



Release Notes

Update: v1.29.0

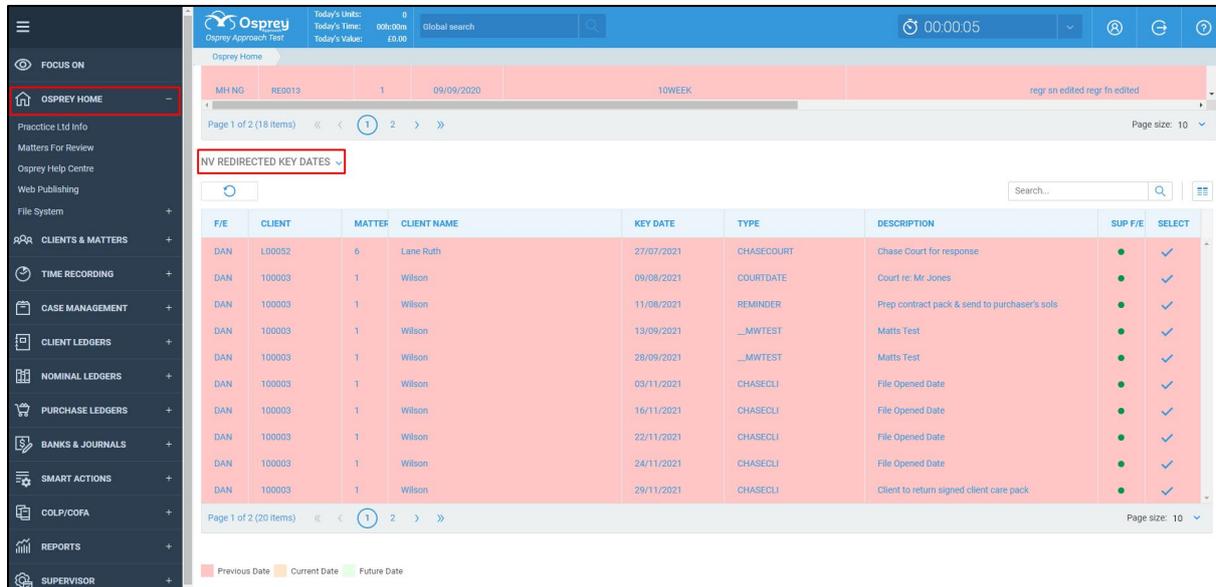
Web Browser

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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.



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.

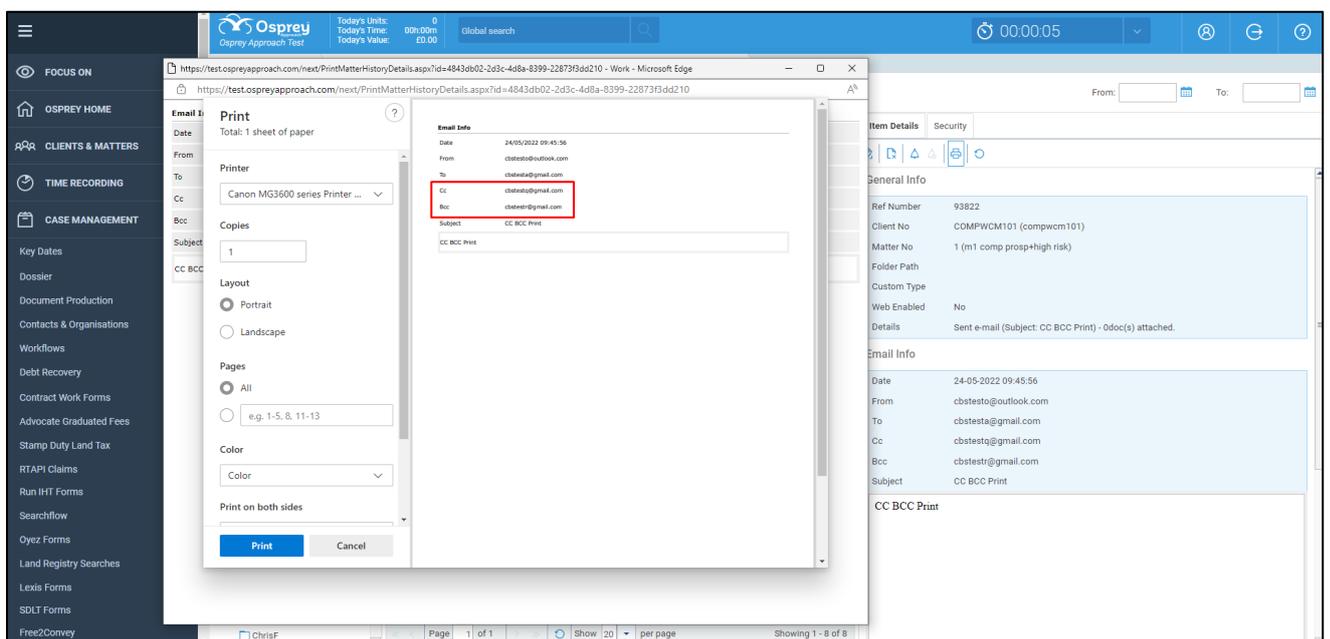
In this update, users can scroll as expected.

