Osprey Approach: Access Template Breakdown

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https://support.ospreyapproach.com/?p=820

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Osprey™ Approach

This guide will show you the options available in your access templates

Home

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	

Clients & Matters

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

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

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.
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 custom data page 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.
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.
qsinternal	
Custom Questionnaires	Allows the user to create custom questionnaires

Time Recording

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
- 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
	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		
	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 custom data 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 custom data page.
	- View Details	Allows the user to view the details within the custom data pages.
	- Notes	Allows the user to add notes against the custom data 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 custom data 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 custom data 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.
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
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.
- 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.
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 custom data pages specific to legal aid/Civil Billing
Edit Form Data	Allows the user to amend details held in the custom data pages.
Manage Lists	Enables the user to amend lists available in the custom data pages.
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.
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

- 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

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.
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 client 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

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

Purchase Ledgers

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

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

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 custom data page 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

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

Financial Management	Check each in order to allow a user access:
- Trial Balance	Shows the current balance of Nominals, Banks, and Journals.
- 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
- 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).
Analysis	Enable this should the user wish to access the reports under this heading.
- 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.
- 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

Reports

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.
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

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
- - 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
- **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	
- - 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
- **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
- **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

- **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
- **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
- **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
- - 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
- - 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 custom data pages created within Osprey
- - Add Dossier Page	Allows a user to create new custom data pages
- - Edit Dossier Page	Allows a user to edit the details of a custom data page
- - Delete Dossier Page	Allows a user to delete custom data pages
- - View Page	Allows a user to view detail on a custom data page
- - Link Work Types	Allows a user to link custom data pages to worktypes
- - Print Dossier Pages	Allows a user to print a list of custom data pages
- - Link Fields to Pages	Allows a user to link fields to custom data 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 custom data pages
- **Dossier Fields**	List all custom data fields created within the system
- - Add Dossier Field	Allows a user to create new custom data page 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 custom data page 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
- 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 custom data pages to link to views and amend
- - Dossier Page Preview	Allows the user to preview custom data pages
- - Dossier Page Design	Allows the user to design the fields on a custom data page
- - Dossier Lists	Allows a user to set up custom data lists for use with custom data page fields
-- Page Field Links	Allows a user to view linked fields
-- Letter Link fields	Allows a user to link custom data 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	
- Report Type	Allows a user to create heading for new reports (only applicable to users using the report writer application)
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

Supervisor

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
- - 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	

Employee Claims

-Expense claims	Allows a user to add a claim for expenses
-Overtime claims	Allows a user to add a claim for overtime