



Release Notes

Update: v2.16.2

Windows Case Management App



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Email subject line

Previously, if users were to send an email through the case management app, there would be no subject line for the email. In the browser version of Osprey there is a subject line "Email Regarding Case: Matter Description".

In this update, the subject line is now pre-populated as it is in the browser.

Send e-n	nail		□×
0 Attach	Signa	Template: (none) High Importance: Create message for client: ature Low Importance: Create message for associate:	
	From*:	u@cbiz.ro (Fee Earner)	-
	То		
Send	Cc		
	Bcc		
Subject:		Email Regarding Case : p/o 123456 high street	
Edit 🕶	Form	at • Tools • Table •	
RBC	•	Formats - B I E E E E E E - E - E E B I	

Compose Ema	il	
← 0	Image: Second	
Attach	Attach From Matter History Signature	
From	u@cbizro (Fee Earner)	⊵
То		Send
Cc		
Bcc		
Subject	Email Regarding Case: p/o 123456 high street	
Body		
	· · · · · · · · · · · · · · · · · · ·	<u>U</u>



Email signatures not formatting correctly in the CM app

Previously, when sending emails from the case management app, the email signature formatting was not the same as when it was sent via the browser.

In this update, the signatures will appear the same way, regardless where they're sent from.

Matter history folder area

Previously, the side panel of the case management app matter history could not be collapsed as it can in the browser. Users were able to drag the side panel closed, but these settings would not be retained.

In this update, there is a collapse / expand column that will show or hide the panel.

Case Management - D00003/3 (Dingle Dave/p/o 123456 high street) FE: ADRI WT: CPUR



+ Add Document + Add Note 🛛 Request Signature (DocuSign)

🕗 In Tray Items	TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	MATTER DESCRIPTION
Signature Requests		1953	D00003	Dingle	3	p/o 123456 high street
✓ ➡ Matter History						
> 🗋 0_Adelini						
> 🗋 0_Adelini						
> 🗋 0_Test						
> 📋 00 Folder						
> 🗀 0000						
0000NEW	,					
🗀 1 Folder	<					
> 🗀 1_20_1						
> 📋 123 folder						
> 🗋 14_08_regression						
> 🗋 24_07Regression						
ChrisF						
Client Correspondence						
> 🗀 Cris						
🗀 Dan						



Sorting by processed date

This update now ensures all items in the matter history are ordered chronologically by the files processed date.

'Ask to send' settings

Documents now will have the 'email to client' and 'email to related associate' options unchecked as default. This option can still be selected when appropriate, but it won't be selected by default.

Previously:

Processed Date
Email to Client?
Email to related Associates?
Automatic Time Recording

Processed Date		
21/04/2022		
Email to Client? Email to related Associates?		
Automatic Time Recording		



Include Documents not updating

Previously, there were occasions where Include Documents would be updated however the documents that they were used on, would not update to show the later version unless they were opened in design mode.

In this update, when an Include Document is updated, any documents they are used on will automatically update.

Excel documents

Excel documents can be produced through the case management app as well as the browser.

Document Production - D00003/3 (Dingle Dave/p/o 123456 high street) FE: ADRI WT: CPUR

 [^] Change Client/Matter
 [^] Email
 [^] Conflict of Interest
 [^] Enable Client Web Access
 [^] Send SMS
 [^] Document Production
 [^] Add Matter
 [^] Edit Matter
 [^] Client Contact Details
 [^] Dossier Matter Level
 [^] Notes Matter Level
 [^] Client Details
 [^] Archive
 STANDARD LETTERS
 LEXIS NEXIS FORMS
 PDF
 EXCEL

 Fxpert Type
 [^] (None)
 [^]
 [^]

схренттуре	(itone)	
Search Description		Search
Include Global		
DESCRIPTION		
Completion Statemer	nt - EXCEL	
RW Test 123		



_

Selecting / unselecting actions in workflows

The check boxes to run actions within workflows have now been moved to the lefthand side. This makes it easier to know which action has been selected or not.