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

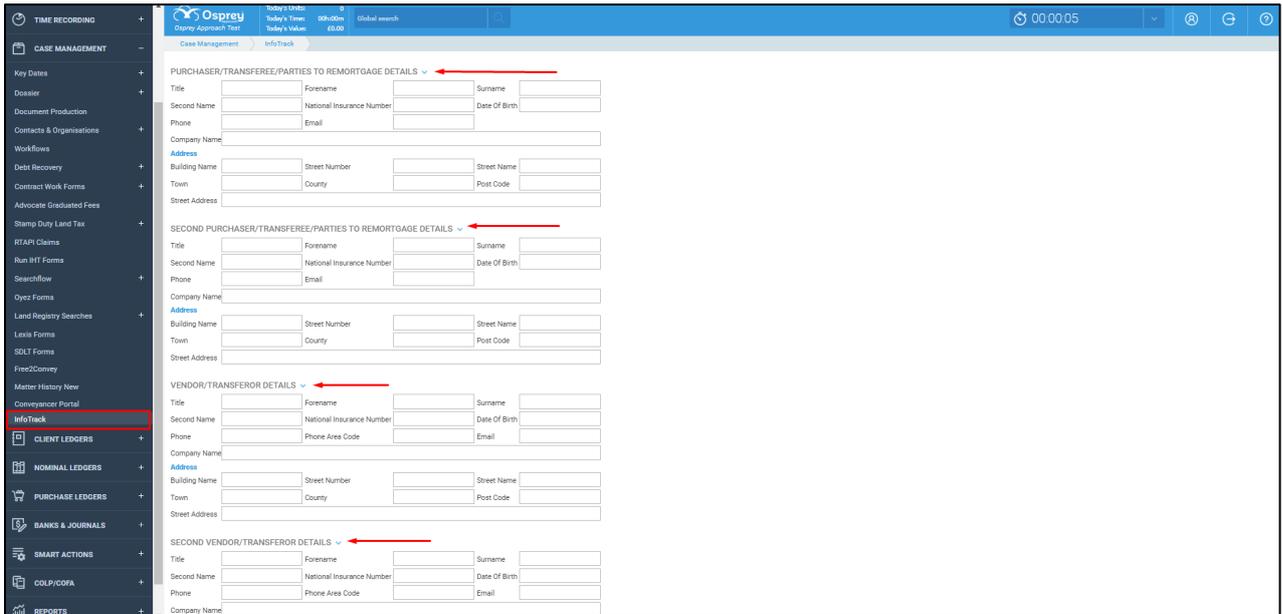
Previously, when printing emails, the CC / BCC fields would not show. In this update, they display as expected.



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.

