

Osprey Approach: Label Printing (Browser)

This help guide was last updated on
Dec 22nd, 2022

The latest version is always online at
<https://support.ospreyapproach.com/?p=30700>

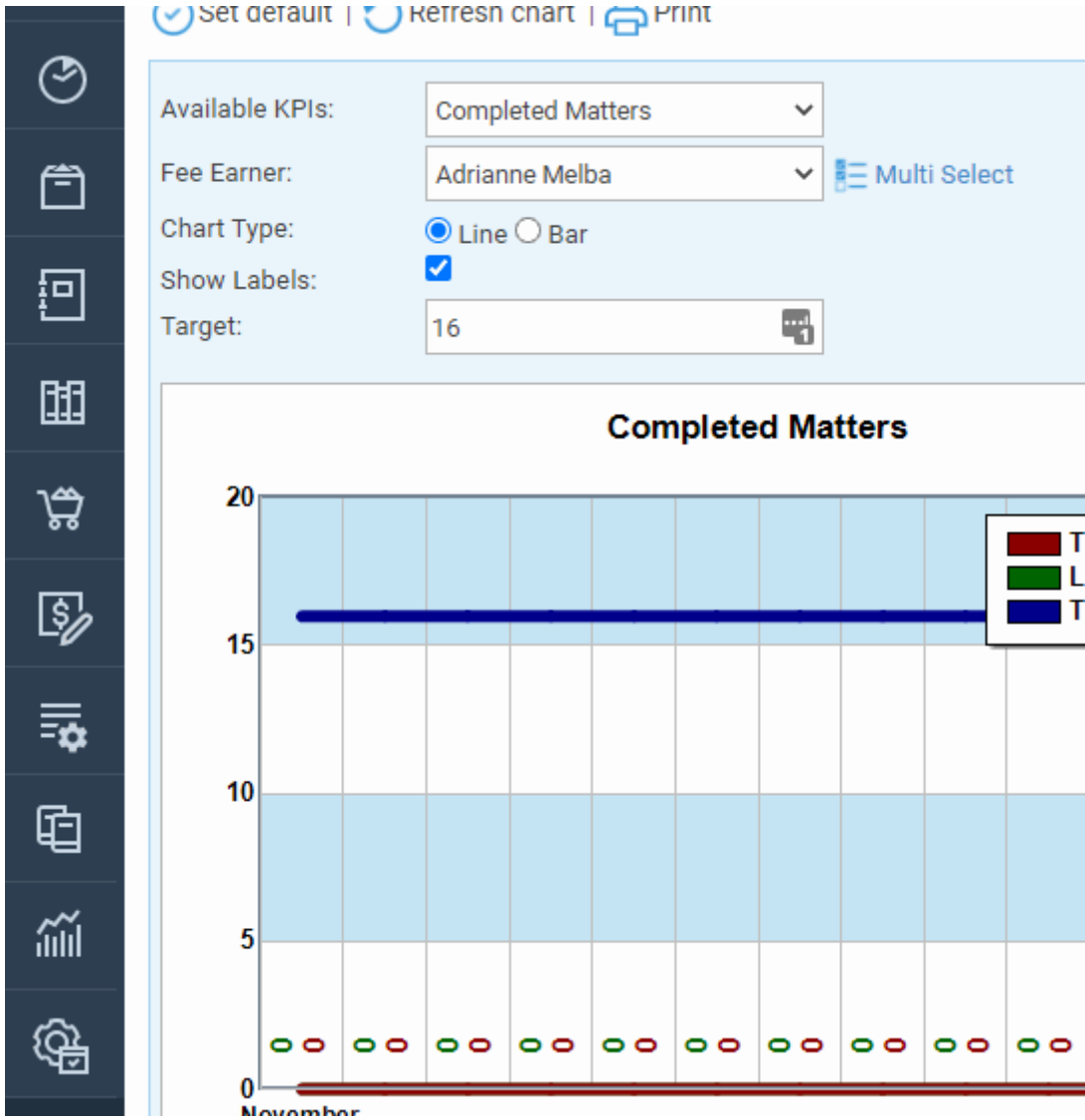
[Click here for a printer-friendly version](#)



You can produce a printed matter label for your paper files using Osprey. This guide will show you how.

