



Release Notes

Update: v1.29.0

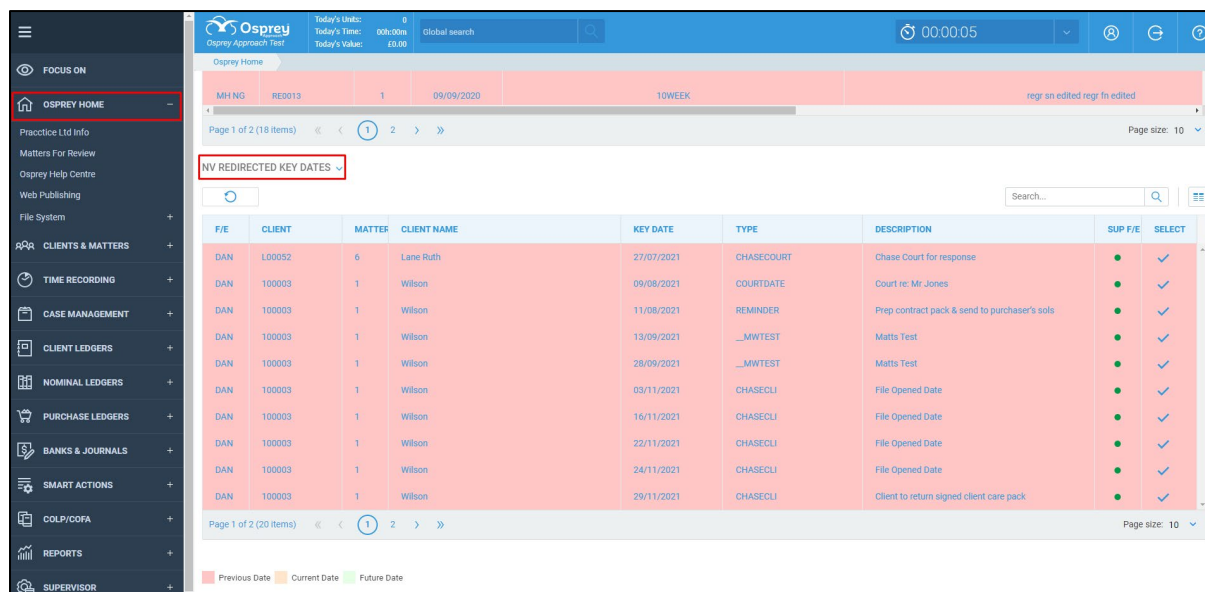
Web Browser

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Redirected Key Dates

Previously, redirected key dates were not visible from the home screen of Osprey. In this update, the home screen now has a tab for redirected key dates.



F/E	CLIENT	MATTER	CLIENT NAME	KEY DATE	TYPE	DESCRIPTION	SUP F/E	SELECT
DAN	L00052	6	Lane Ruth	27/07/2021	CHASECOURT	Chase Court for response	●	✓
DAN	100003	1	Wilson	09/08/2021	COURTDATE	Court re: Mr Jones	●	✓
DAN	100003	1	Wilson	11/08/2021	REMINDER	Prep contract pack & send to purchaser's solicitor	●	✓
DAN	100003	1	Wilson	13/09/2021	__MWTEST	Matts Test	●	✓
DAN	100003	1	Wilson	28/09/2021	__MWTEST	Matts Test	●	✓
DAN	100003	1	Wilson	03/11/2021	CHASECLI	File Opened Date	●	✓
DAN	100003	1	Wilson	16/11/2021	CHASECLI	File Opened Date	●	✓
DAN	100003	1	Wilson	22/11/2021	CHASECLI	File Opened Date	●	✓
DAN	100003	1	Wilson	24/11/2021	CHASECLI	File Opened Date	●	✓
DAN	100003	1	Wilson	29/11/2021	CHASECLI	Client to return signed client care pack	●	✓

Bill Addressee

The bill addressee name field now has a new maximum of 100 characters.

Matter Description

The matter description field now has a new maximum of 255 characters.

Nominal Ledger

Previously, when posting Nominal Transfer to / from an account the user cannot scroll.

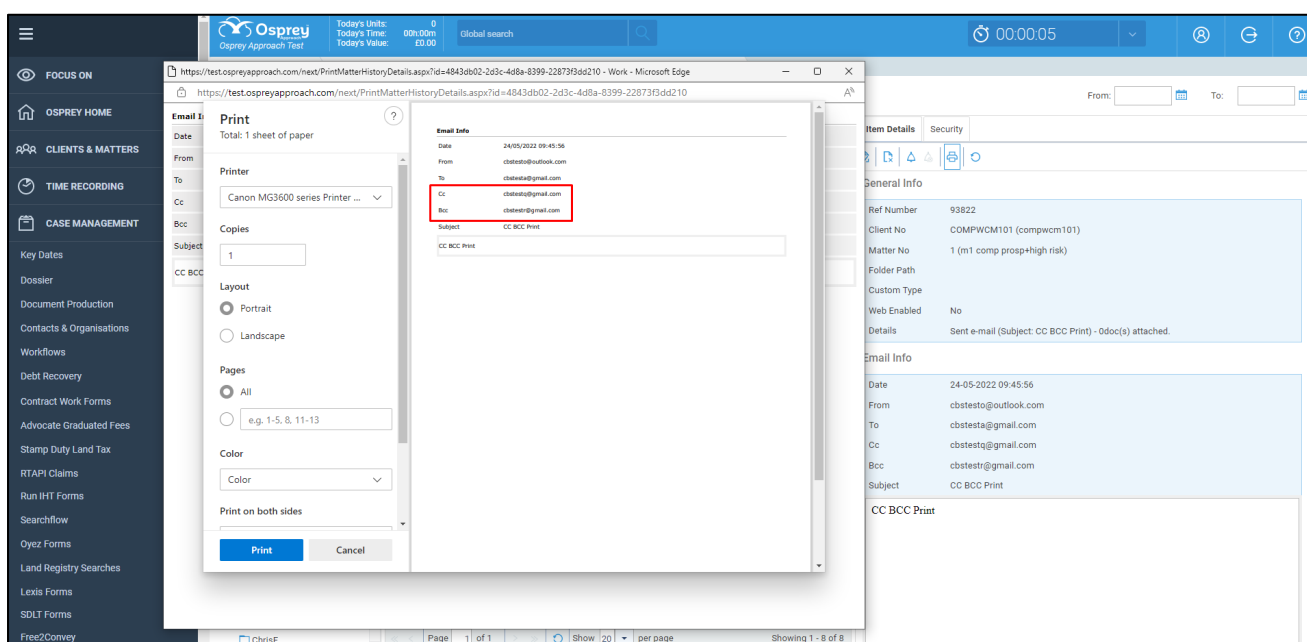
In this update, users can scroll as expected.