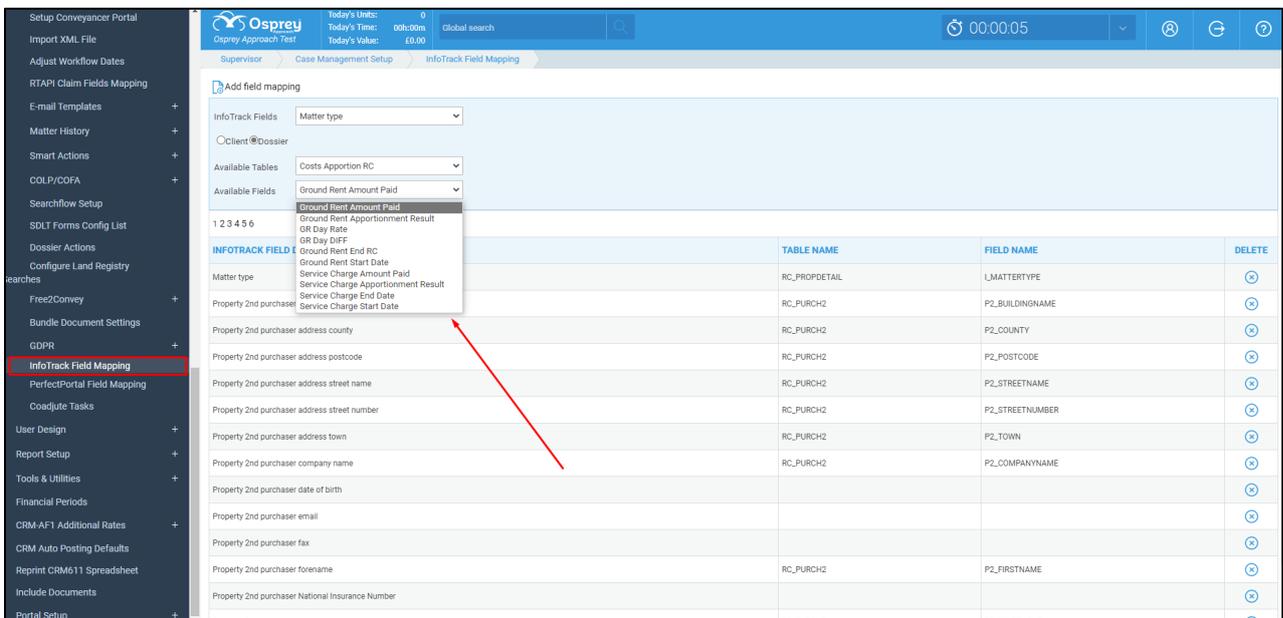
In this update, the labels have been updated.



InfoTrack Formula Mapping

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

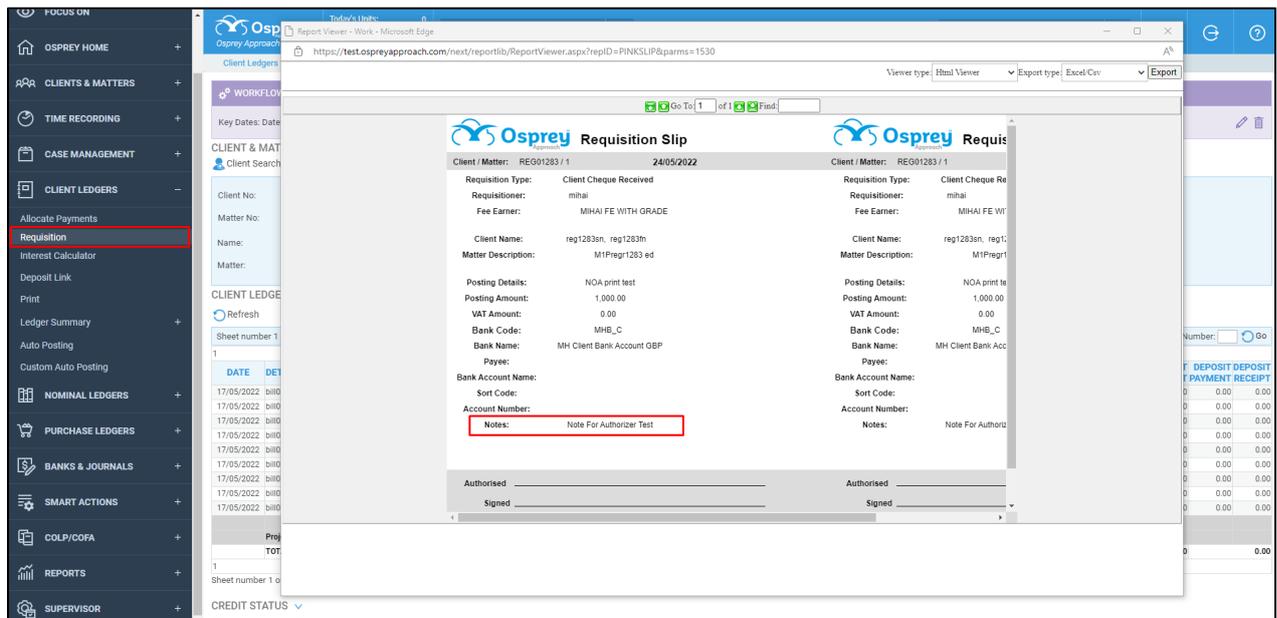
In this update, formula dossier InfoTrack fields can now be mapped.