Enable Label Printing

Before you can print labels for your files, you will need to turn on the option to do so. In the browser, navigate to Supervisor > System Setup > Configuration Settings:



Supervisor > System Setup > Configuration Settings

Locate the switch called Label Printing, right click it, and set it to True, then Save your changes.

SWITCH NAME	SWITCH VALUE
Enable Task Run From Key Dates	True
Expert Type Filtering	True
Fee Earner Restricted View	False
General costs fe code	GENCOS
Granted Local Admin Access	True
Hide cheque requisitions on Client Ledger	False
Label Printing	True

Edit Label Printing to set it to True

Design your Label Template

In the Supervisor Menu select System Setup>Label Setup then click New.

The screenshot displays the Osprey software interface. At the top, there is a navigation bar with the Osprey logo and a global search bar. The sidebar on the left contains various navigation icons. The main content area is divided into several sections:

- KEY PERFORMANCE INDICATOR REPORTS:** This section is expanded and shows filters for Available KPIs (Time Spent WIP), Fee Earner (No fee earners linked), Chart Type (Line/Bar), and Show Labels (checked). A Target field is also present.
- MATTERS FOR REVIEW:** This section contains a table with the following data:

F/E	CLIENT	MATTER	MATTER DESCRIPTION	REVIEW DATE ↑	TYPE
CJM	MAT0000001	4	Limit Fields Completed	26/05/2022	
- YOUR KEY DATES:** This section contains a table with the following data:

F/E	CLIENT	MATTER	CLIENT NAME	KEY DATE ↑	TYPE	SUP F/E?	ASSIGN
CJM	MAT0000001	1	Matthews Carly C	31/05/2022	CHASEINVST	●	Carly Matthew

Give your label template a name, and click Save.


Supervisor

Code Setup

Labels Setup

Add


 Save

 Cancel

Label Description:

Right click your new label template, and select Edit

 New

 Export



LABEL DESCRIPTION

testest

 Edit


fraser tes


Select Design

 Save

 Delete

 Cancel

 Design

 Preview

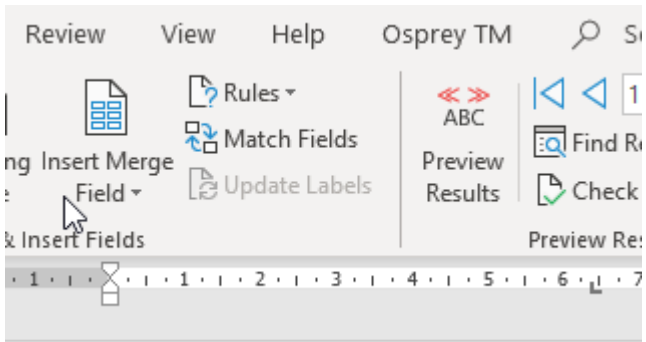
Label Description:

testest

Word will open. You can now design your template.

Create the template to fit the stationery you have. We would recommend using a table for this.

To place merge fields into the document, select Insert Merge Field from the Mailings tab on the ribbon and choose the appropriate field.



{INCLUDETEXT "C:\\Users\\neilb\\AppDa

Our Ref:	{ MERGEFIELD MATTER_client_no } { MERGEFIELD
Your Ref:	

Once you have designed your first label, copy the data into the second cell. Then place your cursor at the start of the text in the second cell and select Rules click Next Record. The entire row can be copied to the remaining cells.

Close and Save the template.

Printing Labels

To print matter labels, Select Clients & Matters>Matters>Label Printing:

Osprey
Approach™
Osprey Approach Test

Today's Units: 0
 Today's Time: 00h:00m
 Today's Value: £0.00

Osprey Home

KEY PERFORMANCE INDICATOR REPORTS ▾

Set default | Show chart |

Available KPIs: ▾

Fee Earner: ▾

Chart Type: Line Bar

Show Labels:

Target:

MATTERS FOR REVIEW ▾

F/E	CLIENT	MATTER	MATTER DESCRIPTION
-----	--------	--------	--------------------

Select the relevant template from the list, to print an already printed label select Printed

Print

Delete

Cancel

Select Label Template: ▾

Filter Labels: ▾

Blank Labels To Insert:

Copies to Print:

Tick the labels to be printed, click Print, the labels will be merged into Microsoft Word and can be printed.