Previously:

Report to Client - Distance Clients - FEE EARNER (RCP Workflow)	Ť	2	
Allocate a Custom Questionnaire:Report to Client		\checkmark	l
Send Standard Document:Checklist for SDLT		\checkmark	
Send Standard Document:Cli - Enclosing contract DISTANCE		\checkmark	
Send Standard Document:Cli - Safe Move Scheme details		\checkmark	
Display a message to the user:DON'T FORGET TO USE INCREASED LAND REG FEES ON COMP STATEMENT		\checkmark	
Send Standard Document:Cli - Completion Statement		\checkmark	
Send Standard Document:Cli - Property Report - NEW		\checkmark	
Send Standard Document:Cli - Guide to Witnessing Documents		\checkmark	l
Send Standard Document:Co-Ownership Form - NEW		\checkmark	ł
Send Standard Document:Sole Ownership Form		\checkmark	
Send Standard Document:LandReg - JO Form		\sim	

Update:

purchase task 1 (Buy property)	↑ ▶	
V Allocate a Custom QuestionnaireMatts CTW Test		
Add Matter History itembuilding papers		
V Update Chain View StatusReady To Complete		
Add a Keydate to matter		1
✓ Display a Matter View		
Siplay a Matter View in Web Publisher:Matter View		
Send merged email template.Test Workflow Email		
Send Welcome Text Message (Workflow With Sections)	↑ ▶	
Send a text message to a client.Dear Client, thank you for choosing Practice Ltdl p/o 123456 high street		
✓ Add a Keydate to matter		
V Display a message to the user		
✓ Display a message to the user		
Z Display a message to the user: The Space Shuttle Challenger disaster was a fatal accident in the United States' space program that occurred on January 28, 1986, when the Space Shuttle Challenger (OV-099) broke apart 73 seconds into its flight	nt, killing all	

seven crew members aboard. The mission carried the designation STS-S1-L and was the tenth flight for the Challenger orbiter and twenty-fifth flight of the Space Shuttle fleet. The crew was scheduled to deploy a communications satellite and study Halley's Comet while they were in orbit. The spacecraft disintegrated over the Atlantic Ocean off the coast of Cape Canaveral, Florida, at 11:39 a.m. EST (16:39 UTC).



CC & BCC fields

CC and BCC fields can now be viewed when previewing emails in the case management app.



Email sent date in bundles

Previously, when an email was exported to Osprey, using the Outlook Add-in, and included in a bundle, there was no sent date visible in the bundle.

In this update, when emails are sent using the Outlook Add-in and are included in a bundle, the sent time / date will now show.



Bundles page limit

The page limit on bundles has now been removed so there is no longer an unexpected error message on bundles containing more than 1,000 pages.

Client numbers containing spaces

Previously, users were able to add clients with auto client numbering turned off. This resulted in files where the client number contained a space, which causes issues when attempting to load that client in the case management app showing the space as an exclamation mark.

In this update, any client numbers with spaces will display as spaces instead of exclamation marks.

Conflict of interest searches

Previously, when running a conflict-of-interest search and selecting Dossier, only client level dossiers were appearing to search in.

In this update, both client level and matter level dossier pages will now appear.

Dossier pages – contacts add / search

Previously, it was not possible to add, search, or edit contacts in the same manner as organisations within the case management app.

In this update, if there is a contact field on a dossier page, there is the option next to it to search, add or edit contacts.

Sol	icitor	contact

None selected





Add contacts / organisations from within workflows

The functionality to add, search, or edit contacts and organisations from within a workflow questionnaire has now been added to the case management app.

RUN TASK - FILE OPENING/DATA COLLECTION FWRCSI (SALE RESIDENTIAL CONVEYANCING FOCUSED WORKFLOW FWRCSI V3)	
1 Allocate a Custom Questionnaire	
2 Allocate a Custom Questionnaire	
Net	
ALLOCATE A CUSTOM QUESTIONNAIRE	
ORGANISATION DETAILS FWRCSI	
Local Authority	
(None selected)	
Local Authority Ref	
Managing Agent	
(None selected)	



Matter permissions

Starting with this version (v2.16.2), matter permission functionality has been added. These settings can be performed from the browser version of Osprey starting with version v1.28.0. There is now a system switch for Matter Restricted Access;

False –

No system level matter restrictions are be applied.

Specific restrictions can be manually added for Users and / or Security Groups against individual Matters.

To apply restriction on a Matter to one or multiple Users and/or Security Groups, go to Clients / Matters > Edit Matter > expand the "Restrict Matter Access" extension and transfer single or multiple Users and/or Security Groups to restricted area then click Save.