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.

CLIENT & MATTER SEARCH

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

ALLOCATE DISBURSEMENTS TO BILL

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

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	FUD001	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 UnpDisb03	2288	-3,000.00	3,000.00	09/05/2022	UnpDisb03	FUD3	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.

CLIENT & MATTER SEARCH

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

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

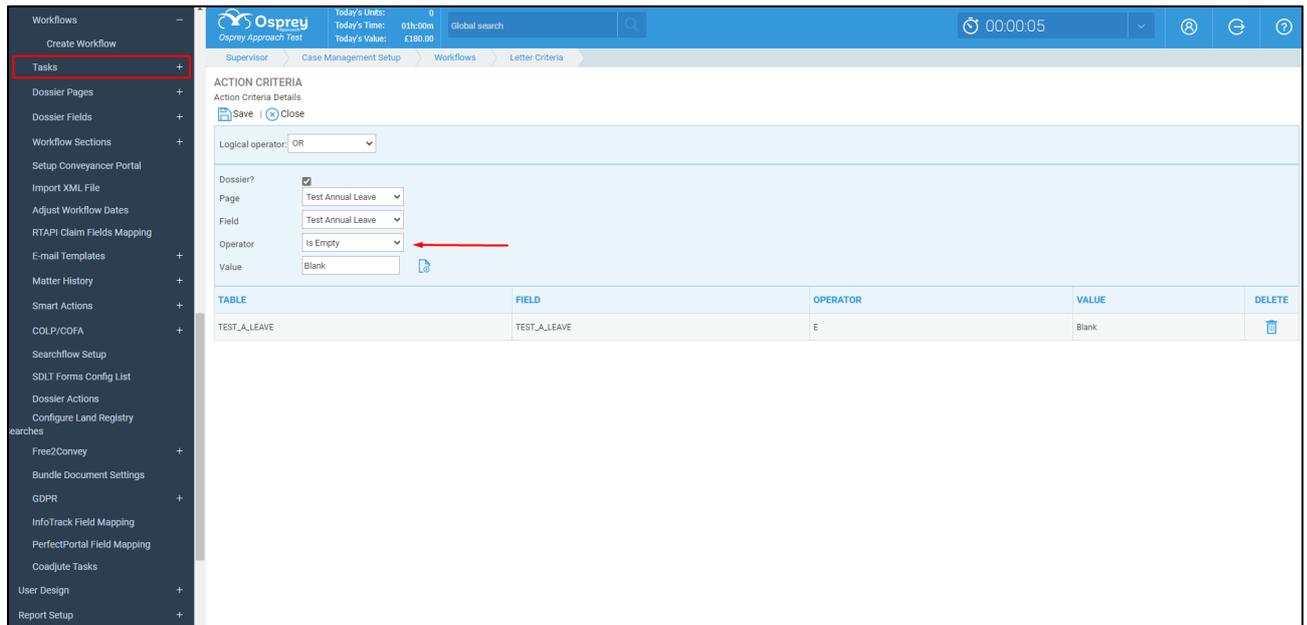
Billing Guide - Unbilled Disbursements on Ledger

Date	Detail	Reference	Vat	Disbursement
Total Unbilled Disbursements Excluding VAT:				0.00

