Osprey Approach: Configuration Settings

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The latest version is always online at
https://support.ospreyapproach.com/?p=17512

Within the Supervisor Area, Supervisor > System Setup > Configuration Settings, you are able to set behaviour for various areas of Osprey.

Switch Name	Type/ Available Values	What the values do
Add Dossier Defaults	TRUE/FALSE	When set to True, any Default settings you have set for dossier fields will be applied automatically to a dossier page for each client/matter.
Address Locator	List: None / Postcode Anywhere	When set to PostcodeAnywhere, and dependent on user information having been set up from within System Setup > System Settings > Third Party Data for POSTCODEANYWHERE (you will need your own account) Osprey integrates with PostcodeAnywhere to provide an address search based on post code entered.
Allow Auto Update Of Legal Aid Rates	TRUE/FALSE	No longer used
Allow Future Postings	TRUE/FALSE	When True, allows the user to post financial entries into the next financial period whilst the accounts staff are reconciling the bank for the current financial period. Also dependent on Financial Security Template set against the user.
Allow Retrospective Postings	TRUE/FALSE	When True, allows the user to post financial entries into prior financial period. Also dependent on Financial Security Template set against the user.
Alpha Client Numbering	TRUE/FALSE	Set to True, allows client numbers to be created with letters in them, e.g. B0002. Uses the first set number of characters of the surname (or company name if a company client) to create the client number. Also dependent on Client Alpha Numbering settings below. Set to False will only create numerical client numbers, e.g. 00001, 00002 etc..
Analyse Costs Received	TRUE/FALSE	When set to True, a box will appear during posting of office receipts or cost transfer client to office, asking you to analyse the costs received. Once this box is filled in, the information entered is used to generate the costs received analysis report.
Auto Disbursements Allocation	TRUE/FALSE	When set to true, when a financial posting is made that incorporates disbursements, automatically tries to allocate against the relevant corresponding disbursement.
Auto Open Dossier	TRUE/FALSE	When set true, on addition of either a new client and matter, or just a new matter, on Saving, the user is taken to Case Management > Dossier rather than back to clients and matters page. Useful if you want to remind users to add dossier info.
Auto Payments Allocation	TRUE/FALSE	When set to true, when a financial posting is made that could be used to pay a bill, e.g. Cost Transfer client to office, office receipt, automatically tries to allocate against the relevant corresponding bill.
Automate Infotrack Disbursements	TRUE/FALSE	When set to true, will post an office bank payment posting to the client ledger when a chargeable Infotrack search is made, using the Bank account set in Infotrack Disbursements Bank Account switch. ****Available from version 1.5 only.**

Automatic Timer Start	TRUE/FALSE	When set to True, Osprey's Time Recording Timer at the top of the screen will automatically begin time recording on the client selected.
Bill Auto Numbering	TRUE/FALSE	Set to True, provides an automatic bill numbering system. When posting a bill the reference automatically appears as #NEXT# and on saving the posting a bill number will be assigned. Next bill number to use can be set in Supervisor > System Setup > System Settings.
Bill Filtering	TRUE/FALSE	NO LONGER USED.
Cheque Printing	TRUE/FALSE	No longer used, though cheques can still be printed from Osprey if required.
Client Auto Numbering	List: Off / Alphanumeric / Numeric	Alphanumeric – this allows client numbers such as B0002, BRO0001, MCK002 to be assigned to your clients as you add them. The number of characters displayed from the surname/company name is dependent on the two settings below for client auto numbering. Numeric – only client numbers will be assigned with a format of 00001, 001, 0000001 etc. Dependent on the Client Auto Numbering - Total Length setting. Off – Osprey will not generate any client numbers, you will need to add the number yourself.
Client Auto Numbering - alpha length	Number less than 10	Specifies the number of alpha (letter) characters to use within the automatically generated client number. If set to 3 and the client name is Jones, the client number will be generated as JON... - dependent on Client Auto Numbering – Total Length setting below.
Client Auto Numbering - total length	Number less than 11	Specifies the number of numeric (number) characters to use within automatically generated client numbers. If the setting for client auto numbering – alpha length is 3, and the total length is 4, first client Jones will be created as JON0001, second client Jonsson will be created as JON0002 etc. Total length can be no larger than 10.
Confirm Untick Bank Postings	TRUE/FALSE	No longer used - bank postings will ask to confirm tick or untick of bank postings.
Conflict of Interest Include Archives	TRUE/FALSE	When set to True, when performing a conflict of interest – matter search, the Include Archives option will be set automatically to Yes. When set to False, it will default to No.
Costs Apportionment	TRUE/FALSE	When set to True, enables user to split client bills between fee earners during the bill posting routine.
CRM Autobilling	TRUE/FALSE	Set to True, allows a different bill template to be used for CRM6 bills, and automatically bills the matters on production of the CRM6 report.
Default Email Sender	List: User / FeeEarner / Practice	Sets the email address to be used as default when emails are sent within Osprey.
Default matter history filter type	List: Expression / Default	The default search filter to use within the Matter History. Default will start to show items beginning with the term you type, Expression allows * to be used as a wild card.