Email Signature

This update has ensured that the email signature settings that are selected when 'save' is clicked are retained. For example, when the 'use branch' signature is selected, it'll no longer save as 'inherit from system' instead.

Email CC / BCC Fields

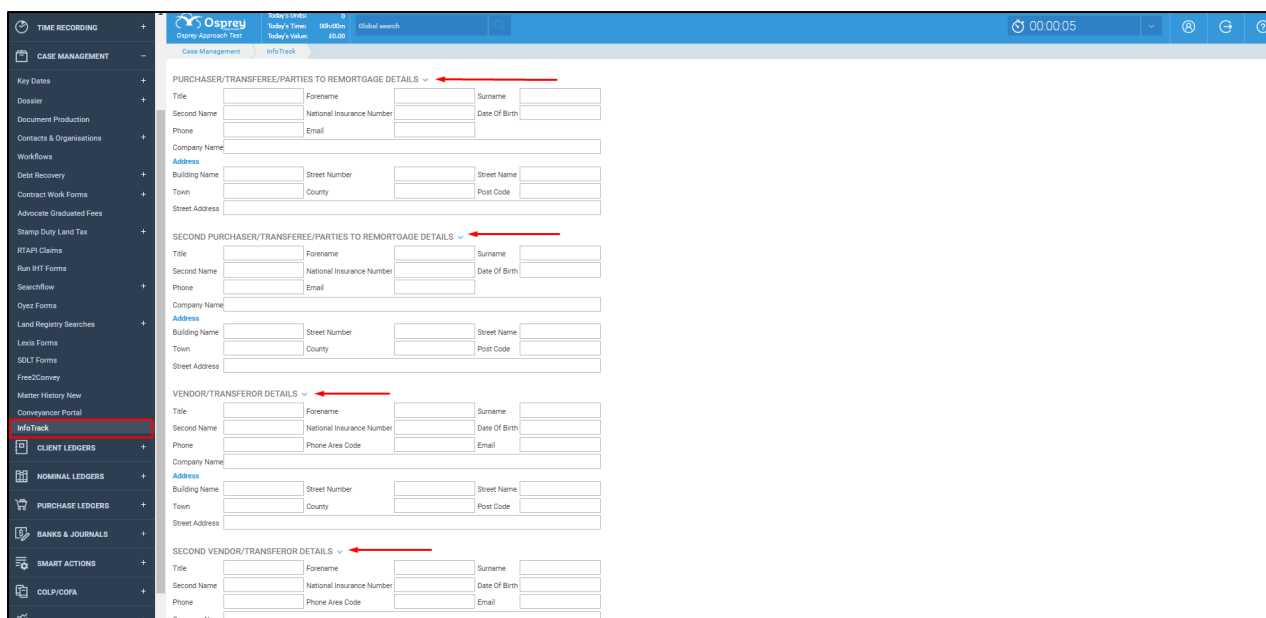
Previously, when printing emails, the CC / BCC fields would not show. In this update, they display as expected.



InfoTrack labels

Previously, when using the conveyancing app, the labels on the InfoTrack form led users to believe it was not applicable for certain worktypes e.g. Remortgage.

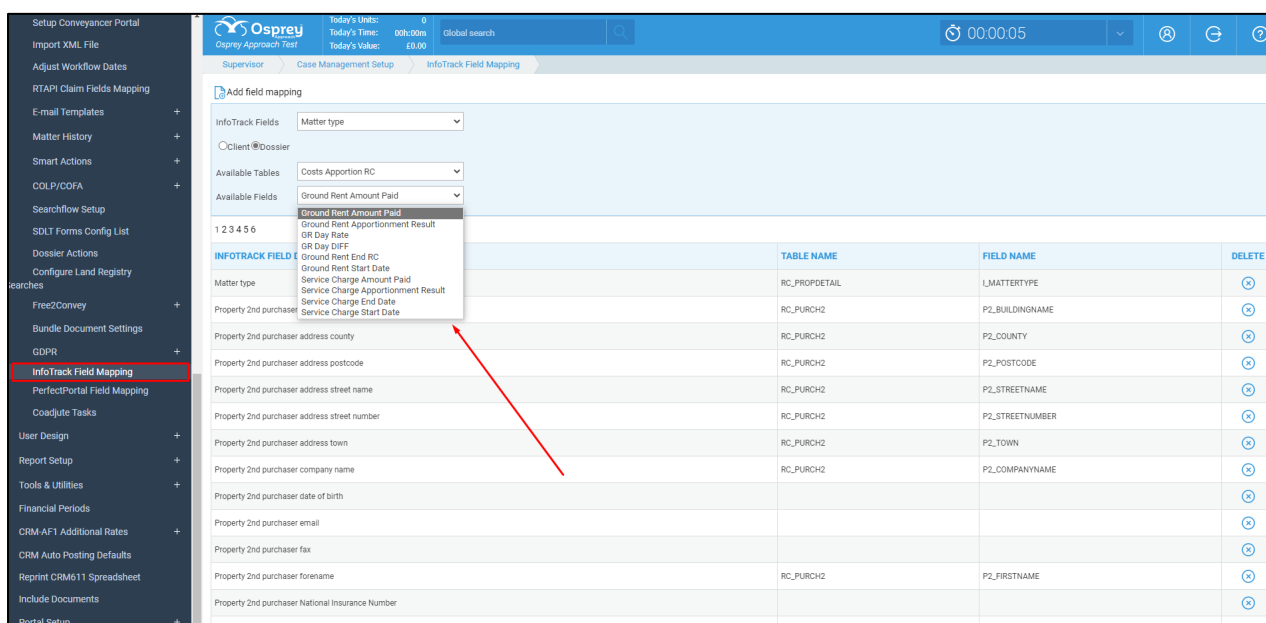
In this update, the labels have been updated.



InfoTrack Formula Mapping

Previously, users were unable to map formula dossier fields within InfoTrack field mapping.

In this update, formula dossier InfoTrack fields can now be mapped.

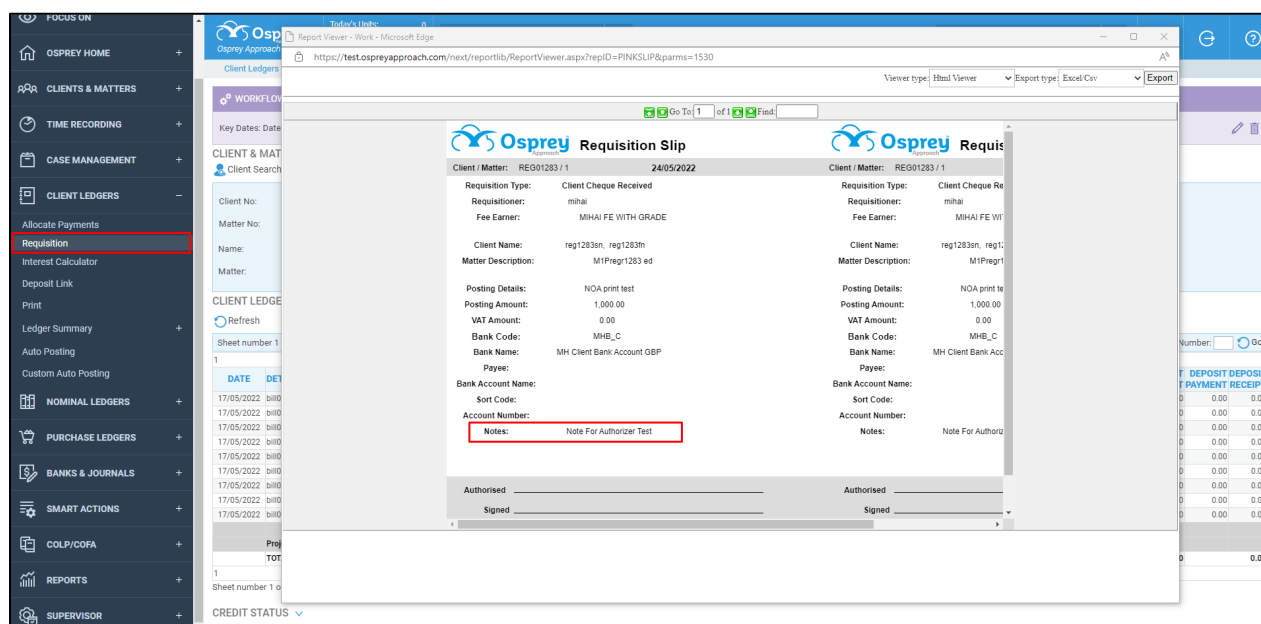


INFOTRACK FIELD	TABLE NAME	FIELD NAME	DELETE
Matter type	RC_PROPDETAIL	L_MATTERTYPE	
Property 2nd purchaser	RC_PURCH2	P2_BUILDINGNAME	
Property 2nd purchaser address county	RC_PURCH2	P2_COUNTY	
Property 2nd purchaser address postcode	RC_PURCH2	P2_POSTCODE	
Property 2nd purchaser address street name	RC_PURCH2	P2_STREETNAME	
Property 2nd purchaser address street number	RC_PURCH2	P2_STREETNUMBER	
Property 2nd purchaser address town	RC_PURCH2	P2_TOWN	
Property 2nd purchaser company name	RC_PURCH2	P2_COMPANYNAME	
Property 2nd purchaser date of birth			
Property 2nd purchaser email			
Property 2nd purchaser fax			
Property 2nd purchaser forename	RC_PURCH2	P2_FIRSTNAME	
Property 2nd purchaser National Insurance Number			
Property 2nd purchaser phone	RC_PURCH2	P2_TELEPHONE	

Requisition Slip

Previously, when a requisition was raised, the notes for authoriser were not added to the printable slip.

In this update, the requisition slip will now display the notes to the authoriser.

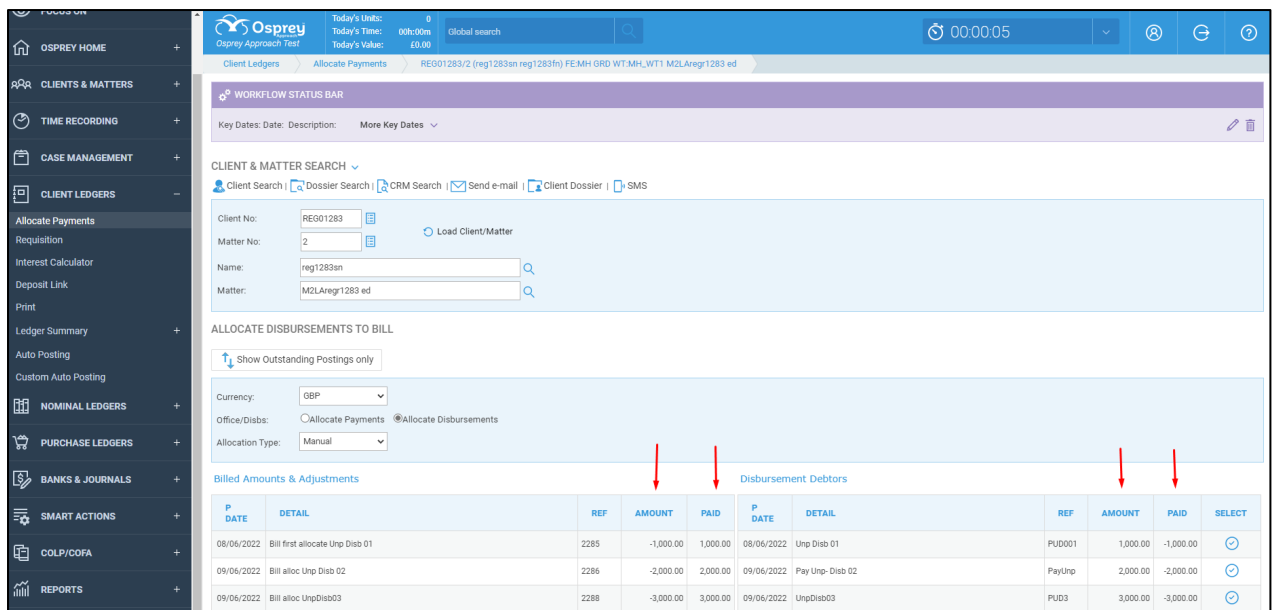


Unpaid Disbursement

Previously, unpaid disbursements became unallocated when the bill was paid.

In this update, when a “pay unpaid disbursement” posting is made, any allocations from the original unpaid disbursement should be amended to refer to the new posting ID to avoid allocation issues.

Note: Verify that the balance remains null in Client Ledger > Allocate Payments > select Allocate Disbursements radio-button > click Show All Postings.



Osprey Approach Test

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

Client Ledgers Allocate Payments REG01283/2 (reg1283sn reg1283fn) FEMH GRD WT:MH,WT1 M2LAreg1283 ed

WORKFLOW STATUS BAR

Key Dates: Date: Description: More Key Dates

CLIENT & MATTER SEARCH

Client Search | Dossier Search | CRM Search | Send e-mail | Client Dossier | SMS

Client No: REG01283
Matter No: 2
Name: reg1283sn
Matter: M2LAreg1283 ed

Load Client/Matter

ALLOCATE DISBURSEMENTS TO BILL

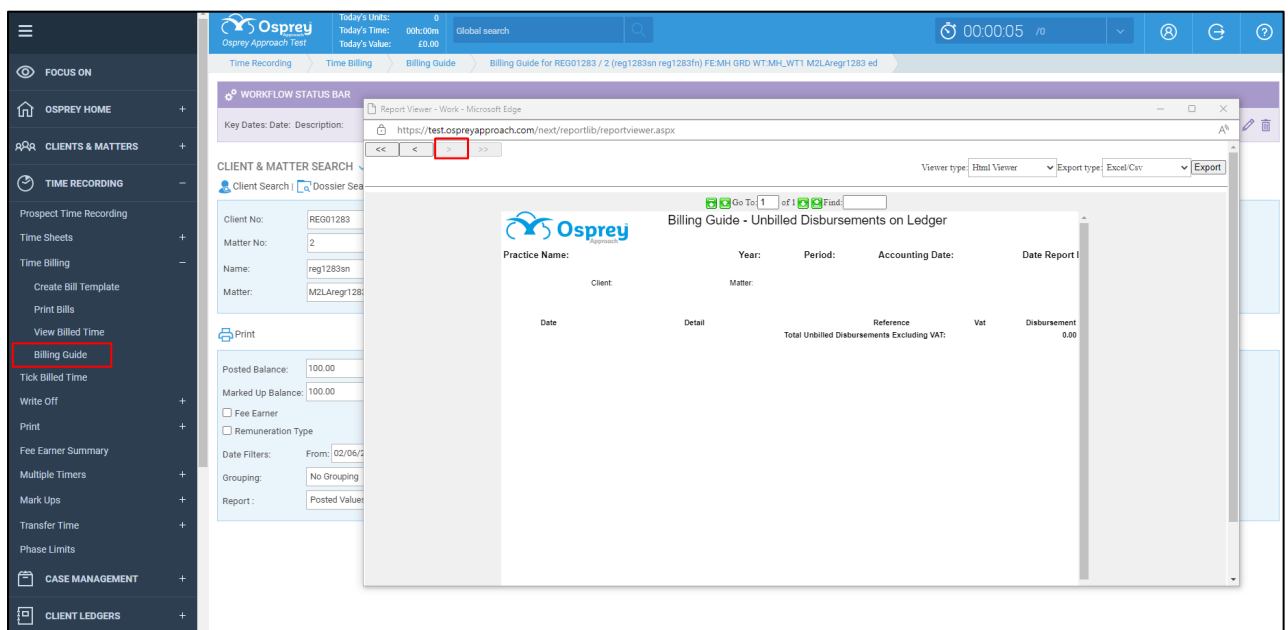
Show Outstanding Postings only

Currency: GBP
Office/Disbs: Allocate Payments Allocate Disbursements
Allocation Type: Manual

Billed Amounts & Adjustments

P DATE	DETAIL	REF	AMOUNT	PAID	P DATE	DETAIL	REF	AMOUNT	PAID	SELECT
08/06/2022	Bill first allocate Unp Disb 01	2285	-1,000.00	1,000.00	08/06/2022	Unp Disb 01	PUD001	1,000.00	-1,000.00	⌂
09/06/2022	Bill alloc Unp Disb 02	2286	-2,000.00	2,000.00	09/06/2022	Pay Unp Disb 02	PayUnp	2,000.00	-2,000.00	⌂
09/06/2022	Bill alloc Unp Disb 03	2288	-3,000.00	3,000.00	09/06/2022	Unp Disb 03	PUD03	3,000.00	-3,000.00	⌂

Also verify if the balance remains null on the report from Time Recording > Time Billing > Billing Guide > click Print > click the forward arrow from the report.



Osprey Approach Test

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

Time Recording Time Billing Billing Guide Billing Guide for REG01283 / 2 (reg1283sn reg1283fn) FEMH GRD WT:MH,WT1 M2LAreg1283 ed

WORKFLOW STATUS BAR

Key Dates: Date: Description: More Key Dates

CLIENT & MATTER SEARCH

Client Search | Dossier Search

Client No: REG01283
Matter No: 2
Name: reg1283sn
Matter: M2LAreg1283 ed

Print

Posted Balance: 100.00
Marked Up Balance: 100.00
Fee Earner
Remuneration Type
Date Filters: From: 02/06/2022
Grouping: No Grouping
Report: Posted Values

Billing Guide - Unbilled Disbursements on Ledger

Practice Name: Year: Period: Accounting Date: Date Report

Client: Matter:

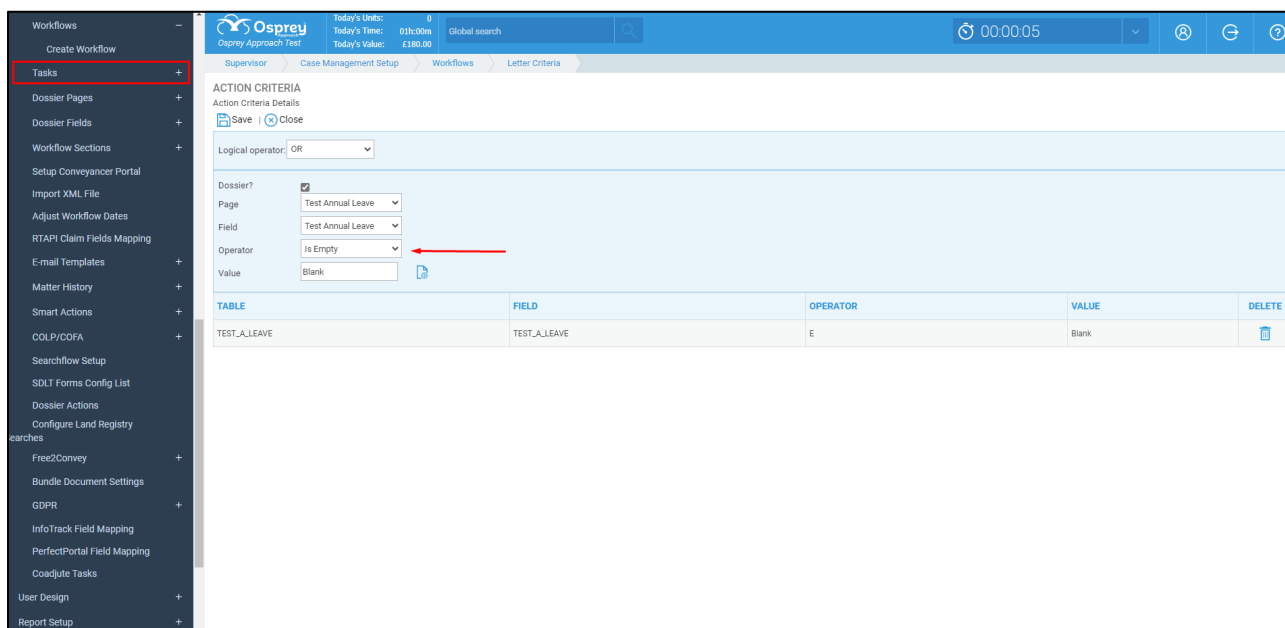
Date Detail Reference Vat Disbursement

Total Unbilled Disbursements Excluding VAT: 0.00


Date Field criteria if empty

Previously, if the criteria of a workflow task (that is set against a date field) is blank, the action still performs.

In this update, criteria that is set against workflows tasks will only be performed when date fields are empty / not empty, as set out by the criteria rules.