Date Field criteria if empty

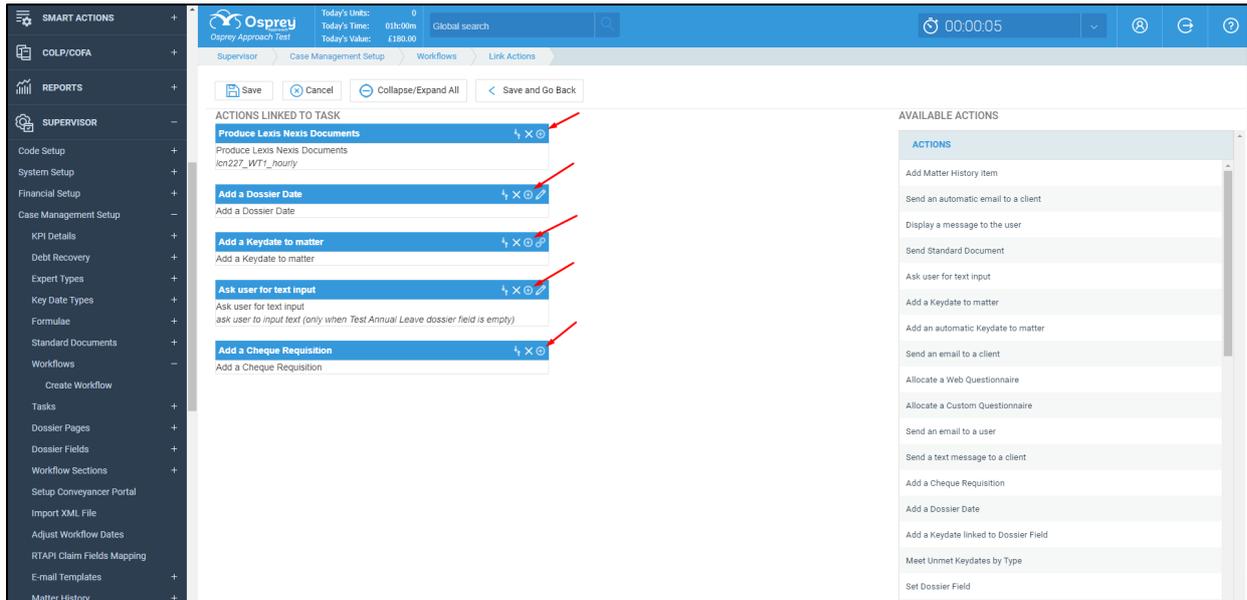
Previously, if the criteria of a workflow task (that is set against a date field) is blank, the action still performs.

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.



