



Osprey Approach: Configuring email signatures

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



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.




Set up, system signatures, branch signatures and individual signatures on Osprey

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:

Supervisor	System Setup	System Settings
WIP % Warning		75
Standard Letter Price:		15.00
Default Currency:		Pound Sterling 
Review Range (days)		120
		Range in days for calculation of Matters for Review and Key Dates
Document autosave interval(minutes)		0 
		If the interval is set to 0, the document auto saving is disabled!
Email signature behaviour:		<input checked="" type="radio"/> Use system signature <input type="radio"/> Use branch signature <input type="radio"/> Allow user to select the signature
Automatic email signature behaviour:		<input checked="" type="radio"/> Use system signature <input type="radio"/> Use branch signature
Application Timeout:		8 hours 
Review Date Default Offset Period(days)		7

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	✓	✗	✓