Release Notes

Update: v1.29.0
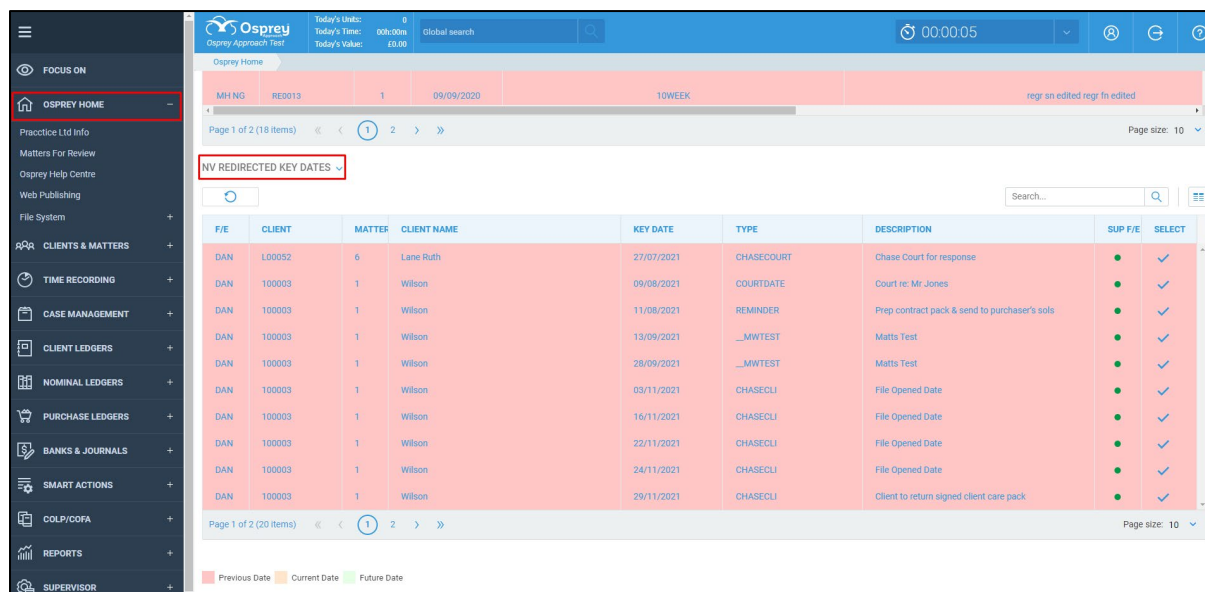
Web Browser

Contents

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.
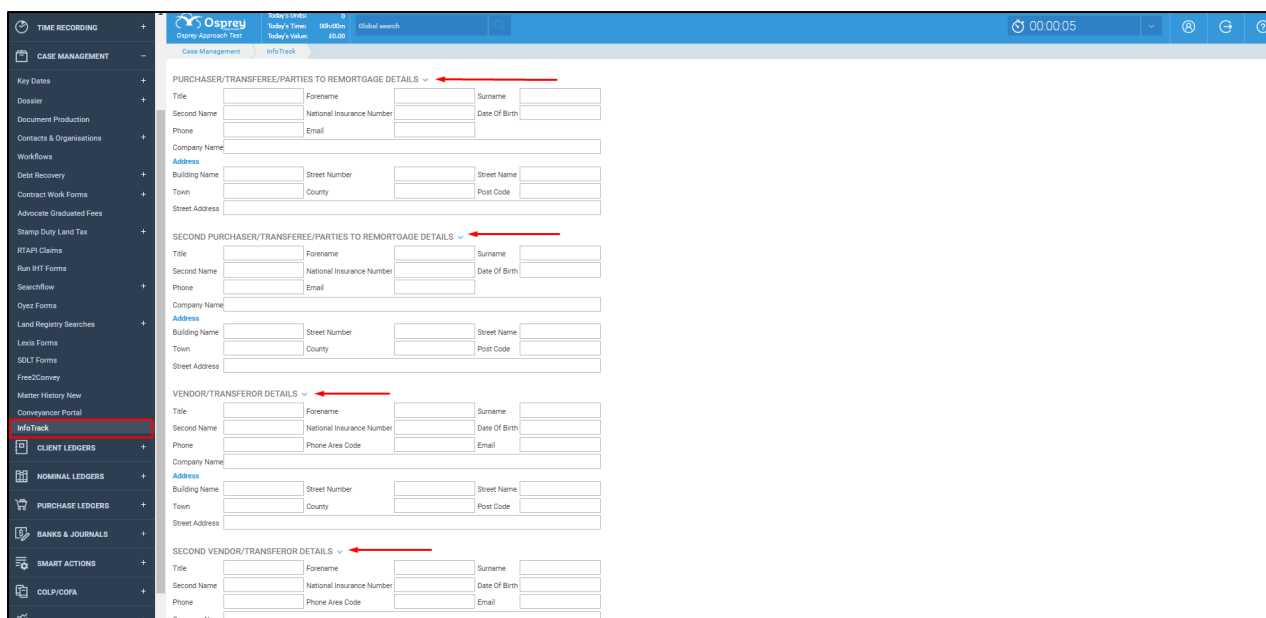
Email CC / BCC Fields

