# Osprey Approach: Access Template Breakdown

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The latest version is always online at
https://support.ospreyapproach.com/?p=820

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The following list will guide you through the options available in your access templates.

Home

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| **Groupware** | No Longer Used |
| **Pracctice Ltd Info** | No Longer Used |
| **Matters For Review** | Allows the user to see Matters For Review on the Homepage |
| - Matters for review Search | Allows users to search in the Matters for Review list |
| - Matters for review search results | Allows users to see the search results |
| **Osprey Help** | Allows the user to access the help files |
| **Support Area** | Navigates to the Osprey Website. |
| - Log Call | No Longer Used |
| - Manuals | No Longer Used |
| **Web Publishing** | Links to the user firms Web Portal site (If applicable) |
| **File System** | |
| -General Files | Non client related documents can be accessed here |
| - General File History | |

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Clients & Matters

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| **Clients** | Allows the user to access the client area within Osprey. |
| - Client Views | No Longer Used |
| -New Individual File | Allows users to create a new individual client |
| - Contact Client | No Longer Used |
| - New Company Client | Allows users to create a new company client |
| - Designations | No Longer Used |
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| **Web Publishing** | |
| Enable Access | Allows the user to Web Enable a client (if Web Portal is used) |
| Banners/Messages | No Longer Used |
| Print Details | No Longer Used |
| Link Associates | Allow the user to link associates to client matters (if using Web Portal) |
| Print Details | No Longer Used |

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| **Conflict Of Interest** | Allows the user to perform a Conflict of Interest Search. |
| Conf of Int - Cli Search | Allows the user to perform a Conflict of Interest Client Search. |
| Conf of Int - Print | Allows the user to print the conflict of interest Results |
| **Additional Details** | Allows the user to view the Additional Client Details Area |
| - Add Details | Allows the user to add/amend details in the additional details area. |
| - Edit Details | Allows the user to edit the details in the Additional Details Area. |
| - Delete Details | Allows the user to access the details and delete them if no longer needed. |
| New Conv File | Allows the user to access the New Conveyancing File screen which is linked to our free2convey site. |
| New Conv Matter Step 1 | Allows the user to access the relevant details for the new Free2Convey matters. |
| New Conv Matter Step 2 | Allows the user to access the relevant details for the new Free2Convey matters. |
| Call Report | No Longer Used |
| Call ML | Allows the user to perform a money laundering check (Account permitting) |
| **GDPR** | Allows users to see options for GDPR |
| - Erasure Requests | Allows users with permissions to enter Erasure Requests |
| - Erasure Request Approval | Allows Approval user to Approve the Erasure Request |
| - Data Request | Allows users to request full Data as file to send to 3rd party |
| - Data Request Approval | Allows Approval user to Approve the Data Request. |
| **Matters** | Allows the user to access the matters area within Osprey. |
| Add Matter | Allows the user to add a matter to the user currently selected client. |
| Edit Matter | Allows the user to edit the cli/matter selected. |
| Unique File Number | Allows the user to generate a UFN (Legal Aid only) |
| Archive/Restore | Allows the user to archive or restore the matter selected. |
| **Designations** | No Longer Used |
| Label Printing | Allows the user to print labels for selected Matters (Pending on set up of labels) |
| Conditional Fees | No Longer Used |
| Batch Archive | Allows the user to archive multiple zero balance files on the system. |

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| Print Details | Allows the user to print the matter details within the system. |
| Conf of Int - Matt Search | Allows the user to complete a Conflict Matter Search. |
| Searches | Allows the user to access the searches below. |
| - Search Matters | Allows the user to complete a Matter Search. |
| - Search Dossier | Allows the user to complete a Dossier Search. |
| - Last Matters Accessed | Allows the user to access the last 10 matters accessed. |
| - Search Cli & Matters | Allows the user to access the Client & Matter Searches. |
| - Search CRM | Allows access to the CRM Search area (searching contract work form areas (LA only)) |
| Matter Summary | Allows access to the Matter Summary area along with Credit Limit Warning & Printing options. |
| Go Live | Allows the user to mark a prospect matter as a live matter |
| Conflict of Interest | Allows the user to complete a conflict of interest searches. |

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| **New Web Client Enquiries** | |
| View Questionnaires for Review | Allows the user to access the custom questionnaires for review. (submitted via Web Portal) |
| Edit Questionnaire for Review | Allows the user to edit the custom questionnaires which may need to be reviewed. (submitted via Web Portal) |
| Post Questionnaires for Review | Allows the user to post the details held in questionnaires (submitted via Web Portal) |
| Caseworker Questionnairs | Allows the user to access Caseworker Questionnaires |
| Custom Matter Views | Allows the user to access any created Custom Matter Views a collation of client information. |
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| Custom Questionnaires | Allows the user to create custom questionnaires |

Time Recording

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| Credit Warning | Allows the user to access the credit limit warnings so they can see what credit limits are on the user cli/matter. |
| Transfer Time | Allows the user to transfer time between matters |

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| - Transerred Time | List of time that has been transferred on a matter |
| - Print From | Date parameter for Transferred time |
| - Print To | Date parameter for Transferred time |
| Fee Earner Summary | Settings for Time recording |
| - post time entry | Allows the user to post time to a ledger |
| - undo posting | Allows the user to undo time posting |
| - Attendance Note | Allows the user to add attendance notes |
| - Add Att. Note | Allows the user to add attendance notes |
| - Edit Att. Note | Allows the user to edit attendance notes |
| - Delete Att. Note | Allows the user to delete attendance notes |
| - Fee Earner Summary | Allows the user to view the fee earner summary |
| **Time Billing** | Allows users to see time billing options |
| - Create Bill Template | Allows the user to create a new bill template |
| - Print Bills | Allows the user to print bills that have been spooled for printing |
| - View billed time | Allows the user to view billed time on the matter |
| - View billed time Report | Allows the user to run the report for billed time |
| - Billing Guide | Allows the user to view and print the billing guide. |
| Prospect time recording | Allows the user to view time recorded on a prospect matter |
| Tick Billed Time | Allows the user to tick time previously billed |
| - Time Allocation | Allows the user to allocate time to a bill |
| Mark up | Allows the user to mark up time selected |
| - View Mark up time | Allows the user to view all time marked up on the matter |
| Write off | Allows the user to write of time selected |
| - view time | Allows the user to view time written off |
| Print | Print Runnning Record of Costs Report |
| Time sheets | Allows the user access to view timesheets (Pending time postings) |
| New Timesheet | Allows a user to create a new timesheet. |
| Edit Timesheet | Allows a user to edit a timesheet. |
| Delete Timesheet | Allows a user to delete a timesheet they have created |
| Update Timesheet | Allows the user to update a timesheet |
| Rejected Entries | No Longer Used |
| Summary | No Longer Used |
| Print Time sheet | Allows the user to print the timesheet prior to submission. |
| Multiple Timers | This allows the user access and view multiple timers |

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| Add Timer | Allows the user to add a timer against the client/matter selected. |
| Edit Timer | Allows the user to edit the timer the user have selected on the system. |
| Delete Timer | Allows the user to delete a timer that the user has already added onto Osprey. |
| Pause/Resume Timer | Allows the user to pause/resume any time added to a timer |
| Post Timer | Allows the user to post the time recorded against the timer using the standard posting screen. |
| Phase Limits | |