Orprey Approach care management						
=	Today's Units: 2 Today's Time: 00h:12m Today's Value: £360.00		Global search		۹	mihai 🔗
Osprey Browser App	Workflow Status Bar					P
分 Home	Edit Matter					
유 Client/Matter 표	Save					
Case Management	Publish					
Client Ledgers	Email cbstestm@gmail.com					
🛐 Banks & Journals 🗄	Load Default Workflow					
Contacts	Create Label?					
Organisations	Matter Extension					
Case Bundle	Restrict Matter Access					
Packages	System Groups	Groups with Permission	ADAMB	Users with Permission MIHAI		
① Time Recording	Group 000		ADELINI	ALIN		
Ŭ,	jane	»	ALEXH	» ALINA		
iiii Reports 🖽	LVL2	>	ALEXS	AMY		
	NDirectors			ANCA		
	All			ANDREI		
	Test			BENK		
(?) Help	Litiantian			CADIV		
Sign Out					I'm Posit, your v	rtual assistant! Please, tell me what you want to do

"System Users" box is designated for Users with restriction on that Matter. "System Groups" box is designated for Security Groups with restriction on that Matter.

True –

In this case, any Matter can only be accessed by its Fee Earner, the Supervising Fee Earner and anyone who is within the original Supervisor access template.



Oppry Approach Case Management – O X							
=		Today's Units: 2 Today's Time: 00h:12m Today's Value: £360.00	Global search	Q	mihai 🔗		
۲	Osprey Browser App	Workflow Status Bar			0		
ŵ		Last 10 Client/Matters Accessed					
***		Search Again ree same MIHAI FE WTH GRADE		WORK type MH_WT1			
Ē	Case Management	Client/Matter 100003/5		Client Name Wilson			
ť	Client Ledgers	Matter Description Cancer Research UK Fee Earner Adam8		Work Type CR			
\$	Banks & Journals 🛛 🗄	Client/Matter D0003/1		Client Name Dave Dinnle			
*	Contacts	Matter Description P/O 1234 High Street, TW11 8PN		oure onigre			
凲	Organisations	Fee Larner Dave Dingle		Work Type CPUR			
000	Case Bundle	Client/Matter PNN0001/4 Matter Description Matter added from IOS		Client Name Cyril's Pandora			
	Packages	Fee Earner Adelini		Work Type A_G			
\bigcirc	Time Recording 🛛 🕀	Client/Matter REG00030/3		Client Name Regr 1278 OA FN Regr 1278 OA SN			
۵ĩ	Reports 🔳	Matter Description Mob Port DocuSign Fee Earner MIHAI FE WITH GRADE		Work Type MH_WT1			
		Client/Matter REG00030/2 Matter Description		Client Name Regr 1278 OA FN Regr 1278 OA SN			
0	Help	MZLA RAGT 1278 DA Fee Enner MIHAI FE WITH GRADE		Work Type MH_WT1			
٢	Sign Out				I'm Posit, your virtual assistant! Please, tell me what you want to do		

When searching for a client that a user does not have access to, it will display in red

If they were to then attempt to click on the matter, they will be met with a pop up stating that they don't have permission to view this matter;

Coprey Approach Case Management — X						
=	Today's Units: 2 Today's Time: 00h:12m Today's Value: 1360.00	Global search	۹ mihai			
Browser App	Workflow Status Bar					
ப் Home	Last 10 Client/Matters Accessed					
유옥, Client/Matter 표	Search Again ree: Lando MIHAI FE WITH GRADE	work type MH_WT1				
Case Management	Client/Matter 100003/5	Client Name Wilson				
Client Ledgers	Matter Description Cancer Research UK Fee Earner AdamB	Work Type CR				
💱 Banks & Journals 🗄	Client/Matter D00003/1	- Freeze le				
Contacts	Matter Description P/O 1234 High Street, TW11 8PN	Error You do not have permission to view this client/matter				
Crganisations						
Case Bundle	Client/Matter PNN0001/4 Matter Description Matter added from IOS	Ok				
Packages						
🕚 Time Recording 🛛 🖽	Client/Matter REG00030/3 Matter Description	Client Name Regr 1278 OA FN Regr 1278 OA SN				
📶 Reports 🗉	THE EARLY AND A STATEMENT AND	Work Type MFLWT1				
	Client/Matter REG0030/2 Matter Description MULA Regr 128 GA	Client Name Regr 1278 OA FN Regr 1278 OA SN				
(?) Help	Pee Earrer MIHAI FE WITH GRADE	Work Type MH_V/T1				
🕑 Sign Out			I'm Posit, your virtual assistant! Please, tell me what you want to do			