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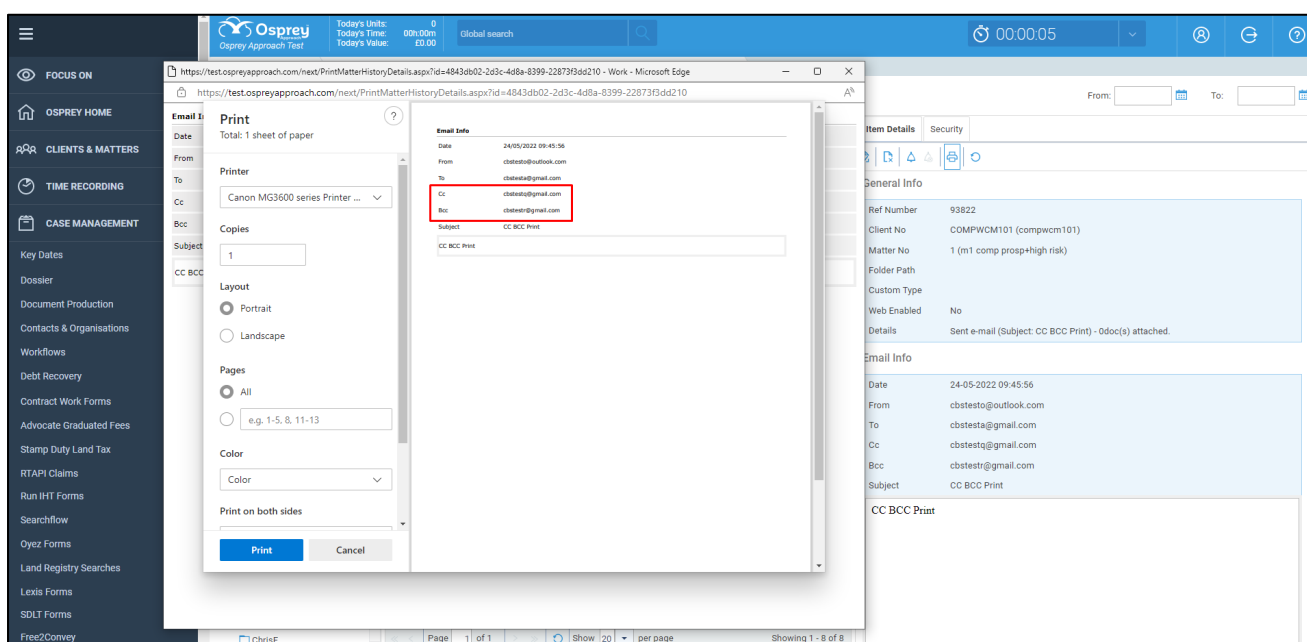
InfoTrack labels

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.
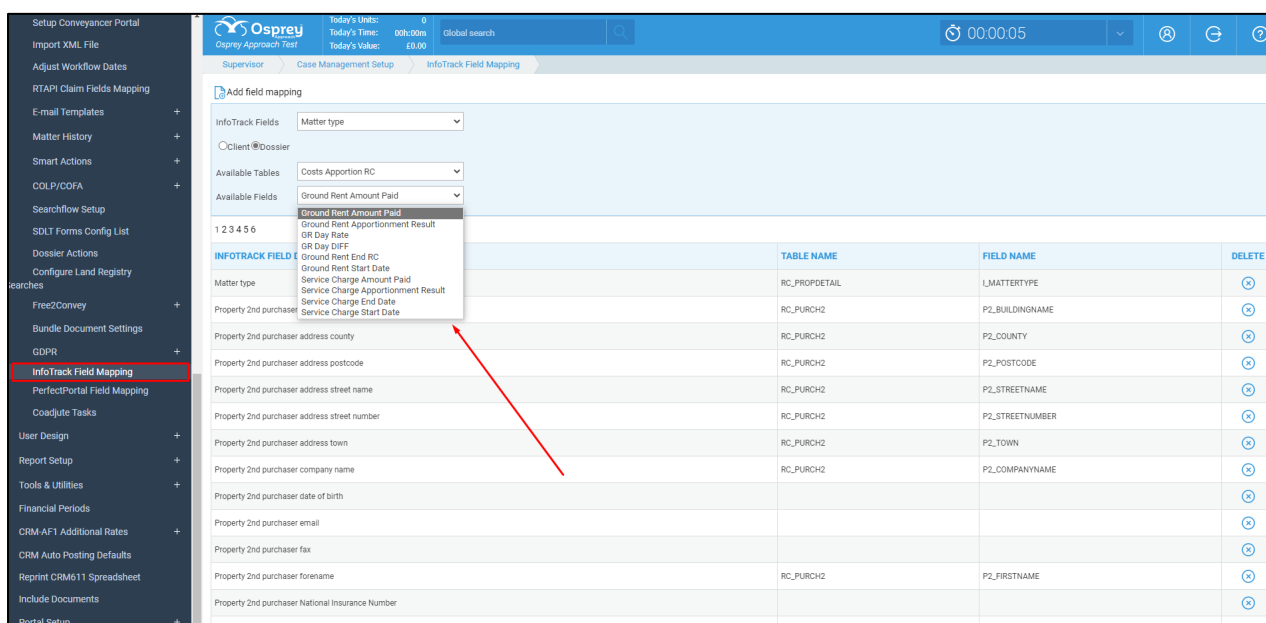
In this update, the labels have been updated.

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.
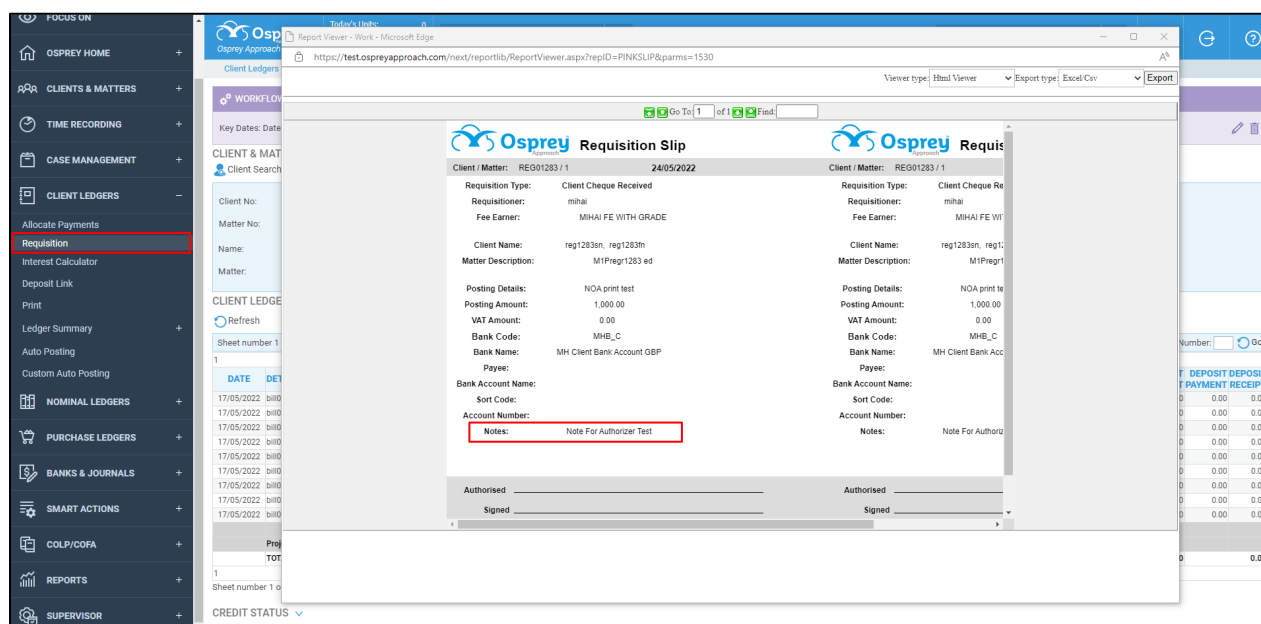
Requisition Slip

