

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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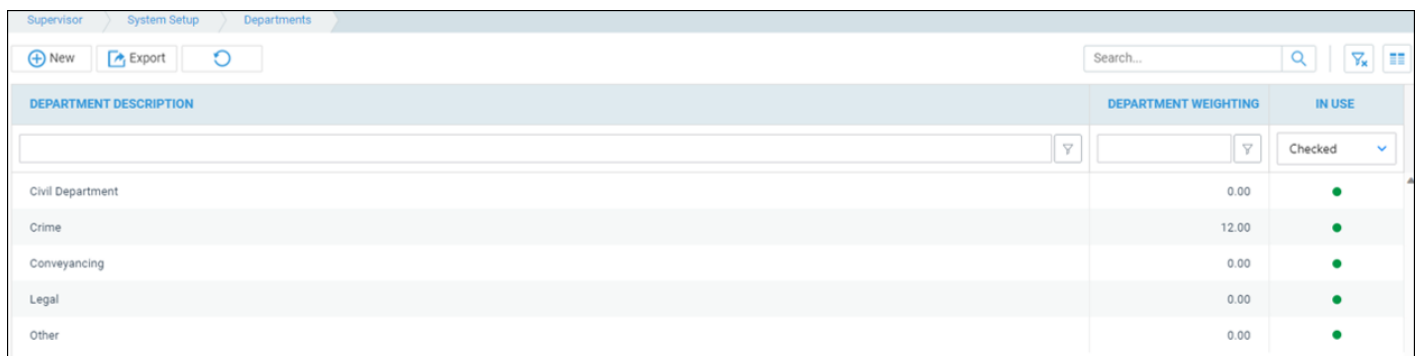


This guide will go through managing your firm's departments in Osprey Approach

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

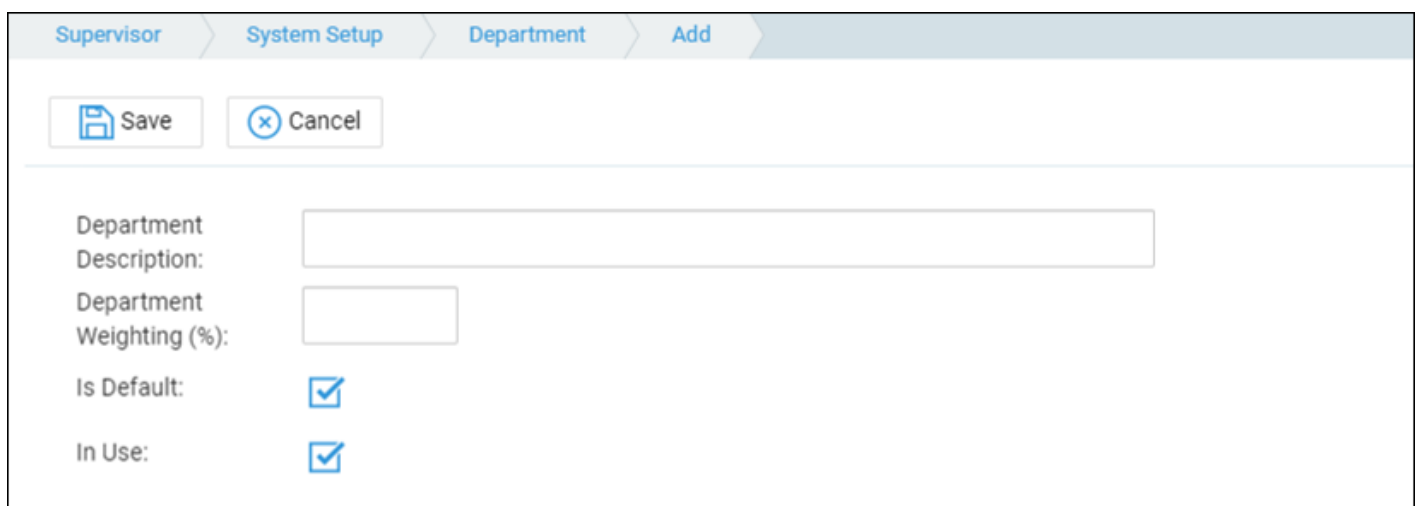


The screenshot shows the 'Departments' page in the Osprey Approach system. At the top, there are navigation tabs for 'Supervisor', 'System Setup', and 'Departments'. Below the tabs are buttons for 'New', 'Export', and a refresh icon. A search bar is located on the right. The main content is a table with three columns: 'DEPARTMENT DESCRIPTION', 'DEPARTMENT WEIGHTING', and 'IN USE'. The table lists several departments: Civil Department, Crime, Conveyancing, Legal, and Other. Each department has a weighting value and a status indicator (a green dot).

| DEPARTMENT DESCRIPTION | DEPARTMENT WEIGHTING | IN USE |
|------------------------|----------------------|--------|
| 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.