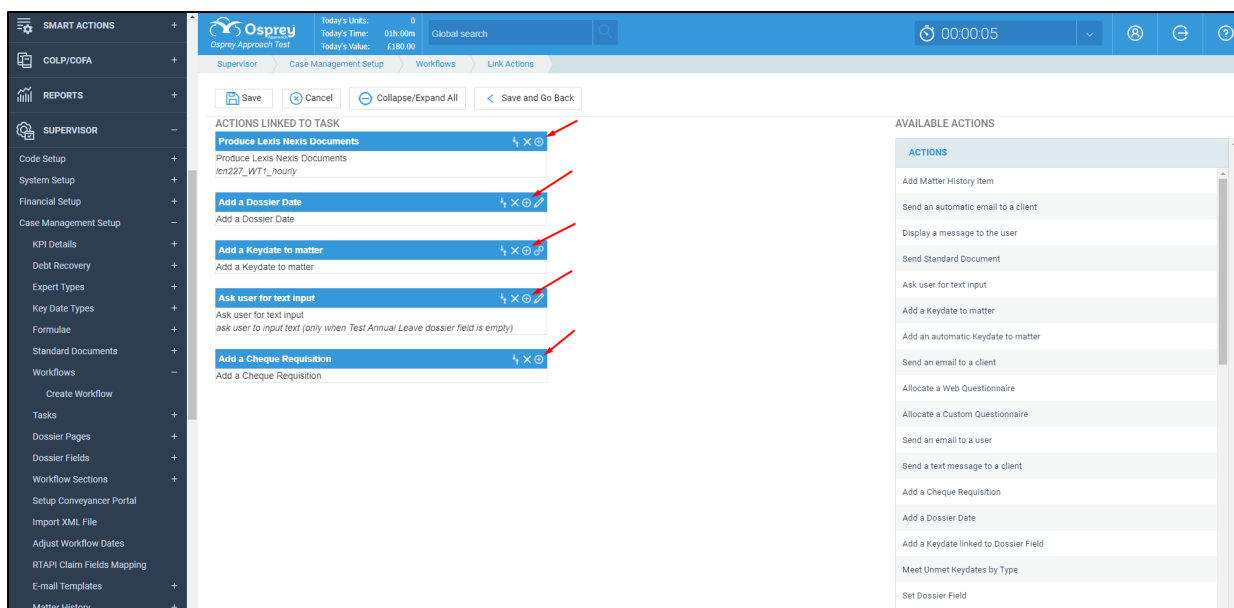


The screenshot shows the 'ACTION CRITERIA' configuration window in the Osprey Approach Test application. The 'Logical operator' is set to 'OR'. The 'Dossier?' checkbox is checked. The 'Page' is 'Test Annual Leave'. The 'Field' is 'Test Annual Leave'. The 'Operator' is 'Is Empty' (highlighted with a red arrow). The 'Value' is 'Blank'. Below the configuration, a table lists the criteria:

TABLE	FIELD	OPERATOR	VALUE	DELETE
TEST_A_LEAVE	TEST_A_LEAVE	E	Blank	

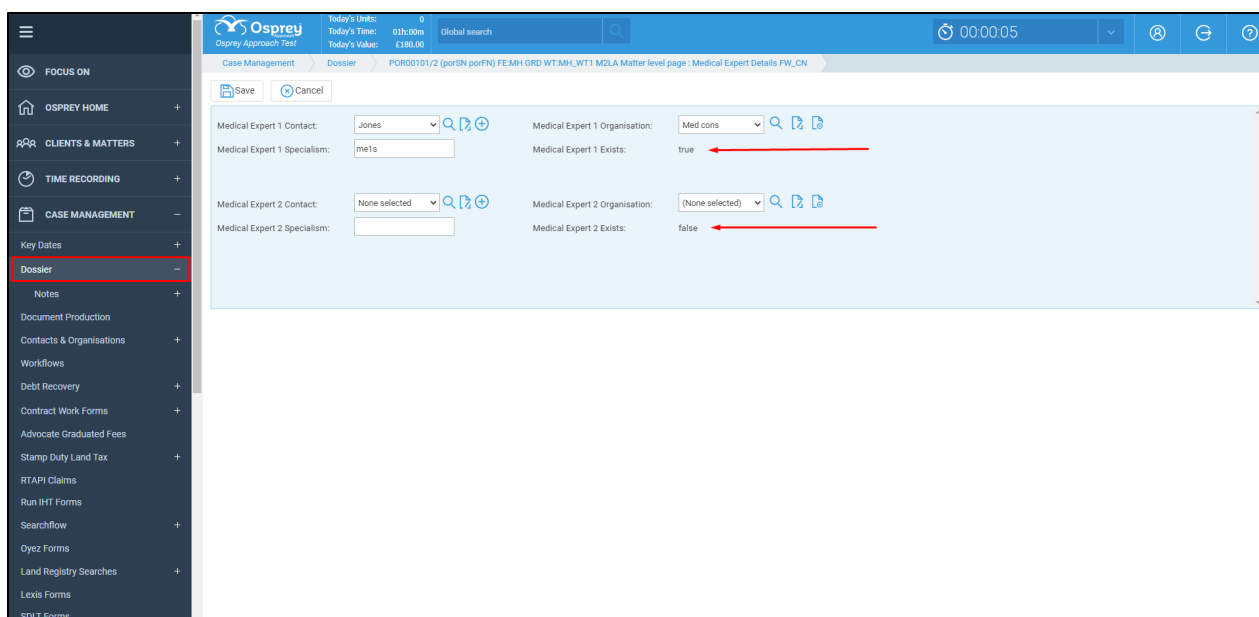
Criteria against more tasks

In this update, users can now set criteria (when running a workflow) to a number of additional tasks including Produce Lexis Nexis Document, Add a Dossier Date, Add a Keydate to matter, Ask user for text input, and add cheque requisition.



