# Release Notes

Update: v2.16.2

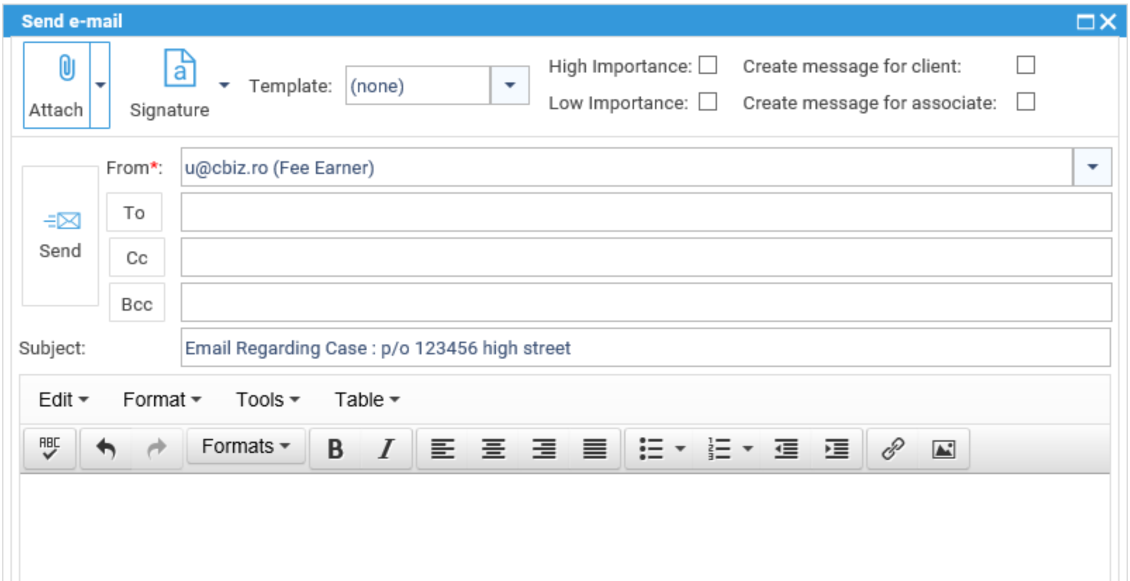
Windows Case Management App

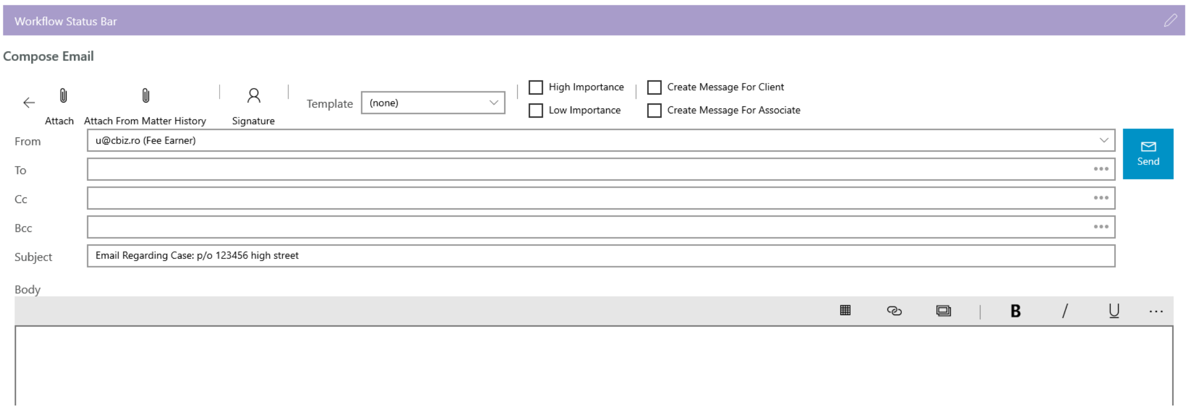
# Contents

# 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.



# Email signatures not formatting correctly in the CM app

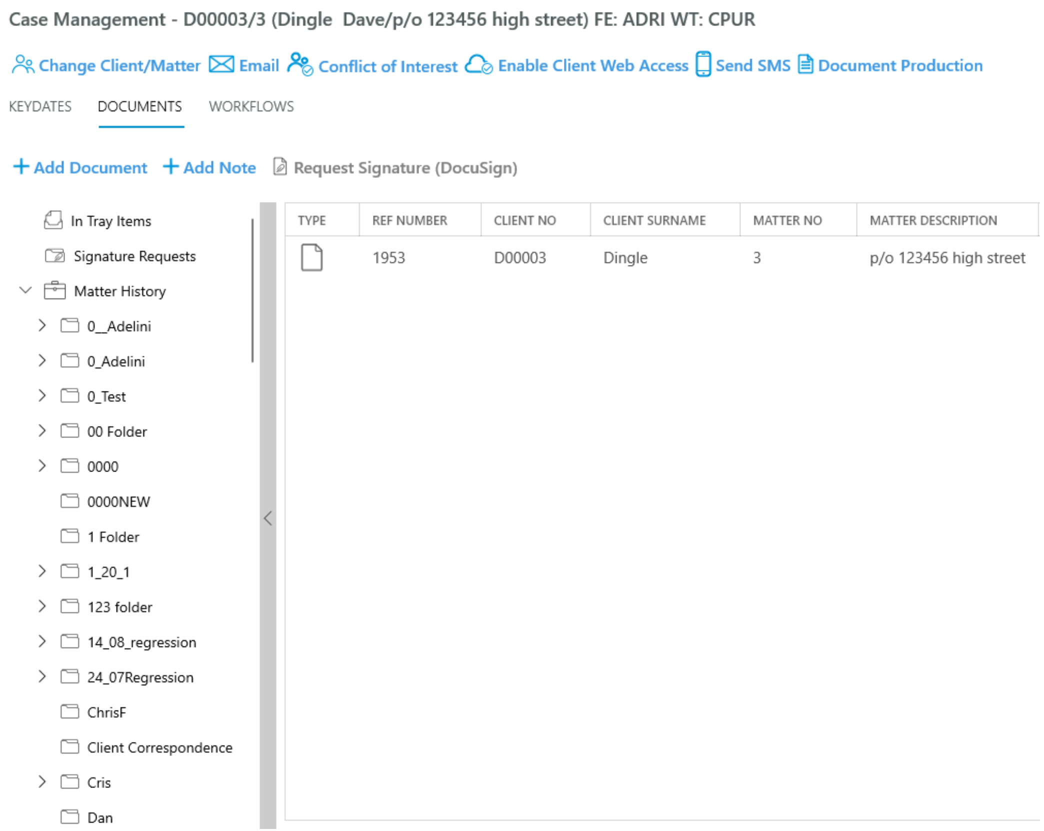
Previously, when sending emails from the case management app, the email