Case Management

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| **Key Dates** | Allows the user to view the Key Dates area. |
| - Add Key Date | Allows the user to add a key date within the system linked to client/matter. |
| - Edit Key Date | Allows the user to edit/amend any key dates on the system |
| - Delete Key Date | Allows the user to delete the keydate from the system once it has been reviewed. |
| - Key Date Summary | Allows the user to run a report which shows the key dates against any fee earner in the system, so the user can see which ones are coming up. |
| - Print Key dates | Allows the user to print the key dates on a matter |
| **Dossier** | Allows the user to access the dossier pages linked to the worktypes for the user client/matter selected, so the user can enter any relevant data to the pages. |
| - Edit Page | Allows the user to edit and view details held in the Dossier. |
| - View Details | Allows the user to view the details within the dossier pages. |
| - Notes | Allows the user to add notes against the dossier page lists linked to the matter. |
| - Add Note | Allows the user to add a note within the system, so that the user can see it against the dossier pages. |
| - Edit Note | Allows the user edit previous notes the user have entered onto the system. |
| - Delete Note | Allows the user to delete a note against the dossier pages area. |
| - Print Note | Allows the user to print the details of the notes within the system. |
| - Document Production | This area allows the users to run standard documents from any templates created within the Supervisor Area. |
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| **Standard Documents** | Allows the user to access the standard documents to run them against the client/matter the user have selected. |
| - Print Email | Allows the user print sent emails. |
| - Client Reports | No Longer in Use |
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| **Contacts & Organisations** | This allows the user to access the contacts and organisations area which acts as an address book within the system. |
| - Contact Manager | Allows the user to access the contact manager functions below. |

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| - Add Contact | Allows the user to add a contact onto the system and link it to an organisation if required. |
| - Edit Contact | Allows the user to edit/amend a contact in the system and link it to an organisation. |
| - Delete Contact | Allows the user to delete a contact from the system. |
| - View Contact | Allows the user to view the contact on the system. |
| - Add/Edit Contact | Allows the user to add/edit the contact within the system. |
| - Organisation Manager | Allows the user to access the Organisations the contacts will be linked to. |
| - Add Organisation | Allows the user to add an organisation to the system. |
| - Edit Organisation | Allows the user to edit a created organisation. |
| - Delete Organisation | Allows the user to delete an organisation from the system and unlink the contacts. |
| - View Organisation | Allows the user to view an organisation and the contact details on the system. |
| - Organisation Link | Allows the user to show which users are linked to the organisations. |
| - Print Organisation | Allows the user to print the organisation from the system |
| - Add/Edit Organisation | Allows the user to add/edit organisations on the system. |
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| **Workflows** | Allows the user to access the workflows area of the system and see which workflow/s have been run on the system. |
| - Remove Workflows | Allows the user to remove the workflows from the system. |
| - Edit | No Longer Used |
| - Advanced | Allows the user to access the advanced areas of the workflows, so the user can show Workflow edited status and also load a workflow within a workflow |
| - Delete Tasks | Allows the user to delete tasks from Workflows (dependant on permission) |
| - Undo Tasks | Allows the user to undo if run in error |
| - Load | Allows the user to load a workflow onto a clients matter |
| - View Workflow | Allows the user to view the workflow within the system before loading it. |
| - Run | Allows the user to run a workflow task |
| - Get User Email | Accesses the client email for the purpose of email actions. |
| - Workflow Status Bar | enables the view of the workflow status bar. |
| - Debt Recovery | Allows the user to access the debt recovery options within the system, as well as the debt summary. |
| - Debt Ledger, | Allows the user view the debt ledger for debt recovery. |
| - Debt Ledger Print | Allows the user to print the ledger on the system. |
| - Post | Allows the user to post to the ledger. |
| **Contract Work Forms** | Allows the user to access dossier pages specific to legal aid/Civil Billing |
| **Edit Form Data** | Allows the user to amend details held in the dossiers. |
| **Manage Lists** | Enables the user to amend lists available in the Dossiers. |
| **CRM List Defaults** | Allows the user to view list defaults relating to the above. |
| **Advocate Grad Fees** | Allows the user to view details relating to legal aid matters. |
| **AF1 Print** | Allows the user to print the AF1. |

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| **Stamp Duty Land Tax** | Enables the user to submit an SDLT form. (via sdlt.co.uk, account permitting.) |
| - Edit Form Mapping | Allows the user to map data to the SDLT form as above. |
| **RTAPI Claims** | Allows the user to submit RTAPI claims. |
| **Run IHT Forms** | Allows the user to print the IHT forms. |
| **Searchflows** | Allows the user to view available searches and submissions |
| - S'flow Submit Search | Allows the user submit searches. |
| - S'flow View Message | Allows the user to view correspondence from search flow. |
| **Oyez Forms** | Allows access to Oyez Forms (dependant on set up) |
| **Land Reg Searches** | Allows the user to search land registry searches and e-document reg searches. |
| - e-Document | Registration Searches Related to above. |
| **SDLT Forms** | Allows the user to Submit SDLT forms directly to the government site. |
| - SDLT Submit XML | As Above. |
| - SDLT View Response | Allows the user to view the successful submissions. |
| **Free2Convey** | Allows a user to link to the Free2Concvey site (dependant on user account) |
| - Add/Join Chain | Allows the user to add or join a Chain through Free2Convey. |
| - Chain Invitation | Allows the user to invite a user to a chain for Conveyancing. |
| - Free2Convey Error | Allows the user to know if there are any errors with anything linked from Free2Convey. |
| - Matter History New | Allows the user to access a client's matter history |
| - Conveyancer Portal | This is used for XIT2 users only. |
| Info Track | Allows users to use the Info Track integration |
| - Info Track Order Details | Allows the user to veiw Info Track Orders |

Email Client

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| - Email Client | Allows a user access to any of their linked email accounts. Emails can be sent and received through any account and can also be linked to clients matters. Contact support@pracctice.net if the user is interested in a demo on this. |

Client Ledgers

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| **Post Client Receipt** | This will show money Going into the Client Bank |
| **Post Client Payment** | This will show money going out of the client bank. |
| **Cost Transfer** | Client to Office/Disbs allows the user to do a cost transfer from client to office. |
| **Cost Transfer** | Office/Disbs to client allows the user to do a cost transfer from office to client. |
| **Post Office Payment** | This will show money going out of the office bank. |
| **Post Office Receipt** | This will show money going into the office bank. |
| **Post Petty Cash Rec** | This will show money going into the Petty Cash. |
| **Post Petty Cash Pay** | This will show money going out of the Petty Cash |
| **Post Unpaid Disbs** | This will allow the user to post an unpaid disbursement. |