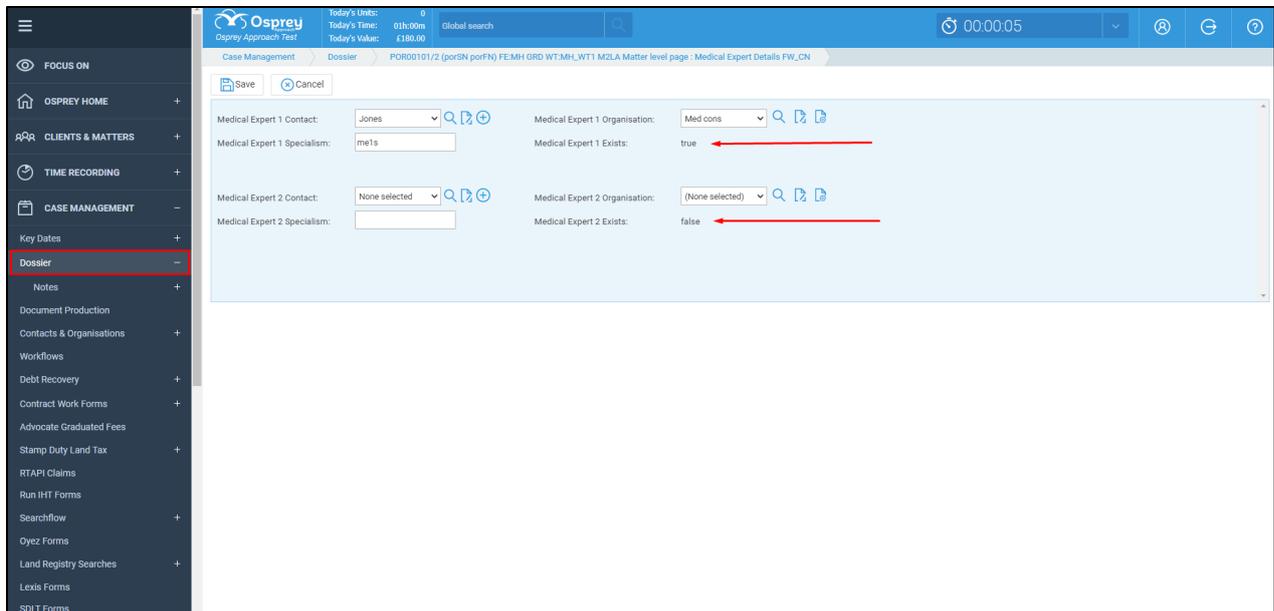
Criteria against more tasks

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

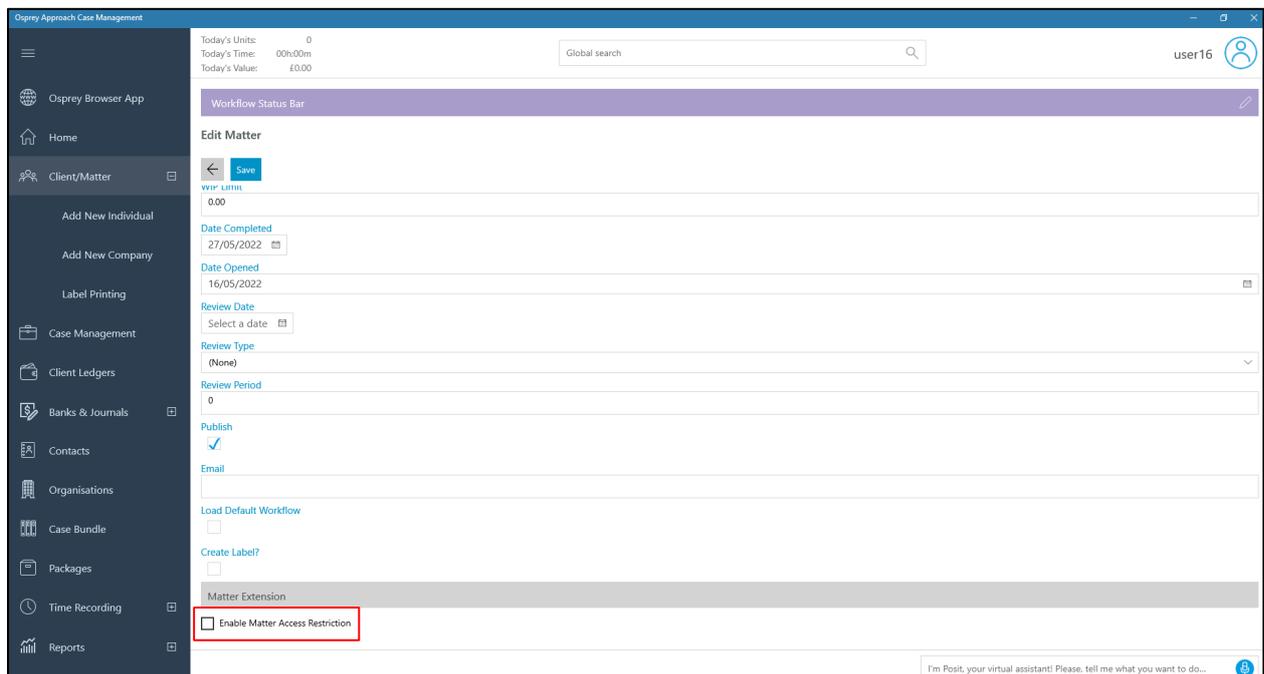
Previously, there was potential for unexpected errors when trying to click into a package.

In this update, a fix has been applied.

