

Osprey Approach: Managing your Departments

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The latest version is always online at
<https://support.ospreyapproach.com/?p=63211>

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This guide will go through managing your firm's departments in Osprey Approach

Departments work as cost centres within Osprey, allowing you to monitor and manage profit and expenditure at a departmental level. e.g. a department named Conveyancing might encompass all the work types relating to conveyancing.

Viewing your Osprey Departments

To access the list of departments you have within Osprey, go to Supervisor > System Setup > Departments

SupervisorSystem SetupDepartments		
NewExportRefresh	Search...	FilterList
DEPARTMENT DESCRIPTION	DEPARTMENT WEIGHTING	IN USE
		Checked
Civil Department	0.00	
Crime	12.00	
Conveyancing	0.00	
Legal	0.00	
Other	0.00	

Adding a Department

To Add a new department, click New at the top of the page.

SupervisorSystem SetupDepartmentAdd

SaveCancel

Department Description:

Department Weighting (%):

Is Default:

In Use:

☒

☒

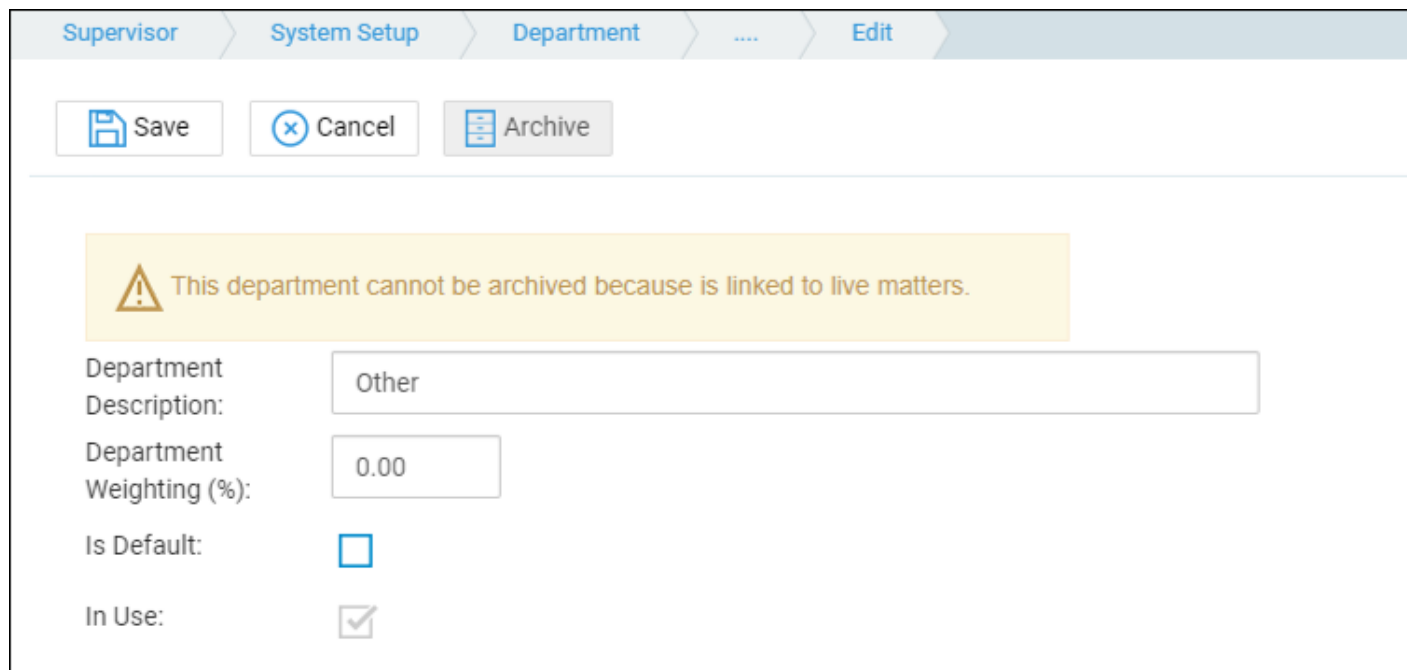
- Department Description - This will be the description of the department.
- Department Weighting - All departments must collectively equal 100%.
- Is Default - Make this the default department.

- In Use - Unticking this will archive the department.

Modifying a Department

You can rename any departments, adjust the weighting, set to be default, or archive it at any time.

To do this, right click the relevant department and click Edit



The screenshot shows a web interface for editing a department. At the top, there is a breadcrumb navigation bar with links: Supervisor, System Setup, Department, ..., and Edit. Below the navigation bar, there are three buttons: Save (with a floppy disk icon), Cancel (with a close icon), and Archive (with a folder icon). A yellow warning box with a triangle icon contains the text: "This department cannot be archived because is linked to live matters." Below the warning box, there are four form fields: "Department Description:" with a text input containing "Other", "Department Weighting (%):" with a text input containing "0.00", "Is Default:" with an unchecked checkbox, and "In Use:" with a checked checkbox.

Make any amendments, and click Save

Removing a Department

Departments can only be archived if there are no live matters linked. Running the Live Matters Report can help identify which matters are still open.

Edit the department, and click Archive.

Supervisor

System Setup

Department

....

Edit



Save



Cancel



Archive

Archive

Department
Description:

Other

Department
Weighting (%):

0.00

Is Default:

☐

In Use:

☒