Default matter history order	List: Last modified date DESC / Created date DESC / Process date DESC / None	The default sort option used when navigating to the Matter History.
Display Key Dates for Archived Matter	TRUE/FALSE	When set to True, if there are upcoming key dates on archived matters, these will show on the Osprey Home page for the relevant fee earner/user, if set to False, archived matter key dates are ignored.
Document Production Show Global	TRUE/FALSE	When set to True, the Show Global tick box is automatically ticked in Case Management > Document Production so that the user can automatically see both worktype specific and global documents together. When set to False, the tick box is unticked, but can be ticked to allow the user to find the global letters.
Edit Archived Dossier	TRUE/FALSE	When set to False, the dossier is not editable on archived matters. When set to True, changes can be made and saved on archived matters.
E-mail Refresh Period	Number (seconds)	NO LONGER USED.
Email Template Time Recording	List: Fixed / Hourly / None	As Standard Letter Time recording. When set to Hourly, email template records at a percentage of the fee earner's hourly rate dependent on the rate set per template. When set to Fixed, will default to the Standard Letter Price in System Settings. When set to None, email templates sent are not time recorded automatically.
Enable Associate Document View	TRUE/FALSE	Relates to Osprey Client Portal. If you have an associate linked to matters, set this to True if you want the Associates to be able to see web enabled items, and False if you don't.
Enable Client Views	TRUE/FALSE	NO LONGER USED.
Enable Diary Integration	TRUE/FALSE	NO LONGER USED.
Enable Office Credit	TRUE/FALSE	When set to True, if user makes any posting which will put the office ledger into credit, requires password to complete posting. When False, user can post with no password.
Enable Task Run From Key Dates	TRUE/FALSE	When set to True, allows user to run linked tasks from the Key Dates screen
Expert Type Filtering	TRUE/FALSE	When set to True, allows user to filter Case Management > Document Production and Supervisor > Case Management Setup > Standard Letters screens by Expert Type. Blanks lists if False.
Fee Earner Restricted View	TRUE/FALSE	NO LONGER USED. Superceded by Matter Restrictions.
General costs fe code	Text: fee earner code	NO LONGER USED.
Granted Local Admin Access	TRUE/FALSE	NO LONGER USED.
Hide cheque requisitions on Client Ledger	TRUE/FALSE	When True, the Pending Requisitions and Projected Balances are hidden from the Client Ledger