The screenshot shows the 'Add Department' form in the Osprey Approach system. At the top, there are navigation tabs for 'Supervisor', 'System Setup', 'Department', and 'Add'. Below the tabs are buttons for 'Save' and 'Cancel'. The form has four fields: 'Department Description' (a text input field), 'Department Weighting (%)' (a text input field), 'Is Default' (a checkbox), and 'In Use' (a checkbox). Both checkboxes are checked.

Department Description:

Department Weighting (%):

Is Default:

In Use:

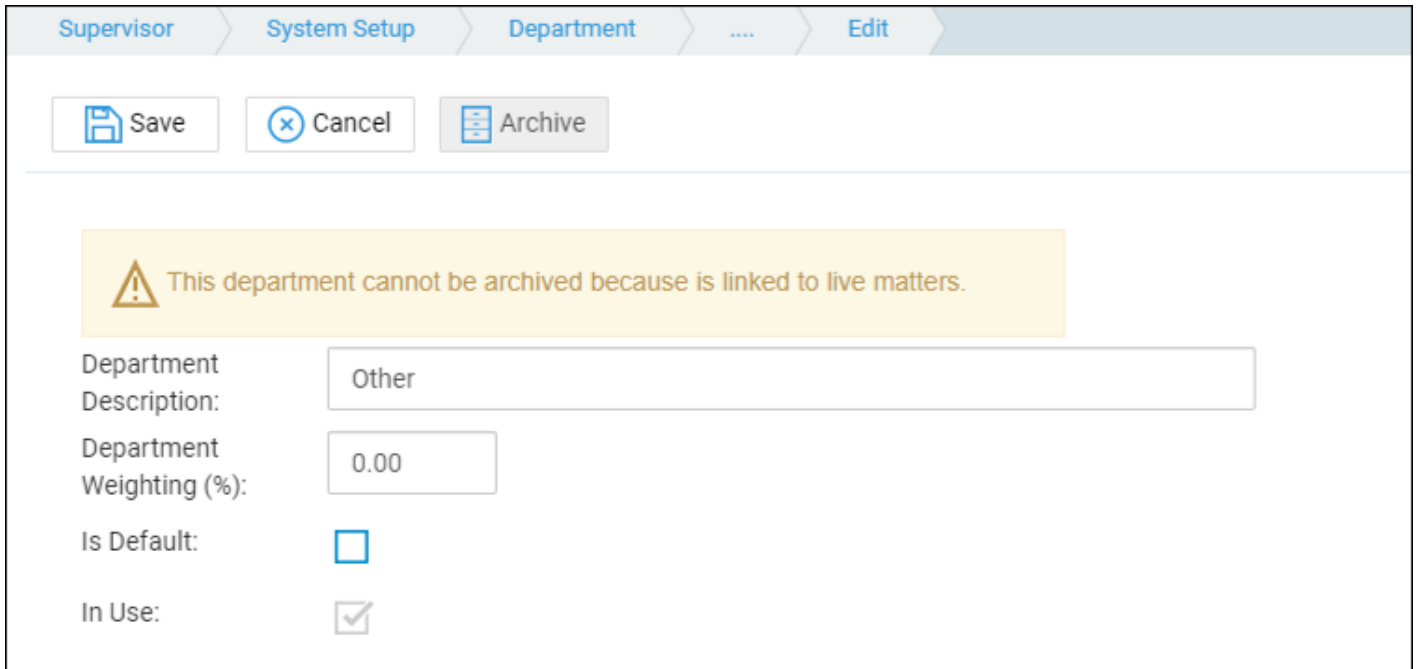
- Department Description - This will be the description of the department.
- Department Weighting - All departments must collectively equal 100%.
- Is Default - Make this the default department.

- 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 trail: Supervisor > System Setup > Department > ... > Edit. Below this, 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 contains a warning icon and the text: "This department cannot be archived because is linked to live matters." Below the warning, 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.

 Save

 Cancel

 Archive

Archive

Department
Description:

Other

Department
Weighting (%):

0.00

Is Default:

In Use: