

Osprey Approach: Configuring Email Signatures

This help guide was last updated on
Dec 21st, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=32601>

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Osprey can be set up to use one of either

- System Signature - this is the same for all users/branches.
- Branch Signature - this can be set differently for each of your separate branches.
- Allow User to Select Signature - when this option is set, your users can select which signature they want to use, along with creating their own.

Supervisor Setup – set your default signature behaviour

Supervisors will need to set up the system to determine how the signatures work.

Supervisor > System Setup > System Settings > Edit.

Scroll down until you locate the section headed Email Signature Behaviour:

WIP % Warning

Standard Letter Price:

Default Currency:

Review Range (days)

Range in days for calculation of Matters for Review and Key Dates

Document autosave interval(minutes)

If the interval is set to 0, the document auto saving is disabled!

Email signature behaviour:

- Use system signature
- Use branch signature
- Allow user to select the signature

Automatic email signature behaviour: Use system signature Use branch signature

Application Timeout:

Review Date Default Offset Period(days)

Select the setting you require, then scroll back up to the top of the screen and click Save. The default setting for new users is to Inherit From System, so whatever you set here will be the standard setting.

Supervisor Setup – Edit your Users

To enable different settings for different users, each user also has the option to Inherit from system/Use Branch Signature/Allow user to select.

Navigate to Supervisor > System Setup > Users. Right click the user you wish to edit, and then scroll down to the Email Signature Behaviour section:

Supervisor > System Setup > Users > Add User

StylePath: Default

Preferred Ledged View: Default View

Financial Security View: Not Allowed

Posting Type View: Default View

Password Expires: 19/04/2021
Password will expire based on system settings.

Number of Logins Remaining Description: N/A
(Information Only.)

User Licence: Flexi
(0 Loyalty Licences Available.)

Supervisor:

FE Restricted View:

Email signature behaviour: Inherit from system Use branch signature Allow user to select the signature

Email Client:

Select the option you require, then scroll back up to the top of the screen and click Save.

Results grid – System Settings vs User Setting

The table below shows all the combinations of System Settings and User settings, and which email signatures may be used.

| System Setup Setting | User Setting | Branch? | System? | Own? |
|--------------------------------|--------------------------------|----------------|----------------|-------------|
| Use system signature | Inherit from system | | | |
| Use system signature | Use branch signature | | | |
| Use system signature | Allow user to select signature | | | |
| Use branch signature | Inherit from system | | | |
| Use branch signature | Use branch signature | | | |
| Use branch signature | Allow user to select signature | | | |
| Allow user to select signature | Inherit from system | | | |
| Allow user to select signature | Use branch signature | | | |
| Allow user to select signature | Allow user to select signature | | | |