Infotrack Disbursements Bank Account ID	Text: Office Bank ID	The Office Bank account to use when automatic Infotrack Disbursements postings are made. ****Available from version 1.5 only.**
Label Printing	TRUE/FALSE	When True, tick box is visible on adding/editing a matter to create a matter label. When False, tick box is not available.
Matter History Folder	TRUE/FALSE	NO LONGER USED SINCE 6.3 NEW MATTER HISTORY FOLDERS
Matter Restricted Access	TRUE/FALSE	Enables/disables matter restrictions for all matters.
Merge Contact DX	TRUE/FALSE	When set to True, a standard letter containing a contact or organisation address field will merge the DX address first if found, or the Address if not.
Merge Multiple Client Names	TRUE/FALSE	When True, allows all client name fields to be merged into standard letters in Case Management Setup > Standard Letters. When False, only displays the first client name for each client to be used.
Notify Requisitioner at Posting	TRUE/FALSE	When set to True, the tick box to Notify Requisitioner when posting an authorised requisition from the bank is ticked by default, when False it is unticked.
Online Search	List: None / TMNLiss	NO LONGER USED. When set to TMNLiss, integrates with the TM Group's online search function. You must have an account with TM Group to use this, and your user details must be set in System Setup > System Settings > Third Party Data.
Opening Balances	TRUE/FALSE	When set to True, matter numbers can be overridden rather than defaulting to the next available matter. Requires password to change, which is the day number of the year e.g. 1 January will be 1, 31 December will be 365 or 366 on a leap year.
Print Requisition	TRUE/FALSE	When set to True, the tick box to Print Requisition when saving a requisition is ticked by default, when False, it is left unticked.
Prospect Checked Default	TRUE/FALSE	If set to True, the prospect box is checked by default. If set to False, the prospect box must be manually checked.
Purchase Code Auto Numbering	TRUE/FALSE	When set to True, new purchase ledgers added will be allocated a code automatically, PL1, PL2 etc.. When set to False, the user must assign a code manually when adding a new purchase ledger.
Scottish Rules	TRUE/FALSE	Set to True, accounts are dealt with as per Scottish Rules.
Searchflow Order Autoposting	TRUE/FALSE	NO LONGER USED
Server Side Merging	TRUE/FALSE	NO LONGER USED
Spool Archived Ledgers	TRUE/FALSE	When set to True, on archiving a ledger, the copy ledger print is saved to Reports > Miscellaneous Reports > Spooled Archive Ledger. When set to False, on archiving a ledger the copy ledger print is displayed automatically as soon as you save the archival.
Spool for Printing by Default	TRUE/FALSE	When set to True, when a bill is posted, Spool for Printing will be ticked by default in order to generate a printable copy of the bill

Standard Letter Time Recording	List: Fixed / Hourly / None	Fixed – time records merged and saved standard letters at the Standard Letter Price set in Supervisor > System Setup > System Settings. Hourly – each letter can be set to record a number of minutes, and the fee earner's hourly rate is used. Off – standard letters are not time recorded. Please see How To guide for more information.
Standard Letter Time Recording Fee Earner	List: Matter / User	When set to Matter, time recorded letters are recorded for the matter fee earner, when set to User, time recorded letters are recorded for the fee earner assigned to the user ID. Dependent on Standard Letter Time Recording switch being set.
Suppress zero balances in Period End	TRUE/FALSE	When True, matters where the balance for all ledger columns is zero are not displayed on the ledger balance listing. When False, all ledgers are displayed.
Text Messaging	TRUE/FALSE	When set to True, allows integration with TextAnywhere service to be used (allowing workflow tasks to be set to automatically text a client). You must sign up with TextAnywhere to use this service.
Time Behaviour For Converted Matters	List: Write off time / Retain time	Relates to prospect matters which are made live. When Write Off Time is selected here, the Write Off Time tick box next to Go Live is ticked by default, when Retain Time is ticked, the Write Off Time box next to Go Live is unticked.
Time Record on Client Reports	TRUE/FALSE	NO LONGER USED
UFN Override	TRUE/FALSE	When True, allows UFN number for Legal Aid matters to be changed, when False, no change can be made.
Unique Bill Numbers	TRUE/FALSE	When True, when a bill is posted with a number already used, a warning is shown that the posting has a duplicate bill number. When False, any bill number can be used.
VAT - Agency Default	TRUE/FALSE	When set to True, the Agency tick box for non-vatable disbursements is ticked by default in postings (e.g. Office Bank Payment). When set to False, the box is left unticked by default.
VAT Registration Type	List: S - Standard / C - Cash Accounting / None	Selects the method of VAT for your system. Please ask your accountant prior to changing this setting, and if your accountant has requested you switch from Cash Accounting to Standard VAT or vice versa, please ensure that this is done immediately after a month end has taken place.
VAT Rounding	List: Up / Down	Set to Up, rounds up any VAT calculated, and set to Down rounds down the VAT.
Web Access Enabled	TRUE/FALSE	Relates to Client Portal. Set to True to allow items in the matter history, workflows and key dates to be marked as Web Enabled.