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.
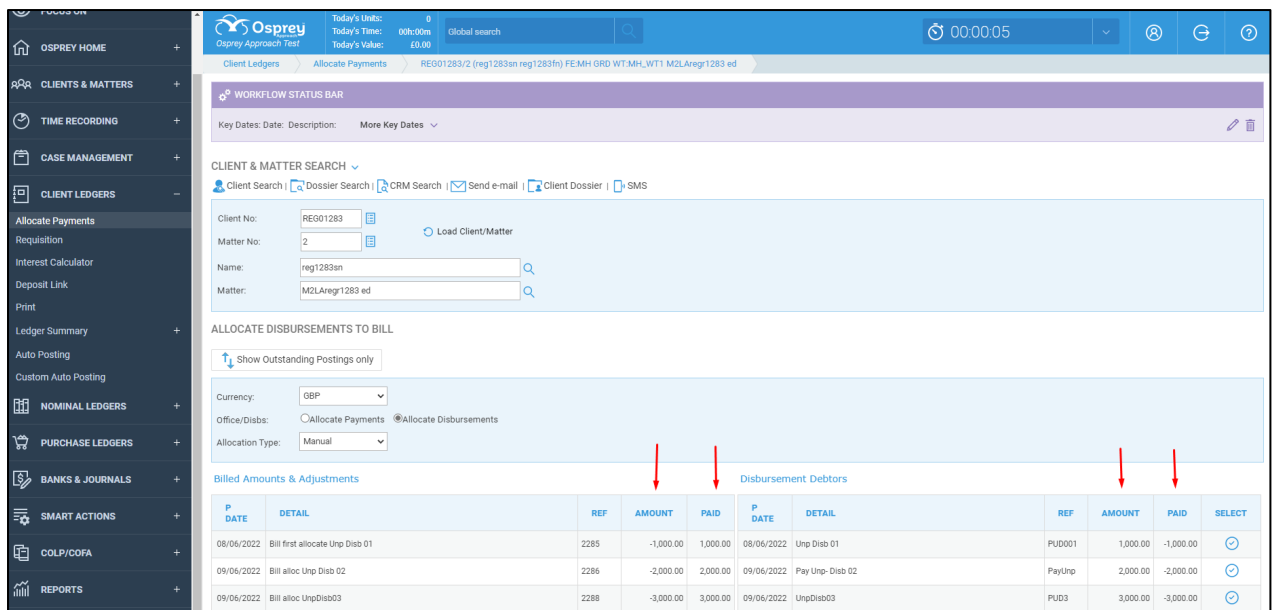

Unpaid Disbursement

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.

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.