Formulas not updating

In this update, formulas now update when entering details via a workflow questionnaire.



IF Date Formulas

The result of formula IFDATETEST now functions as expected.

Error with Packages

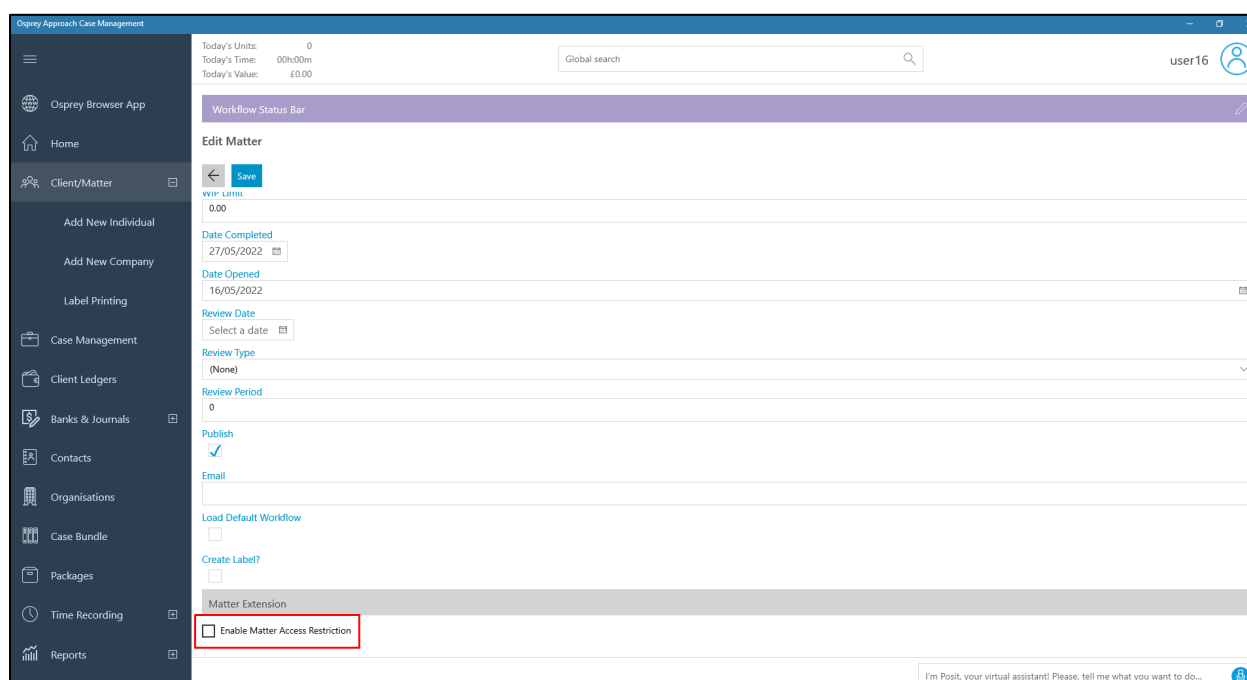
Previously, there was potential for unexpected errors when trying to click into a package.

In this update, a fix has been applied.

Matter Restriction Switch

Previously, newly added users were automatically restricted from certain files.

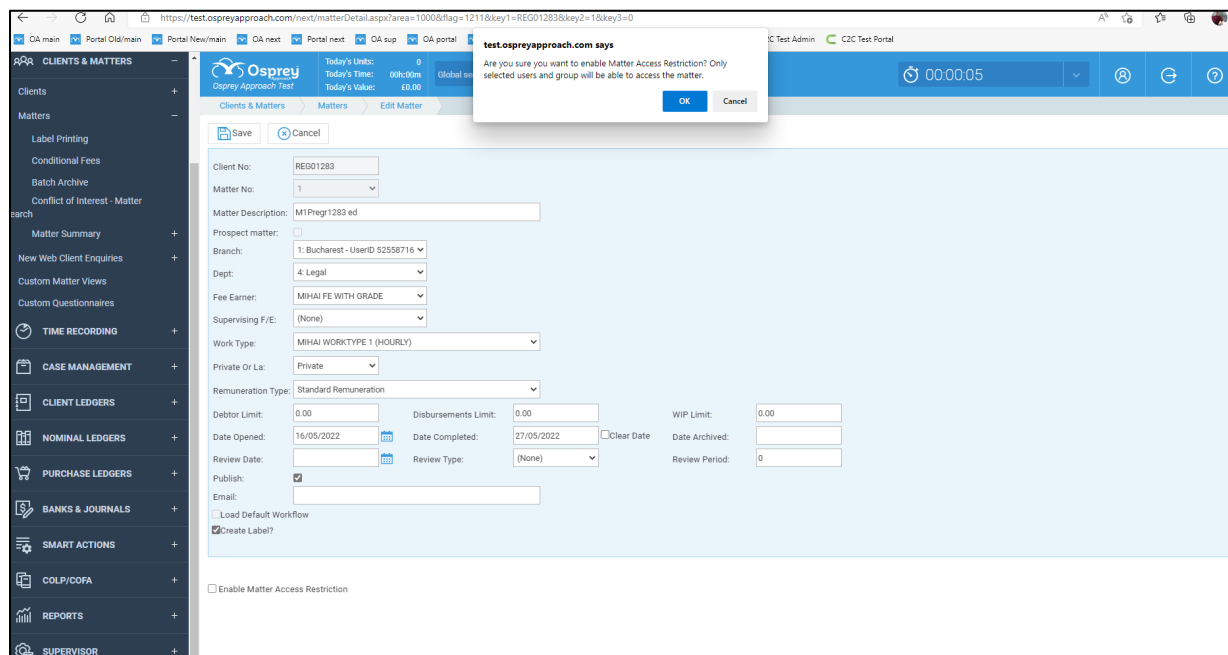
In this update, there is a new switch located in Client/Matter > Edit Matter.