Matter Restriction Switch

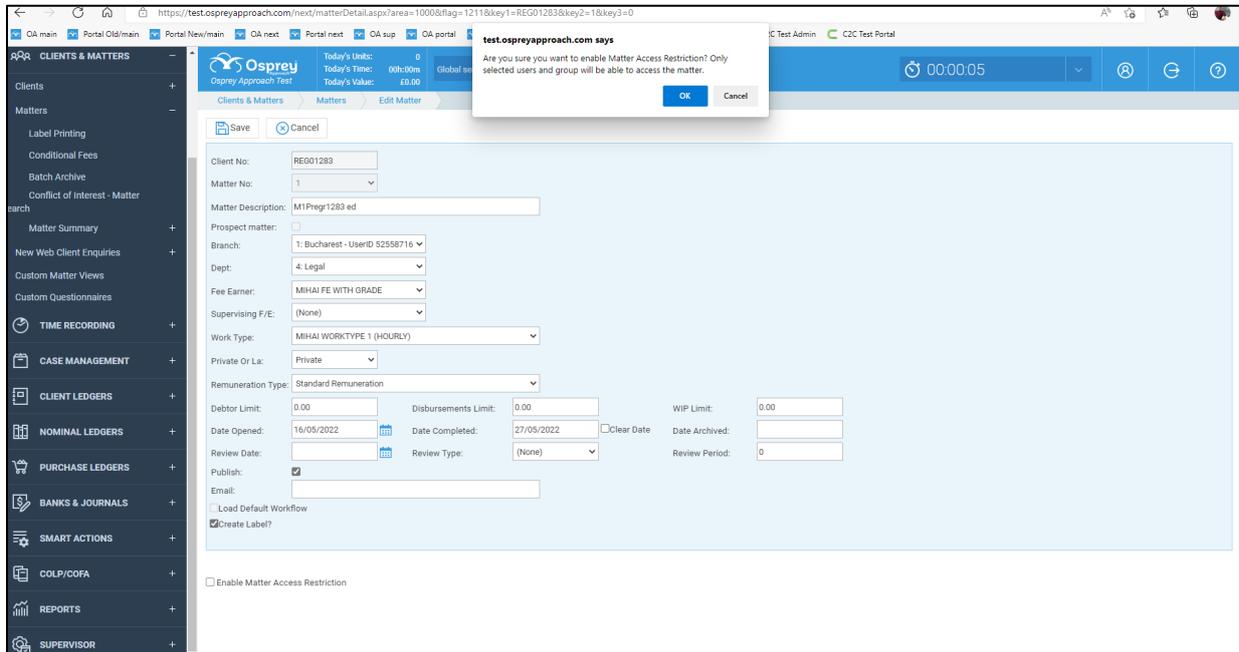
Previously, newly added users were automatically restricted from certain files.