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| **Post Bill** | This will allow the user to post a bill to the ledger to show that client has been billed. |
| **Post Credit Note** | This will allow the user to post a credit note to the ledger. |
| **Post Provisional Bills** | This will allow the user to post a provisional bill. |
| **Cancel Provisional Bill** | This will allow the user to cancel a provisional bill. |
| **Enter Counsel's Fees** | This will allow the user to enter Counsel Fees into the Ledger ready for billing. |
| **Post Deposit Receipt** | This will show money that the client has paid in advance. |
| **Post Dep Withdrawal** | This will show the user taking money out of the deposit account to pay bills. |
| **Write Off Debit** | This allows the user to post a write off debit posting. |
| **Write Off Credit** | This allows the user to post a write off credit posting. |
| **Transfer to Nominal** | This allows the user to transfer money into the nominal. |
| **Transfer from Nominal** | This allows the user to transfer money from a nominal. |
| **Client Transfer** | Receipt This allows the user to do a transfer into the client account. |
| **Client Transfer** | Payment This allows the user to do a transfer out of the client account. |
| **Office Transfer** | Receipt This allows the user to do a transfer into the office account. |
| **Office Transfer** | Payment This allows the user to a transfer out of the office account. |
| **Client Tfer to Deposit** | This allows the user to do a transfer from the cli account into the deposit account. |
| **Client Tfer from Dep** | This allows the user to transfer from the client account to the deposit account. |
| **Disb to Office Transfer** | This allows the user to post a disbursement money into the office account. |
| **Office to Disb Transfer** | This allows the user to post from the office account to disbursement. |
| **Post Note** | Allows the user to post a note to the ledger. |
| **Office Cheque Rec** | Allows the user to post office cheque received and amount into the office account. |
| **Select Posting ID** | This allows the user to select a posting to make in the ledger. |
| **Post Entry** | This allows the user to access the following. |
| - Post Entry | This allows the user to post onto the client ledger. |
| - Undo Posting | This allows the user to undo a posting which has been made to the client ledger. |
| **Allocate Payments** | This allows the user to allocate payments which have been made on the banks. |
| **Requisitions** | Allows the user to have access to the requisitions area of the client ledgers. |
| - Requisition | Allows the user to view the requisitions on the system. |
| - Authorise | Allows the user to authorise the requisitions on the system. |
| - Post | Allows the user to post requisitions on the system for them to be approved. |
| **Interest Calculator** | This is for money held on a client deposit account. |
| **Interest Calc Print** | This allows the user to print the interest calculator. |
| **Deposit Link** | Allows the user to link deposit accounts. |
| - Add Deposit Account | Enables the user to link the deposited accounts. |
| **Print** | This allows the user to print the current client ledger on the system. |
| - Print Current Ledger | This falls in the above option. |
| - Print All Ledgers | No Longer Used |
| **Ledger Summary** | Allows the user to print the summary of all current client balances |
| - Credit Limit Warnings | Allows the user to access the credit limit warnings if the user have set them. |
| **Auto Posting** | Allows the user to upload to the postings to the client ledger via CSV. |
| **Custom Auto Posting** | As above however shows additional posting types. |

Nominal Ledgers

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| **Nominals** | Allows the user to access a list of nominals within the system. |
| - Nominal Header | Allows the user access to nominal header options and see a list as well as; |
| - - Nom Header Add | Allows the user to add a nominal header to the system. |
| - - Nom Header Edit | Allows the users to edit the nominal headers. |
| - - Nom Header Delete | Allows the user to delete the nominal headers on the system. |
| - Nominal List | Allows the user to view a list of nominals and SAC's on the system. |
| - Nominal SAC | Allows the user to access the SAC's on the system. |
| - - Nominal SAC | Add Allows the user to add a nominal SAC on the system. |
| - - Nominal SAC | Edit Allows the user to edit/amend a nominal SAC on the system. |
| - - Nominal SAC | Delete Allows the user to delete a nominal SAC from the system. |
| - Post Entry | Allows the user to post an entry to one of the Nominal Headers. |
| - Undo Posting | Undo Posting allows the user to undo a posted entry on the header. |
| - Scheduled Postings | Allows the user to have access for scheduled postings for monthly payment. |
| - - Add Schedule | Allows the user to add a scheduled payment to the nominal SAC. |
| - - Edit Schedule | Allows the user to edit a Scheduled payment in the system. |
| - - Delete Schedule | Allows the user to delete a Scheduled posting. |
| - - Pending Items | Allows the user to view the pending items within the nominal ledger. |
| - - Post | Allows the user to post onto the nominal headers and SAC's. |
| - - Print Pending Sched | Allows the user to print the pending scheduled items. On the ledger. |
| - Print Ledger | Allows the user to have access to print the nominal header and SAC selected. |
| - - Print Nom Ledger | Allows the user to print the nominal ledger the user have selected. |
| - - Print Nom Codes | Allows the user to print the nominal codes to provide a list of them. |
| - - All Ledgers | Allows the user to print all ledgers and their postings and access the date filters. |

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| **Budgets** | Allows the user to access the budgets area of the ledger. |
| - Add Budgets | Allows the user to add a budget to the relevant header selected. |
| - Edit Budgets | Allows the user to edit the budgets of the header. |

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| **Requisitions** | Allows the user to view the requisitions on the system and post them if needed. |

Purchase Ledgers

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| **Purchase Header** | Allows the user to access a list of the purchase headers to select. |
| - Purchase Header Add | Allows the user to add a purchase header to the system. |
| - Purchase Header Edit | Allows the user to edit/amend a purchase header on the system. |
| - Purch Header Delete | Allow the user to delete a purchase header on the system. |
| **Post Entry** | Allows the user to post an entry to the purchase header. |
| **Undo Posting** | Allows the user to undo a posting posted in that period on the system. |
| **Allocate Payments** | Allows the user to allocate any payments to the system. |
| **Print** | Allows the user to print the ledger and also access the below; |
| - Print Ledger | Allows the user to print all postings made to the selected ledger. |
| - Print All Codes | Allows the user to print all codes and postings made to each ledger. |
| **Requisitions** | Allows the user to view the requisitions on the system and post them if needed. |

Banks & Journals

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| **Post Entry** | Allows the user to Post Entry to the any of banks/journals dependant on their setup. |
| - View/Undo Posting | Allows to view or undo the posting on the system. |
| **Search Entries** | Allows the user to filter through the banks and Journals area. |
| - Refresh | Allows the user to refresh once the filters have been added. |
| **Reconcile Bank** | Allows the user to access the bank rec area to tick bank postings against bank statements. |
| - Group Ticking | Allows the user to tick multiple Bank postings against a Bank Statements. |
| **Auto Reconciliation** | Auto Reconciliation allows the user to tick bank postings based on the data from a bank statement in excel format or entered manually within the system. |
| **Auto Rec Print** | Allows the user to print the reconciliations from the system. |
| **Requisitions** | This area allows the user to access any requisitions added to the system. |
| - Authorise Requisitions | Allows the user to authorise requisition postings within the system. |
| - Post Client Requisition | Allows the user to post a client requisition into the system. |
| - Print Requisitions | Allows the user to print requisitions which have been added to the system. |
| **Cheque Printing** | Allows the user to print cheques from the system using the template. |
| **Print Bank** | Allows the user to print the bank postings from the system. |