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.
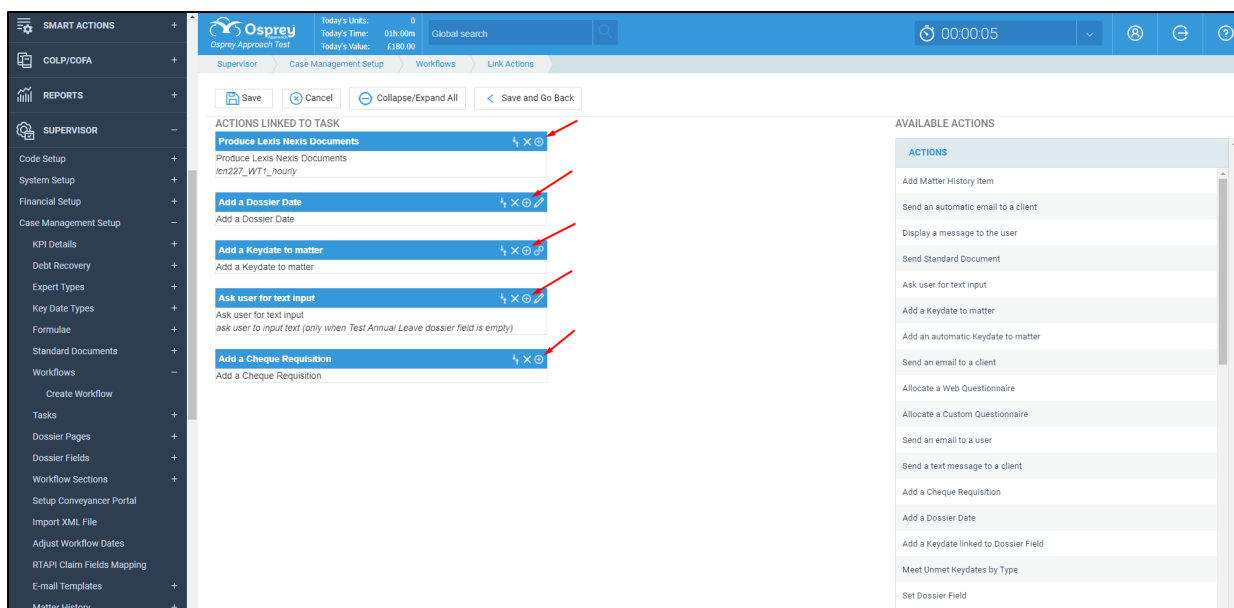

Criteria against more tasks

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.
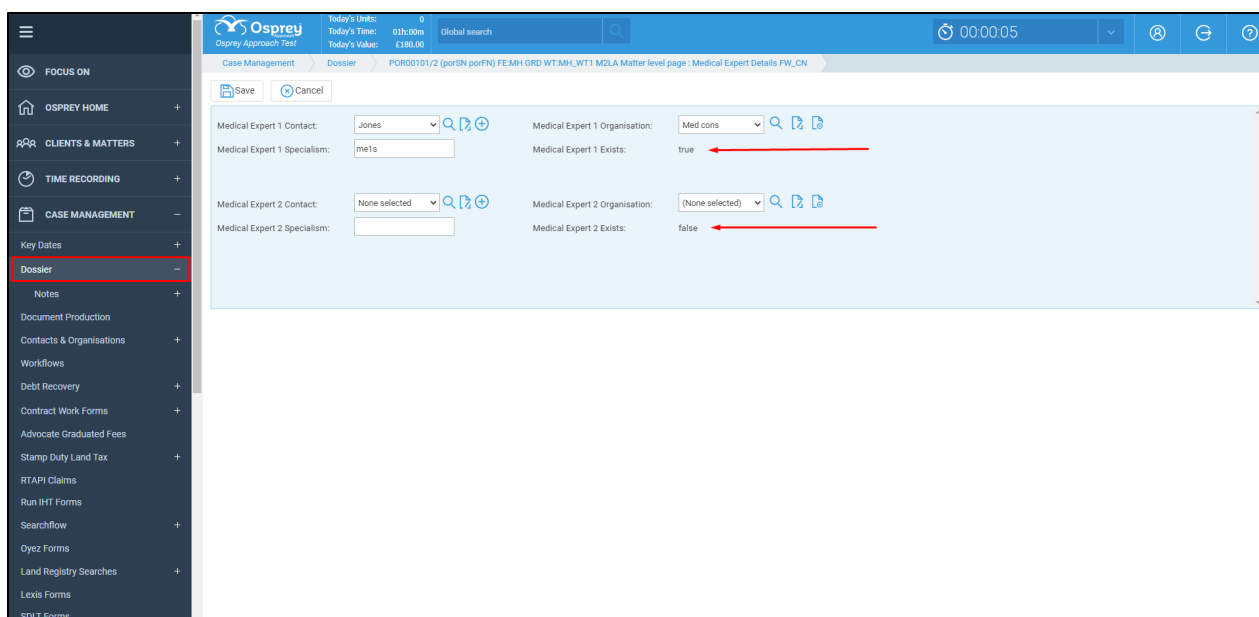
IF Date Formulas

The result of formula IFDATETEST now functions as expected.
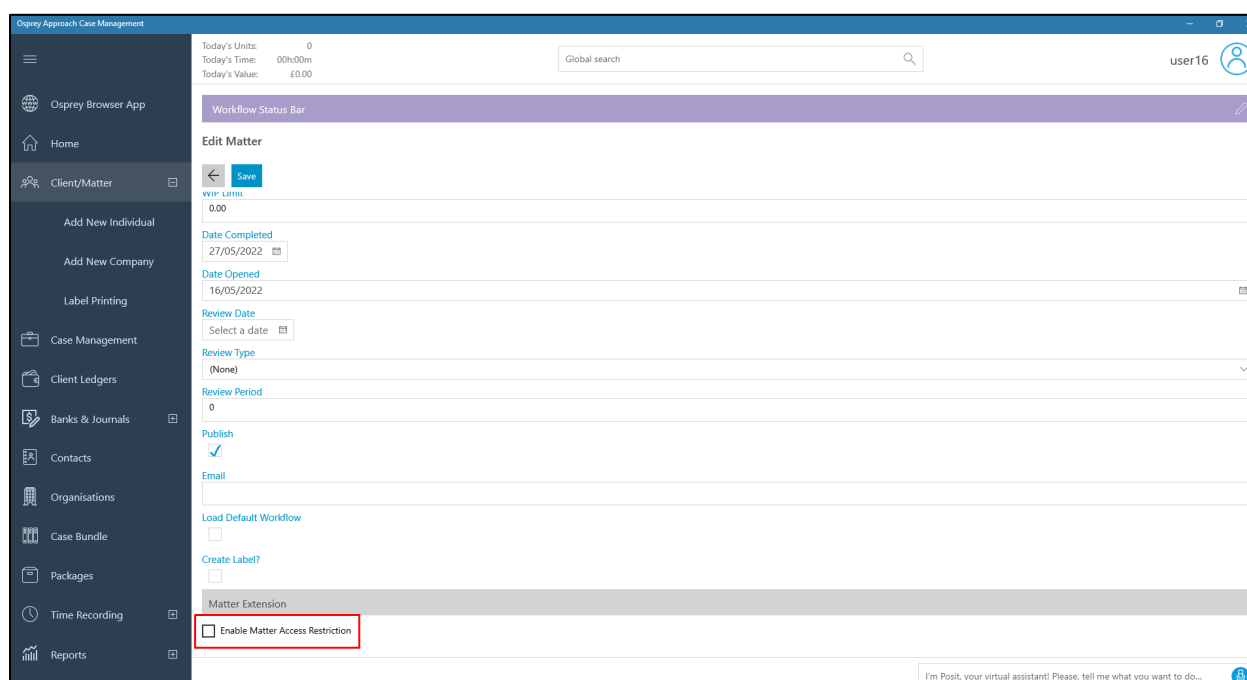
Error with Packages

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

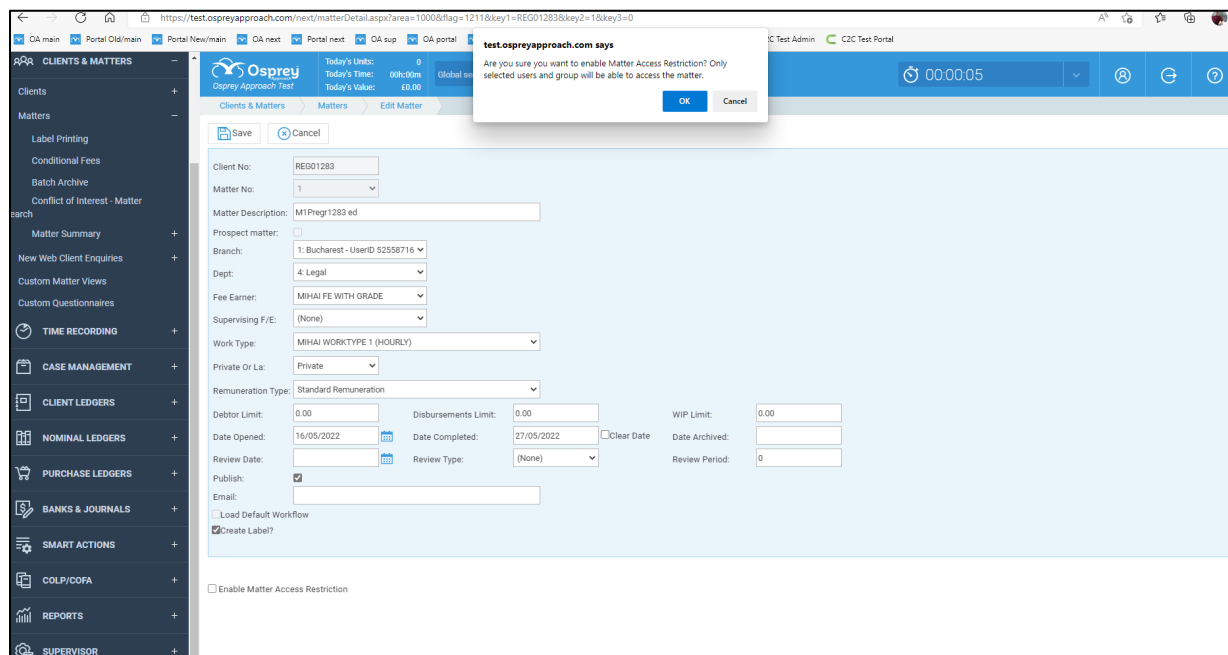Previously, newly added users were automatically restricted from certain files.

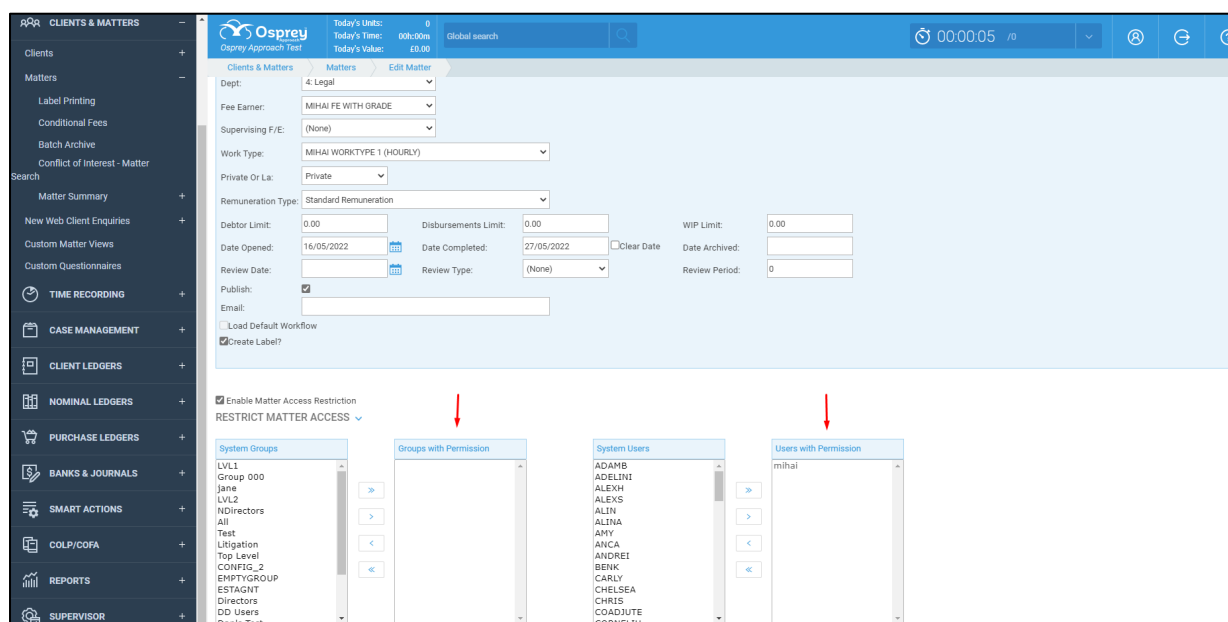In this update, there is a new switch located in Client/Matter > Edit Matter.

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.