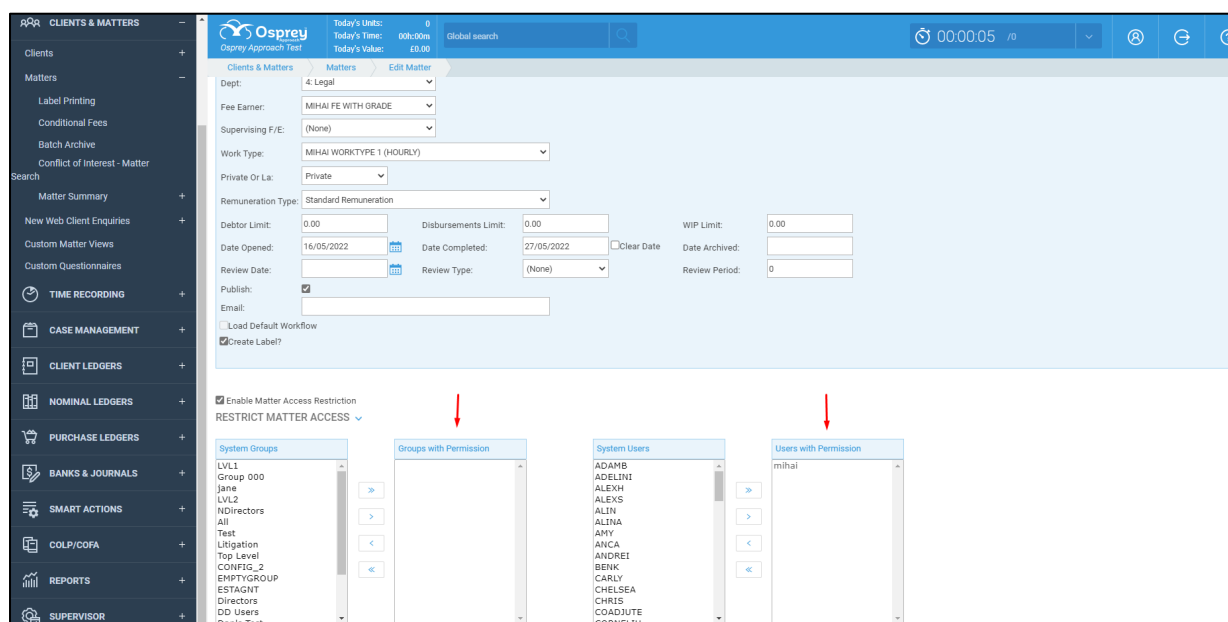
The screenshot shows the 'Edit Matter' form in the Osprey Approach Case Management web browser app. The form is titled 'Edit Matter' and has a 'Save' button. It contains several fields: 'Date Completed' (27/05/2022), 'Date Opened' (16/05/2022), 'Review Date' (Select a date), 'Review Type' ((None)), 'Review Period' (0), 'Publish' (checked), 'Email', 'Load Default Workflow' (unchecked), 'Create Label?' (unchecked), and a new 'Matter Extension' section. The 'Matter Extension' section contains a checkbox labeled 'Enable Matter Access Restriction', which is currently unchecked and highlighted with a red box. The sidebar on the left shows the navigation menu with 'Client/Matter' selected. The top bar shows 'Today's Units: 0', 'Today's Time: 00h:00m', 'Today's Value: £0.00', a 'Global search' bar, and the user 'user16'.

The checkbox is unticked by default. If the matter is saved with this unticked, no restrictions are applied. Newly added users are no longer restricted to matters that had previously been edited.

After this checkbox has been ticked, the user will be met with a confirmation to confirm and select 'ok'.



At this point, access can be granted to users / groups for this matter.



If this box is unticked, there would be another confirmation box.

test.ospreyapproach.com says
Are you sure you want to disable Matter Access Restriction? All users will be able to access the matter.

OK Cancel

Osprey Approach Test

Today's Value: 8
Today's Time: 00h:00m
Today's Value: £0.00

Global Settings

00:00:05 / 0

Client No: REG01283

Matter No: 2

Matter Description: MZLAreg1283 ed

Prospect matter: ☐

Branch: 1: Bucharest - UserID 52558716

Dept: 1: Civil Department

Fee Earning: MIHAI FE WITH GRADE

Supervising F/E: (None)

Work Type: MIHAI WORKTYPE 1 (HOURLY)

Private Or La: Private

Remuneration Type: Standard Remuneration

Debtor Limit: 0.00 Disbursements Limit: 0.00 WIP Limit: 0.00

Date Opened: 16/05/2022 Date Completed: Date Archived:

Review Date: 31/05/2022 Review Type: (None) Review Period: 0

Publish: ☒

Email:

☐ Load Default Workflow

☒ Create Label?

☒ Enable Matter Access Restriction

RESTRICT MATTER ACCESS

System Groups Groups with Permission System Users Users with Permission

The Matter Restriction Audit for Osprey Approach Browser version (Reports > Miscellaneous Reports), records enabling and disabling matter restrictions.