Smart Actions

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| **Timesheet** | Allows the user to import a CSV for timesheet or add one manually. |
| - Pending Data | Allows the user to view details of timesheets that haven't been submitted. |
| **Auto Billing** | Allows the user to upload bills via CSV or create details of bills in quick succession. |
| **Cli & Matt Data Import** | Allows the user to mass import clients & matters, plus dossier details, into Osprey. |
| **Free2Convey Batch** | Allows the user to batch upload files onto Free2Convey |
| - Free2Convey Batch Log | Allows the user to access the batch upload log for successful & failed F2C files. |
| **Matter History Note** | Allows the user to upload matter history notes, manually or via CSV import. |

COLP/COFA

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| **Oaths** | An area to store details of Oaths, print and search. |
| **Storage** | Allows the user to store details for storage items, print and search. |
| **Fee Sharing & Refs** | Allows the user to store the details of Fee Sharing and Referrals, print and search. |
| **Intro to Third Parties** | Allows the user to store details of Introductions to Third Parties, print and search. |
| **Equality & Div Breaches** | Allows the user to store details of the Introductions to Equality and Diversity Breaches, print and search. |

Reports

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| **Financial Management** | Check each in order to allow a user access: |
| - Trial Balance | Shows the current balance of Nominals, Banks, and Journals. |

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| - Profit and Loss | Shows the current balance of Nominals that are set to P & L Income or Expenditure. |
| - Period End Report | Used for printing month end reports for periods that have already been run. (Period ends are run from the supervisor area) |
| - Client Reconciliation | Compares the client ledger balance figures with the various client banks and reports if in balance or not. |
| - Aged Creditors | A list of purchase ledger account (supplier) balances split across 0, 30, 60, 90 days. |
| - Balance Sheet | An unformatted report showing the nominals and banks and Journals marked as Balance Sheet accounts. As Auditors use different formats for balance sheets, all the figures needed are reported and this can be exported to excel for formatting as required. |
| - Budget Analysis | List of Income and Expenditure Nominals for a quarter or period, showing the actual movement against the Nominal Budget for the period and year to date. |
| - Office Receipts | Office Receipt postings completed between dates two selected dates. |
| - Office Receipts Allocated | Allocated Office Receipt postings completed between two selected dates. This is an extra option report, where the supervisor setting switch is set to allow Analyse costs received. |
| - Year End | This report allows the user to print and reprint year end reports. It does not run the year end procedure, which is performed in the Supervisor area. Use this option if the user need to reprint any year end reports where the year-end has been run in Osprey TM. |
| - Multiple Deposit Ledger Balances | This report shows all clients' deposit balances, whether Controlled Trust, Designated Deposit or Multiple Deposit. |
| - Cash Acc VAT Received | List of all cash received with VAT on it during the month Credit Limit Warnings. |
| - Batch Interest Calculation | This report allows the user to calculate interest due to all clients according to the filters the user have specified. It does not post the interest on the accounts, but just lists the interest due for each transaction on each client's ledger (along with a total due at the end). |
| - Cheque Report | This report lists all cheques which have been generated by the system. |
| - Current Credit Limit Warnings | This report shows clients with current credit limit warnings. Credit Limits for WIP (includes work in progress and disbursements due to the legal aid requirement), debtors (office) and disbursements can be entered either for the overall client in client details or for each matter in matter details. |
| VAT MTD | Allows user to submit VAT digitally |
| - VAT return form submit | Allows user to submit VAT return |
| - Vat Form Submission | View the submission |
| **Client Financial** | Enable this should the user wish to access the reports under the heading. |
| - Aged Debtors | This report lists clients/matters with a Debit balance, ageing the balance according to the period in which the bill was posted |
| - Run Batch Aged Debtor Letters | The letter templates are initially set up in the Supervisor area (Case Management Setup, Standard Letters, and Batch Debtor Letters). A range of Merge fields are available for inclusion on the templates in a similar manner to the Case Management Standard Letters |

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| - Bills Rendered | This report lists the bills that have been produced from Osprey according to the filters the user select. |
| - Cost Transfer | This report lists the matters where there is a Debit balance on Office and monies being held on the Client/matter in the Client bank |
| - Ledger Balance | This report details the balance on office, client, disb, deposit and work in progress for all live matters |
| - Unpaid Bills | This report lists the bills posted on the Client Ledger Cards but which have been fully allocated against a receipt or credit note, so that all or part of the bill is still outstanding. This report is grouped by Fee Earner |
| - Unpaid Disbs | This report lists the Unpaid Disbursement postings entered using the Unpaid Disbursement posting type. |
| - Bills Paid by FE Report | This report lists the paid bills between specified dates |
| - Fees Jnl List Report | This report lists the bills raised between specified dates |
| - Case Cost | This report shows the total cost of all cases included on the report (according to the filter settings the user select) including time, WIP and disbursements. When run on live matters it provides the user running record of costs, and when run on archived matters it produces an average case cost. (Case cost = time billed + WIP + disbursements incurred.) |
| - Case Cost Variance | This report is designed to provide a variance analysis of the user average case cost over time. It includes archived matters only. When run in Summary format, each column gives the average case cost between the specified months, so for example, the column headed 0-12 months will give the average case cost for matters archived between 0 and 12 months ago. 5-17 months column will give the average case cost for matters archived between 5 and 17 months ago. The report therefore produces a rolling average that will help to even out any discrepancies caused by particularly high cost cases. The Variance and Percentage variance columns calculate the variance and percentage variance on the two most recent 12 month periods. |
| - Cli Funds Movement | This report is designed to show the user where the client funds have been moved between ledger. The user also have various filters within the document type as well. |
| | |
| **Other Financial** | Enable this should the user wish to access the reports under this heading. |
| - Audit Trail | This report shows financial postings and which ledgers and journals they have affected. It can be useful in tracking down the second side of a posting if the user are having difficulty finding it. |
| - Purchase Ledger Allocations | This report shows postings on the Purchase Ledger and shows whether payments have been allocated, part allocated or not allocated to their respective invoices. The report appears in Purchase Ledger Code order. |
| - Purchase Ledger Balances | This report shows each purchase ledger on the system along with its current balance (or year-end balance if a year is selected). |
| - Suggested PL Payments | This report shows suggested payments to purchase suppliers based on their payment terms and how long the invoices have been outstanding. |
| - Unposted Audit Trail | This report shows financial postings which have been undone (using the Undo option from the posting detail screen). |
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| **Analysis** | Enable this should the user wish to access the reports under this heading. |

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| - Live Matters | This report outputs non-archived matters according to the filters and groupings the user select. By default no options are selected, which means that the output provided will show ALL non-archived matters ordered by Client Name. |
| - New Matters By User | This generates a report on matters opened between any two given dates created by particular users. |
| - New Matters | This generates a report on matters opened between any two given dates. |
| - Comp Matts By User | This report outputs on matters completed by particular users. For a matter to be completed the last task of the workflow must be run. |
| - Archived Matters | This generates a report on matters archived according to the filters and groupings the user select. By default no options are selected, which means that the output provided will show ALL archived matters |
| - Archived Matts By User | This generates a report on matters archived according to the filters and groupings the user select. By default no options are selected, which means that the output provided will show ALL archived matters and the user who archived them |
| - Key Dates Report | This report lists the Key Dates that have been set according to the filters and groupings selected, by default the report shows ALL key dates completed or not in client number order. |
| - Review Periods Report | The purpose of this report is to show those matters which either have a review period or review date set. Review dates and review periods are not linked, they are treated as two separate functions. Review dates (the initial date, and the type qualifier) are treated as simple reminders, the Review Date must be updated manually, whereas review periods ensure that movement is made on a matter |
| - Fees Analysis Report | This reports an analysis of Fees. By default it will show Fees with grouping Fee Earner and Work Type by Period |
| - Audit Trail (Case Mngmnt) | This generates a report of actions on matters in case management by particular users |
| - Fees Analysis Apportioned Cost | This reports an analysis of Fees, split at bill posting to different Fee Earners. By default it will show Fees with grouping Fee Earner and Work Type by Period. |
| - Analysis Of Costs Received Report | This reports an analysis of receipts paid, against bills. By default it will show Fees with grouping Fee Earner and Work Type by Period. |
| - Fees Analysis By Time Fee Earner | This reports an analysis of Fees according to the time ticked. By default it will show Fees with grouping Fee Earner and Work Type by Period. |
| **Time** | Enable this should the user wish to access the reports under the heading. |
| - Time Spent | This report shows a breakdown of every time entry posted on the system in client number order. The user can choose whether to show Billed, Unbilled, Written off or All time. |
| - Time Spent Summary | This report shows summary totals of time posted on the system grouped by fee earner, work type and whether the work is billed, unbilled or written off. The user can choose whether to show Billed, Unbilled, Written off or All time. |
| - Current Month WIP/Disbs | This report shows the total WIP and disbursements posted in the current month only for each matter |
| - Percentage Recovery | This report shows the difference between billed costs and the amount of time ticked against the bill. |

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| - Work In Progress | This report shows a breakdown of all WIP (Unbilled time which shows on the time ledger) on the system in client number order. It attributes the time to the Matter Fee Earner. |
| - Work In Progress By Time FE | This report shows a breakdown of all WIP (Unbilled time which shows on the time ledger) on the system in client number order. It attributes the time to the Fee Earner who posted the time (the Time FE). |
| Att. note by matter | This report will show attendance notes created on a matter |

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| **Miscellaneous** | Enable this should the user wish to access the reports under the heading. |
| - Contract Work Reports | This enables the user to produce any Contract Work reports that the user need to submit to the CDS, and also allows the user to save the reports for submission on line. For information on how to get the relevant detail to appear in these reports, please refer to the manual. |
| - Spooled Arch Ledger | This enables the user to print the completed ledgers of archived matters which have been spooled. |
| - Nominal Code Report | This enables the user to print a list of all nominal codes in the system. If the user wish to include all nominal SACs (Sub Analysis Codes) tick the box, otherwise it will print only the nominal Headers |
| - Nom Period Report | This enables the user to print all nominal ledgers as at a certain period. |
| - Top Client | Billing Report - This report shows the user the user firm’s top 10 clients’ bills. The top 10 are decided according to the amount of the bills posted on them. |
| - Top Client | New Matters Report - This report shows the user the user firm’s top 10 clients. The top 10 are decided according to the number of matters they have open. |
| - Top User | Tasks Ticked Report - This report shows the user the user firm’s top 10 members of staff. The top 10 are decided according to the number of workflow tasks they have ticked. |
| - Top Client | WIP Report - This report shows the user the user firm’s top 10 clients. The top 10 are decided according to the amount of Work In Progress their matters have on them. |
| - Top Users | Files Opened Report - This report shows the user the user firm’s top 10 members of staff. The top 10 are decided according to the number of matters they have opened. |
| - Top Users | Letters Produced - This report shows the user the user firm’s top 10 members of staff. The top 10 are decided according to the number of letters they have produced. |
| - Client List | This report lists all of the user client’s names and addresses according to the filter options that the user choose. This list can then be used for purposes outside of Osprey TM by exporting to Excel. |
| - Performance Targets | This report shows each fee earner’s performance targets (entered in Code Setup, Fee Earners, and Edit) along with their actual performance figures (taken from the system). |
| Last movement dates | This report will show last movement dates on matters |
| Restricted Matters | This report shows all matters that have restrictions on them |
| Matter Restriction Audit | This report shows changes made to matter restrictions. |
| **Reports (New)** | This allows the user to access custom reports which have been created and saved to Osprey. (using the report writer application) |

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| - Reports Viewer | This allows the user to run custom reports within the system under the Reports (new) area. |

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| **Custom Reports** | Enable this to allow the user to show the following options. |
| Aged Work in progress | This report shows all work in progress aged per ageing periods set |
| - Client List | This report shows the user the list of Clients on the user system. With various filters available as well. |
| - Introducer Report | This will run a source of introduction report in the system. |
| - ATE Report | No Longer Used |
| - Client List Report | This report will again show the list of clients on the user system. |
| - Client Analysis | No Longer Used |
| - Custom email Report | Report for custom emails in the system |

**Supervisor**

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| **Code Setup** | |
| - Work Types | List all work types that have been created |
| - - Add Work Type | Allows the user the rights to add new Work types |
| - - Edit Work Type | Allow the user to edit and archives Work types |
| - - Delete Work Type | Allows a user to Archive (not delete) a work type |
| - - Link Activity | Allows a user to link activities to relevant work types and to determine the actual hourly or unitary rate relating to Time Recording |
| - - List Linked S Letts | No Longer Used |
| - - List Linked W'flows | No Longer Used |
| - - Print Work Types | Allows a user to Print a list of all work types |
| - - Published WTs | Allows a user to Publish a work type (Web Portal purposes only) |
| - - Link Activity | Allows a user to link activities to relevant work types and to determine the actual hourly or unitary rate relating to Time Recording |
| - - Link Sub Category | Allows user to link work type to sub categories |
| - **Activity Codes** | List all activity codes that have been created |
| - - Add Activity Code | Allows a user to create a new activity code |
| - - Edit Activity Code | Allows a user to edit the description of an activity |
| - - Delete Activity Code | Allows a user the ability to archive an activity |
| - - Examine Linking | Allows a user to be able to view the work types activities are linked to |
| - - Print Activity Codes | Allows a user to print a list of activity codes |
| - - Delete Published WTs | Allows a user to remove the published option |
| - - View Dets Pub'd WTs | No Longer Used |
| - - Edit Published WTs | No Longer Used |
| - **Remuneration Types** | Lists all remuneration types that have been created |
| - - Add Rem Type | Allows a user to create a new remuneration type |
| - - Edit Rem Type | Allows a user to edit the details of a remuneration type |
| - - Delete Rem Type | Allows a user to archive a remuneration |

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| - - Link Activity Codes | No Longer Used |
| - - Print Rem Types | Allows a user to be able to print a list of remuneration types |
| - - Link Act Codes Data | No Longer Used |
| - - Link Act Codes View | No Longer Used |
| - - Link Act Codes Edit | No Longer Used |
| - - Link Act Codes Delete | No Longer Used |
| - **Fee Earners** | List all Fee Earners created |
| - - Add Fee Earner | Allows a user to create a new Fee Earner |
| - - Edit Fee Earner | Allows a user to edit the details of a Fee Earner |
| - - Delete Fee Earner | Allows a user to archive a Fee Earner (must not have opened matters) |
| - - Link Rem Type (Hourly) | Allows a user to link a remuneration rate in order to vary standard rem rates. |
| - - Link Act Code (Unitary) | Allows a user to vary unitary rates of activities |
| - - Print Fee Earners | Allows a user to print a list of all Fee Earners |
| - - Link Activity Code | Allows a user to link an activity to a Fee Earner in order to vary the standard rate |
| - - Fee Earner Transfer | Allows a user to transfer matters to a different Fee Earner |
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| - **Groups** | List all groups that have been created |
| - - Add Group | Allows a user to set up groups of users |
| - - Edit Group | Allows a user to edit groups |
| - - Delete Group | Allows a user to delete groups |
| - - Print Groups | Allows a user to print a list of groups |
| - **Franchise Categories** | Lists all Franchise categories set up |
| - - Add Fran Cat | Allows a user to add a Franchise Category |
| - - Edit Fran Cat | Allows a user to be able to edit detail of Franchise Categories |
| - - Delete Fran Cat | Allows a user to archive a Franchise Category |
| - - Print Fran Cat | N/A There is no longer a print facility |
| - **Standard Text Desc** | Displays any standard text that has been set up |
| - - Add Stan Text Desc | Allows a user to set up default text for use throughout various areas of Osprey |
| - - Edit Stan Text Desc | Allow a user to edit standard text |
| - - Delete Stan Text Desc | Allows a to delete standard text |
| - - Print Standard Text | No Longer Used |
| - - Link Merge Fields | Allows the ability to link merge fields to the type of TEXTMSG Standard Text |
| - **Attendance Notes** | |
| - - Add Att Note | Allows a user the ability to create attendance note text (Time recording) |
| - - Edit Att Note | Allows a user to edit any created attendance notes |
| - - Delete Att Note | Allows a user to delete a note |
| - - Print Att Notes | No Longer Used |
| - Fee Earner Status | |
| - - Add FE Status | Allows the user to create a Fee Earner Status |
| - - Edit FE Status | Allows a user to edit a Status Description |
| - - Delete FE Status | Allows a user to archive a Fee Earner Status |
| - Matters for Review | |

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| - - Batch Clearing | Allows a user to batch clear matters for review for a specified date range & FE. |
| **System Setup** | |
| - **Branches** | Lists all branches that have been created |
| - - Add Branch | Allows a user to create a branch |
| - - Edit Branch | Allows a user to edit the details of a Branch |
| - - Delete Branch | Allows a user to archive a branch |
| - - Branch Information | No Longer Used |
| - - Print Branches | Allows a user to print a list of all branches |
| - **Departments** | Lists all created branches |
| - - Add Department | Allows a user to create new departments |
| - - Edit Department | Allows a user to create departments |
| - - Delete Department | Allows a user to delete a department |
| - - Print Departments | Allows a user to print a list of departments |
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| - **Labels Setup** | Lists all labels that have been created (Matter Labels) |
| - - Add Template | Allows a user to create a new matter label template |
| - - Edit Template | Allows a user to edit a template |
| - - Delete Template | Allows a user to delete a template |
| - **Matter Archive Dets** | Allows a user to set up default text for archive locations and references |
| - System Settings | Displays various System Information |
| - - Edit System Settings | Allows a user to edit detail in System Information |
| - - Practice Details | Displays the firms company details |
| - - Practice Det - Edit | Enables a user to edit Practice details |
| - - Third Party Data | Shows all third party details relating to third party integration |
| - - Detail TP Data | No Longer Used |
| - - Edit TP Data | Allows a user to add and edit third party data details |
| - - Edit System Settings | Allows a user to edit detail in System Information |
| - **Comms Settings** | List all communication filters used on a client file |
| - - Add Comms Settings | Allows a user to create additional communication details |
| - - Edit Comms Settings | Allows a user to edit the description of communication detail |
| - - Del Comms Settings | Allows a user to archive a communication detail |
| - - Print Comms Settings | Allows a user to print a list of communication details |
| - - Link Designation | No Longer Used |
| - Users | Lists all Osprey Users |
| - - Add Acc Template | Allows a user to create user access templates |
| - - Edit Acc Template | Allows a user to edit access templates |
| - - Delete Acc Template | Allows a user to delete access templates |
| - - Add User | Allows a user to set up new Osprey users |
| - - Print Templates | No Longer Used |
| - - Access Templates | Allows a user to view all created access templates |
| - - Request Rights | Allows user to enable users for GDPR request rights |
| - - - Add request right | Allows user to add a request right |
| - - Edit User Password | Allows a user to edit a user’s password |
| - - Edit Temp Access | Allows a user to amend temporary access details |

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| - **Ledger View** | Displays ledger views (to be added to user access templates) |
| - - Add Ledger View | Allows a user to create new ledger views |
| - - Edit Ledger View | Allows a user to edit a ledger view |
| - - Delete Ledger View | Allows a user to delete a ledger view |
| - - Posting Type View | Allows a user to create posting views, enabling user to just access specified posting types. |
| - - Post Type View - Edit | Allows a user to edit a posting type view |
| - Configuration Settings | Lists all available switches within Osprey |
| - - Edit Config Settings | Allows a user to edit various switches within the system such autonumbering, enabling/disabling automatic letter charge rate |
| - - Designation | No Longer Used |
| - - Add Designation | No Longer Used |
| - - Edit Designation | No Longer Used |
| - - Delete Designation | No Longer Used |
| - - **Security Groups** | Allows a user to view all security groups set up within Osprey for the purpose of managing permissions within matter history and the general folders area. |
| - - - Add Group | Allows a user to add new security groups |
| - - Email Setup | Allows a user to manage automated email text |
| - - Rebranding | Allows a user to manage rebranding in Osprey, such as changing the design of the log in page, adding a firms logo to the home screen. |

**Financial Setup**

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| - **Banks** | List all client and office banks set up within the system |
| - - Add Bank | Allows the user to create banks |
| - - Edit Bank | Allows a user to edit bank details |
| - - Delete Bank | Allows a user to archive a bank |
| - - Print Banks | No Longer Used |
| - **Cheques** | Displays options for cheque printing purposes |
| - - Setup Options | Enables a user access to set up cheque printing |
| - - Cheque Signatures | No Longer Used |
| - - Add Chq Signature | No Longer Used |
| - - Cheque Templates | Allows a user to create cheque templates (available at time of raising a bill) |
| - - Print Chq Details | No Longer Used |
| - - Cheque Templates | Allows a user to create cheque templates (available at time of raising a bill) |
| - **Interest Rates/Bands** | Allows a user to set up interest rate bands for the purpose of deposit accounts |
| - - Add Band | Allows a user to set up a new interest rate band |
| - - Edit Band | Allows a user to amend the details of bands |
| - - Delete Band | Allows a user to delete bands |
| - - Add Rate | Allows a user to add a new interest rate |
| - - Edit Rate | Allows a user to edit interest rates |
| - - Delete Rate | Allows a user to delete rates |
| - - Accrual Periods | Allows a user to add the accrual period for interest rates |
| - - Print Rates/Bands | No Longer Used |
| - - Accrual Periods | Allows a user to add the accrual period for interest rates |

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| - **Deposit Accounts** | Displays all deposit accounts |
| - - Add Account | Allows a user to set up deposit accounts |
| - - Delete Link | Allows a user to unlink deposit accounts from client matters |
| - - Link to Client - Edit | Allows a user to edit links |
| - - Link to Client - View | Allows a user to view linked deposit accounts |
| - - Link to Client | Allows a user to link deposit accounts |
| - **Periods** | Displays the current financial period set |
| - - Add Period Set | Allows a user to set up a new period set |
| - - Edit Period Set | Allows a user to edit current period sets |
| - - Print Periods | No Longer Used |
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| - **Currency** | List all currencies |
| - - Add Currency | Allows a user to add a new currency |
| - - Edit Currency | Allows a user to edit the details of currencies |
| - - Delete Currency | Allows answer to set currencies out of use |
| - - Print Currency's | No Longer Used |
| - **Countries** | Lists all currencies |
| - - Edit Country Codes | Allows a user to amend the Country Name |
| **Case Management Setup** | |
| - **KPI Details** | List all reports available for the KPI charts visible on the Osprey Home Page |
| - - Link KPI To User | Allows a user to link KPI charts to users |
| - - KPI Master Users | List all user set up in the system |
| - - KPI Link User to Master | Allows a user to link Osprey Users as master users, this enables user to be able to view KPI's for specific Fee Earners |
| - - KPI Details | List all reports available for the KPI charts visible in the Osprey Home Page |
| - **Debt Recovery** | Shows details for debt recovery options |
| - - Add Posting Type | Allows a user to add Posting type details for debt recovery options |
| - - Add Debt Scale | Allows a user to set the bands for debt scale |
| - - Credit History | Allows a user to see the credit history |
| - **Expert Types** | List all expert filters set up within Osprey |
| - - Add Expert Type | Allows a user to add new expert types |
| - - Edit Expert Type | Allows a user to edit a description of an expert type |
| - - Delete Expert Type | Allows a user to archive expert types |
| - - Link Letters | Allows a user to view letters linked to expert types |
| - - Print Expert Types | No Longer Used |
| - - Area of Expertise | List all areas of expertise that have been added |
| - - Add Area of Exp | Allows a user to add an area of expertise, these are additional filters for experts |
| - - Edit Area of Exp | Allows a user to amend the description |
| - - Delete Area of Exp | Allows a user to archive an area of expertise |
| - **Key Date Types** | Shows all key date types set up within Osprey |
| - - Add Key Date Type | Allows a user to create new key date types |
| - - Edit Key Date Type | Allows a user to edit the description of a key date type |
| - - Delete KD Type | Allows a user to archive a key date |
| - - Print Key Dates | Allows a user to print a list of all key date types |

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| - - Batch KD Ticking | Allows a user to batch clear outstanding key dates for specified Fee Earners within a data range. |
| - **Formulae** | Display a list of formulas created within the system. |
| - - Add Formula - Edit | Allows a user to edit existing formulas |
| - - Add Formula | Allows a user to create new formulas |
| - - Edit Formula | Allows a user to edit formulas |
| - - Delete Formula | Allows a user to delete formulas |
| - - Asks | List all Ask statements created in Osprey |
| - - Add Ask | Enables a user to create asks for use in formulas and letters |
| - - Edit Ask | Allows a user to edit an Ask |
| - - Delete Ask | Allows a user |
| - **Standard Documents** | List all standard document templates in Osprey |
| - - Add Standard Doc | Allows a user to create a new standard document |
| - - Edit Standard Doc | Allows a user to edit the details of a standard document |
| - - Delete Standard Doc | Allows a user to delete a standard document |
| - - Test Standard Doc | Allows a user to run a preview of a standard document |
| - - Charge Rates | Allows a user to set default time recording rate on documents |
| - - Add Current Doc | Allows a user to copy an existing standard document |
| - - Examine WT Link | Allows a user to view letters linked to a specific worktype |
| - - Batch Aged Debt Letts | Allows a user to create template relating to aged debts |
| - - Letter Email Links | Allows a user to add auto email options on document templates |
| - - Oyez Forms | Allows a user to view any linked Oyez forms |
| - - Oyez Forms Add | Allows a user to link new Oyez forms into Osprey |
| - - Oyez Forms Link Fields | Allows a user to link mergefields to Oyez forms |
| - - -Lexis Forms Config | Allows users to view Lexis forms main screen |
| - - -Lexis Forms Config Add | Allows a user to add forms in the main scren |
| - - - Lexis Forms Config Fields | Allows a user to link lexis forms fields |
| - **Workflows** | displays a list of all created workflows |
| - - Create Workflow | Allows a user to create a workflow description |
| - - Edit Workflow | Allows a user to edit the name of a worfklow |
| - - Delete Workflow | Allows a user to delete a workflow |
| - - Print Workflows | Allows a user to print a list of existing workflows |
| - - Letter Criteria | Allows a user to set letter criteria |
| - - Task Link Desig | No Longer Used |
| - - Link Tasks | Allows a user to link tasks to workflows |
| - - Link Actions | Allows a user to link actions to tasks |
| - Tasks | List all  tasks created within the system |
| - - Create Task | Allows a user to create workflow tasks |
| - - Edit Task | Allows a user to edit a task |
| - - Delete Task | Allows a user to delete a task |
| - - Copy Task | Allows a user to copy existing tasks |
| - - KD Action Link Task | Allows a user to link a task to a keydate |
| - - Charge Rates | Allows a user to set standard letter charge rates |

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| - - Tasks Links | Allows a user to link actions to a task |
| - - Charge Rates | Allows a user to set standard letter charge rates |
| - - Charge Rates - Edit | Allows a user to edit standard letter charge rates |
| - - Action Oyez Forms Crit | Allows a user to set criteria against Oyez forms linked to tasks |
| - **Dossier Pages** | List all dossier pages created within Osprey |
| - - Add Dossier Page | Allows a user to create new dossier pages |
| - - Edit Dossier Page | Allows a user to edit the details of a dossier page |
| - - Delete Dossier Page | Allows a user to delete dossier pages |
| - - View Page | Allows a user to view detail on a dossier page |
| - - Link Work Types | Allows a user to link dossier pages to worktypes |
| - - Print Dossier Pages | Allows a user to print a list of dossier pages |
| - - Link Fields to Pages | Allows a user to link fields to dossier pages |
| - - Action Link Desig | No Longer Used |
| - - Letter Rates | Allows a user to set standard letter rates |
| - - Link Actions to Pages | Allows a user to associate specific workflow actions with dossier pages |
| - **Dossier Fields** | List all dossier fields created within the system |
| - - Add Dossier Field | Allows a user to create new dossier fields |
| - - Edit Dossier field | Allows a user to edit details of a field |
| - - Delete Dossier Field | Allows a user to delete fields |
| - - View Linked Letters | Allows a user to view fields linked to letters |
| - - Dossier List Fields | Allows a user to view/edit & create lists used in dossier fields |
| - - Print Dossier Fields | Allows a user to print all current fields |
| - **Workflow Sections** | List created workflow sections |
| - - Create W'flow Section | Allows a user to create workflow sections |
| - - Link Tasks | Allows a user to link tasks to workflows |
| - Setup Conv Portal | For XIT2 Customers only |
| - - Import XML File | For XIT2 Customers only |
| - Adjust W'flow Dates | Allows a user the ability to amend the date a wokflow task was run on |
| - RTAPI Claim Fields Map | Allows a user to set up mapping of field for the purpose of using RTAPI Portal |
| - **E-mail Templates** | Lists all available email templates that have been created |
| - - Add E-mail Temp | Allows a user to create email template |
| - - Change Rates (Fixed) | Allows a user to set an automated time recording rate on email templates |
| - - Change Rates (Hourly) | Allows a user to set an automated time recording rate on email templates |
| - - Change Rates (Fixed Link Data) | As above |
| - - Rates (Hourly - Base) | As above |
| - Matter History | |
| - - Type | Allows a user to create matter history types |
| - - Audit | Allows a user to run an audit on matter history |
| - Smart Actions | |
| - - Auto Billing | Allows a user to view an audit |
| - **COLP/COFA** | |
| - - List Management | Allows a user to manage list found in the COLP and COFA area |
| - Configure SF Searches | Allows a user to link searchflow searches to work types |