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

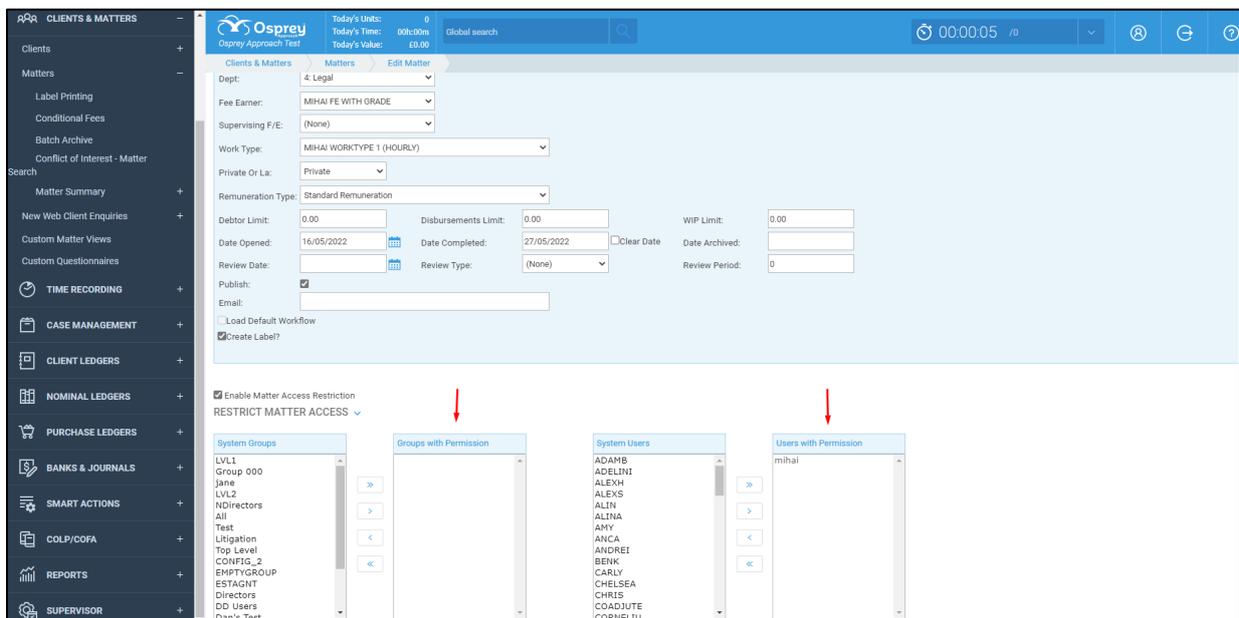


The checkbox is unticked by default. If the matter is saved with this unticked, no restrictions are applied. Newly added users are no longer restricted to matters that had previously been edited.

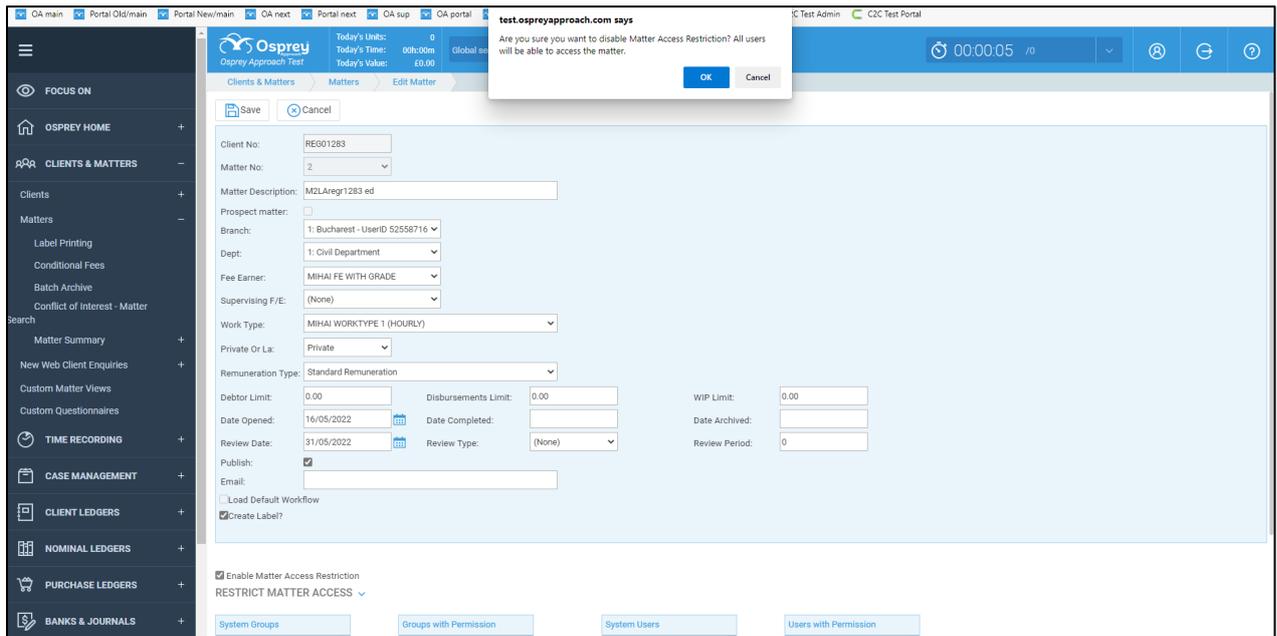
After this checkbox has been ticked, the user will be met with a confirmation to confirm and select 'ok'.



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



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



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