signature formatting was not the same as when it was sent via the browser.

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.



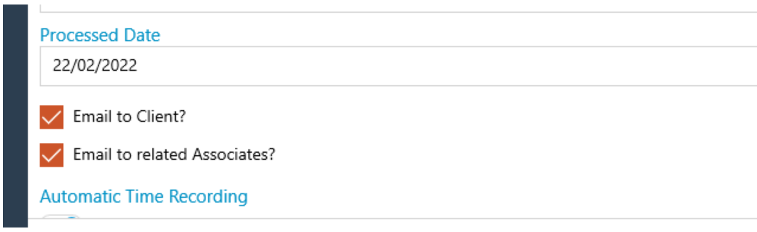
# Sorting by processed date

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

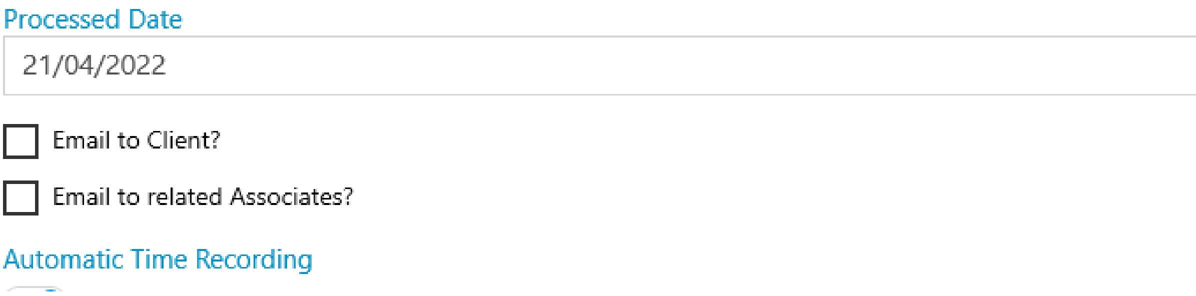
# ‘Ask to send’ settings

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:




Update:



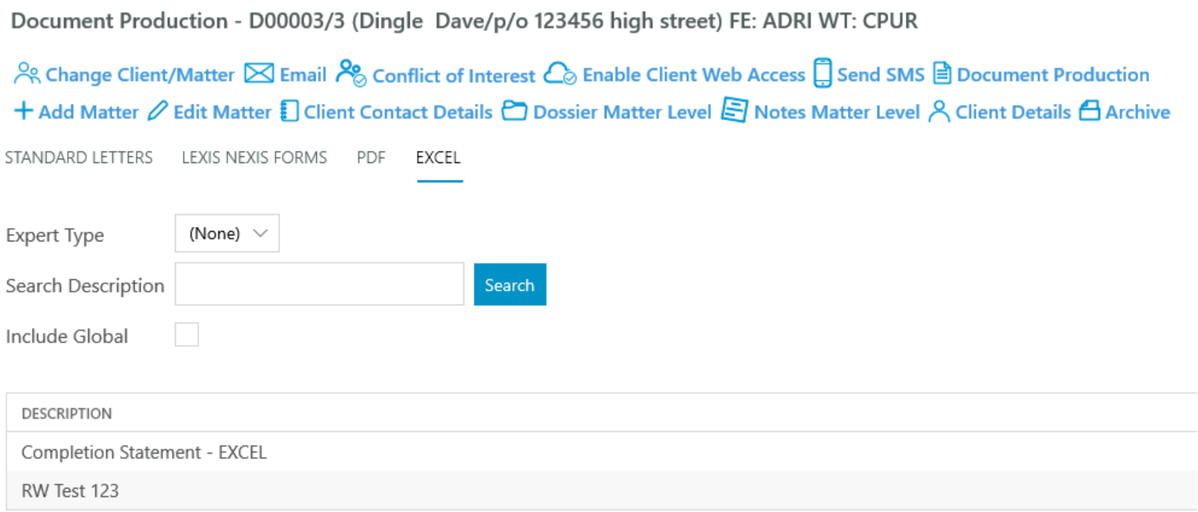
# Include Documents not updating

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

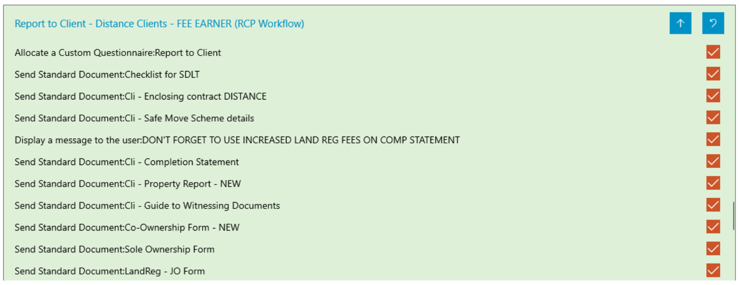
Excel documents can be produced through the case management app as well as the browser.



# Selecting / unselecting actions in workflows

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

Previously:

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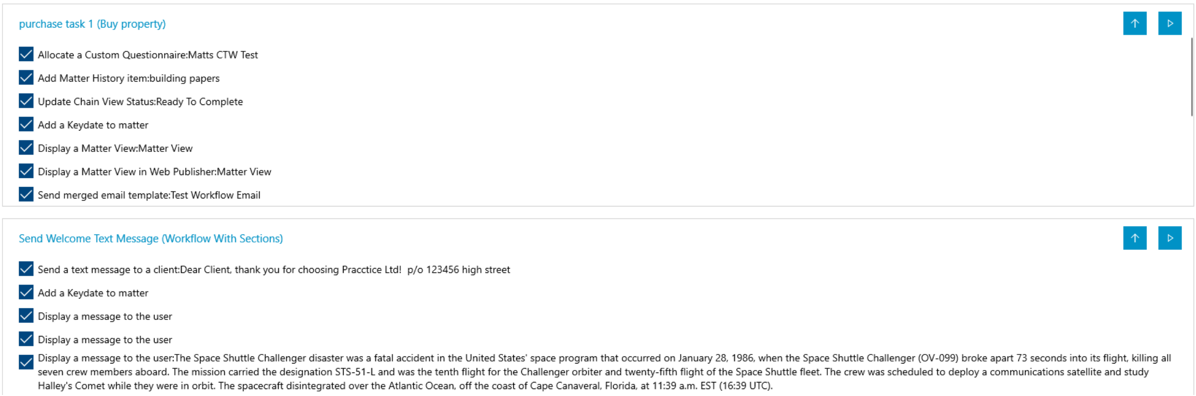
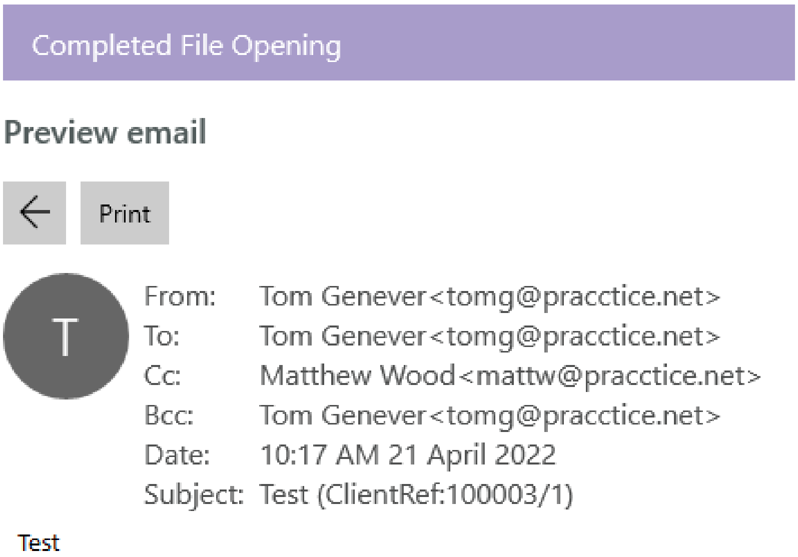


# CC & BCC fields

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.

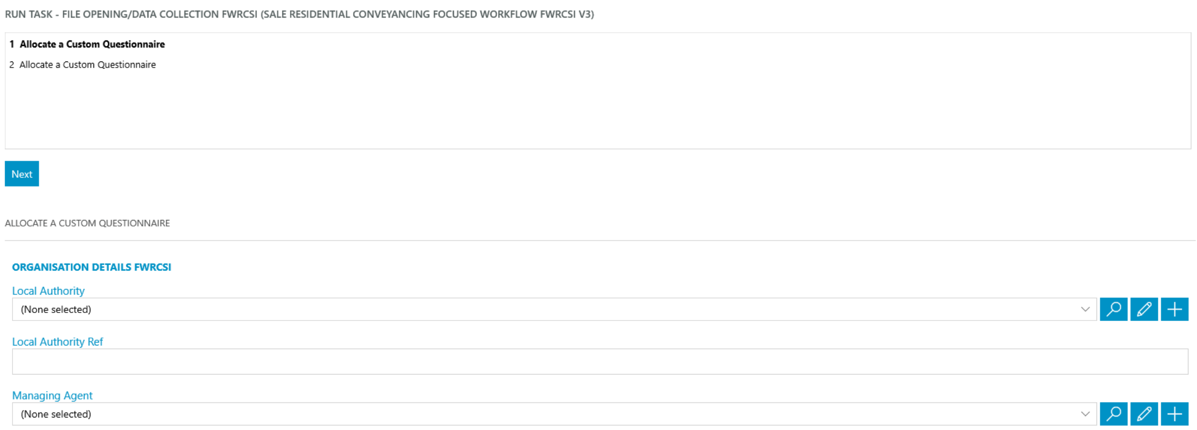
# Dossier pages – contacts add / search

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.