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|---|---|
| - Configure SF Map Links | Allows a user to map Osprey fields to searchflow forms |
| - Configure SF Edit | Allows a user to edit the worktype linking for forms |
| - SDLT Forms Conf List | Allows a user to link SDLT (gov) form to wortypes |
| - SDLT Conf Map Links | Allows a user to map Osprey fields to SDLT |
| - SDLT Forms Conf Edit | Allows a user to edit mapped fields |
| - Dossier Actions | No Longer Used |
| - Edit Dossier Action | No Longer Used |
| - Configure Land Registry Searches | Allows the user to access Land Registry configuration. |
| - Configure Land Registry Searches Add | Allows a user to link Land Registry searches to work types |
| - Configure Land Reg Searches Link Field | Allows a user to link fields to forms |
| - **Free2Convey** | |
| - - F2C Batch Log | Allows a user to view logs relating to batch uploads |
| - Bundle document settings | Allows a user to edit document settings for bundles |
| - **GDPR** | |
| -- Retention Policies | Allows a user to set retention polices |
| -- Disposition | |
| - **User Design** | |
| - - Dossier Page Field Edit | Allows a user to view dossier pages to link to views and amend |
| - - Dossier Page Preview | Allows the user to preview dossier pages |
| - - Dossier Page Design | Allows the user to design the fields on a dossier page |
| - - Dossier Lists | Allows a user to set up dossier lists for use with dossier fields |
| -- Page Field Links | Allows a user to view linked fields |
| -- Letter Link fields | Allows a user to link dossier fields to letters |
| - - Preview Letter | Allows a user to preview a letter template |
| - - Questionnaire Admin | Allows a user to set up Questionnaire administrators (Web Portal users only) |
| - - Add WT Admin | Allows a user to create a new Worktype Administrator (as above) |
| - - Edit WT Admin | Allows a user to amend Worktype Administrators |
| - - Delete WT Admin | Allows a user to delete a Worktype Administrator |
| - **View** | |
| - - Add View | Allows a user to create views (matter extensions, questionnaires, etc.) |
| - - Edit View | Allows a user to edit views |
| - - Delete View | Allows a user to delete views |
| - - View Link Field | Allows a user to view fields linked to views |
| - - View Design | Allows a user to design the order and add notes to fields in views |
| - - View Preview | Allows a user to preview created views |
| - - View Link Desig | No Longer Used |
| - - Pub Views In Use | Allows a user to view all published views (Web Portal use only) |

**Report Setup**

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| - Report Type | Allows a user to create heading for new reports (only applicable to users using the report writer application) |

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| **Tools & Utilities** | |
| - Product Information | Displays dates of all software updates |
| - Login Manager | Allows a user to view login details of users |
| - User Licences | No Longer Used |
| **Financial Periods** | |
| - Set Post Period Date | Allows a user the ability to set the current posting date |
| - Run Period End | Allows a user to run the period end |
| - View Period End Hist | Allows the user to view all previously run periods and to print period reports |
| - Run Year End | Allows a user to run year end |
| - View Year End Hist | Allows a user to view all previous year end dates and print reports |
| **Web Publishing** | Enables web portal functions |
| **CRM-AF1 Add Rates** | The following Displays details for Legal Aid Rates – details cannot be amended and are just for information only |
| - AF1 Fees Uplifts | As above |
| - AF1 Fees Uplifts Dets | As above |
| - AF1 Fixed Fees | As above |
| - AF1 Fixed Fees Detail | As above |
| - CRM Crown Courts Dets | As above |
| - AF1 Fees Cracked First Third Detail | As above |
| - AF1 Fees Cracked Later Detail | As above |
| - AF1 Schemes Detail | As above |
| - CRM Police Schemes | As above |
| - CRM Police Stations | As above |
| - CRM Prison Law Fees | As above |
| - CRM Schemes Detail | As above |
| - CRM Crown Courts | As above |
| - AF1 Fees Cracked First Third | As above |
| - AF1 Fees Cracked Later | As above |
| - AF1 Schemes | As above |
| - CRM Police Schemes | As above |
| - CRM Police Stations | As above |
| - CRM Prison Law Fees | As above |
| - CRM Schemes | Allows a user to view all scheme updates (Criminal LA) |
| **CRM Auto Posting Defaults** | Allows a user to set up posting defaults for Legal Aid Bills |
| **Reprint CRM611 Spreadsheet** | Allows a user the ability to reprint CRM Claim forms |

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| **Edit Include Docs** | Allows a user to edit include docs |
| **Include Documents** | Allows a user the ability to set up Include Docs (for use in standard documents) |
| **Portal Set Up** | Allows a user to amend the style sheet for Web Portal site |
| - Associate Access | Lists all created associates |

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|---|---|
| - - Add Associate | Allows a user to create Associates |
| - - Edit Assoc Access | Allows a user to edit associate details |
| - - Delete Assoc Access | Allows a user to delete associates |
| - **Conveyancing Setup** | |
| - - Council Rates | Allows a user to set up conveyancing rates for conveyancing calculator |
| - - - Add Council Area | Allows a user to create new councils |
| - - Conveyancing Rates | Allows a user to set up conveyancing rates |
| - - - Conv Rate Band | Allows a user to create conveyancing bands |
| - - - Conv Rates | Allows a user to set up conveyancing rates |
| - - Conv Fees Setup | Allows a user to set up conveyancing fees |
| - **Web Publishing Information** | |
| - - Edit Web Pub Info | Edit the webpublishing information |
| - Edit web pub info | No longer used |
| - - **General Messages** | Allows a user to set up general messages for Web Portal use |
| - - - Edit Gen Messages | Allows a user to edit general messages |
| - - - Delete Gen Mess | Allows a user to delete general messages |
| - - - Add new message | Allows a user to add anew message |
| - - Portal New Page setup | Allows a user to add a new title to their web portal site and page content (HTML) |
| - - Access Temp Setup | Allows a user to create new templates for web portal use |
| - - - Web Portal Acc Edit | Allows a user to edit access templates |
| - - - W P Access Temp | Allows a user to view portal templates |
| - - Doc View Setup | Allows a user to add this option to a template |
| - - Publish Deal Room | Allows a user to add this option to a template |
| - - Finalize Version | Allows a user to finalise documents published to the deal room (Portal use only) |
| - - Configuration | |