat above Snappy Snaps, Edgeware Road	BT	CONVE Y	P	GHRSACCA	0.00	08/12/2023	60	100.00
BE0001 / 4	Mr Gordon Bennett	Divorce	BT	FAMILY	P	STANDARD	0.00	08/12/2023	60	100.00

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, leave the box unticked.
- **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, leave the box unticked.
- **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 only Private matters.
- **Current/Historical** – Select current to produce an up to date report including any future time postings. Select Historical to enter an As At date to view the WIP figure at.
- **Include Disbursements** – Selecting Yes will produce additional columns to show the total disbursements per matter.

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 and subtotalled by fee earner.
- **Work Type** – The report will be listed in client number order, grouped and subtotalled by work type.

List of Columns Produced

- If Include Disbursements is set to Yes
    - Client / Matter
    - Client Name
    - Matter
    - W/T
    - P/L
    - Remuneration
    - Limit
    - Matter LMD
    - Minutes
    - Value
    - Paid Disbs
    - Unpaid Disbs
    - WIP Disbs Total
- If Include Disbursements is set to No
    - Client / Matter
    - Client Name
    - Matter
    - W/T
    - P/L
    - Remuneration
    - Limit
    - Matter LMD
    - Minutes
    - Value