# 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.



# Matter permissions

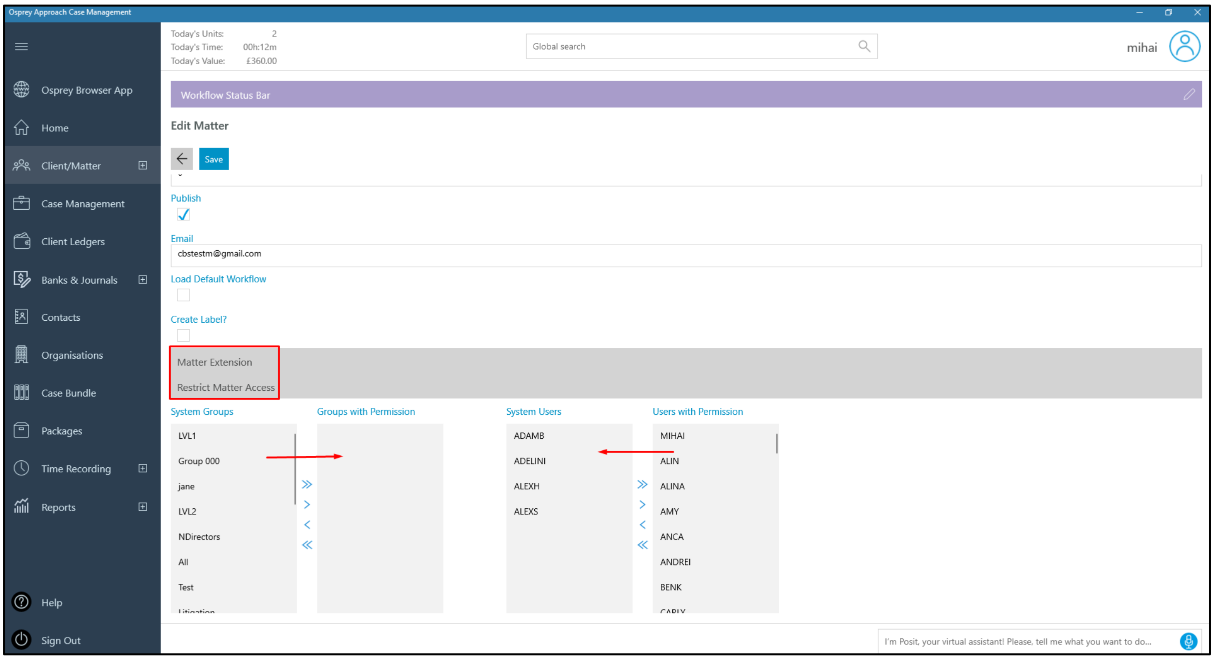
Starting with this version (v2.16.2), matter permission functionality has been added. These settings can be performed from the browser version of Osprey starting with version v1.28.0. There is now a system switch for Matter Restricted Access;

**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.



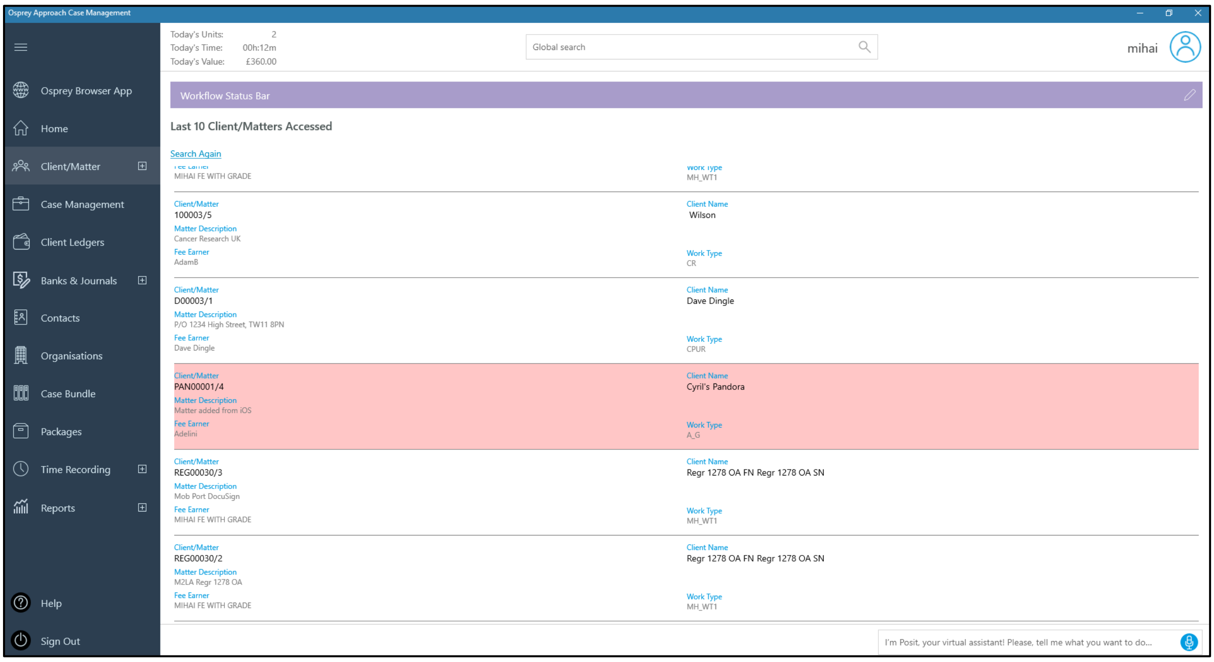

“System Users” box is designated for Users with restriction on that Matter.

“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.

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;