



Release Notes

Update: v2.18.0

Windows Case Management App



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Redirected Key Dates

Previously, redirected key dates were not visible from the home screen of Osprey.

In this update, the home screen now has a tab for redirected key dates.

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Ē	Case Management		RE0010	2	regr sn regr f	n Edited ri	Family WT (WF with	many items) Edited		08/09/2020	SEARCHFLOW	note 1	•
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	Case bundle		100003	1	Wilson	Sale 6 Anfield	Road		DAN	09/08/2021	COURTDATE	Court re: Mr Jones	•
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			100003	1	Wilson	Sale 6 Anfield	Road		DAN	22/11/2021	CHASECLI	File Opened Date	•
			100003	1	Wilson	Sale 6 Anfield	Road		DAN	24/11/2021	CHASECLI	File Opened Date	•
0	Help		100003	1	Wilson	Sale 6 Anfield	Road		DAN	29/11/2021	CHASECLI	Client to return signed client care pack	•
٢	Sign Out										l'm Po	sit, your virtual assistant! Please, tell me what you war	nt to do 関

Bill Addressee

The bill addressee name field now has a new maximum of 100 characters.

Matter Description

The matter description field now has a new maximum of 255 characters.

Contact Details

Previously, when users added a new client, they were not automatically prompted to input contact details.



In this update, the app now mirrors the behaviour of the browser and will automatically open the contact detail section when creating a new client.

Contact Fields

Previously, when accessing contacts from a dossier page / custom questionnaire, the dropdown list only displayed information regarding the contact.

In this update, users will be able to see if that contact is linked to an organisation. If they are not linked to an organisation "No organisation" is displayed.



Multiline Address

Previously, when the address type was used for a dossier field, the user would have to use the pipe punctuation symbol to show different lines.

In this update, it displays as it would in the browser, showing a separate box for each line of the address.



Osprey Approach Case Management				– ø ×
=	Today's Units: 482 Today's Time: 49h:42m Today's Value: £5430.00	Global search	С	mihai 🚫
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Add New Individual	Addr_Copy_from_correspondence _address h wcm a wcm pt wcm c wcm pc wcm	_	Addr_Cpy_frm_to_ correspondence_addre	:55
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Label Printing				
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Organisations		County c wcm Postcode		
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() Time Recording				
uu Renorts				
				I'm Posit, your virtual assistant! Please, tell me what you want to do

Expert Type Filter

Users can now filter documents by expert type within the app. The expert type box is added for standard, pdf and excel templates.

Osprey			
=		Today's Units: 0 Today's Time: 000:50m Today's Nate: 10.00	a mihai
۲	Osprey Browser App	Workflow Status Bar	l l
ŵ		Document Production - REG01283/1 (reg1283sn reg1283fn/M1Pregr1283 ed) FE: MH GRD WT: MH_	NT1
æ	Client/Matter 🗉	R Change Client/Matter 🖂 Email 烙 Conflict of Interest 🕞 Enable Client Web Access 🗒 Send SMS 🖻 Do	ument Production
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Ô	Client Ledgers	Search Description Search	
\$	Banks & Journals 🗄	Include Global	
R		MS WS Acc Tweek Work type - MH_WT1	
凲	Organisations		
100	Case Bundle		
•	Packages		
0	Time Recording 🔳		
۵Ŵ	Reports 🗉		
•	Help		
٢			I'm Posit, your virtual assistant! Please, tell me what you want to do



Exported Email Content

Previously, some emails exported to Osprey using the Outlook connector were not available to print from the app.

In this update, this feature functions as expected.

Matter History Folders

When saving a document into Osprey, the matter history folders (in the save pop-up window) will now display in alphabetical order.

Osprey Approach Case Management			- 0 ×
=	Today's Units: 0 Today's Time: 00h:00m Today's Value: £0.00	Global search Q	mihai 🔗
Osprey Browser App	Workflow Status Bar		l l
∩் Home	Edit Matter History Metadata - REG01283/1 (reg1283sn reg1283fn/1	/1Pregr1283 ed) FE: MH GRD WT: MH_WT1	
📯 Client/Matter 🖽	← Save		
Case Management	Client REG01283		9,
Client Ledgers	Matter 1		V Global
💱 Banks & Journals 🖽	Load Client		
A Contacts	Folder 🗠 🗅 Matter History		
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Case Bundle	> _ 0_Test		
Packages	Please select		~
🕚 Time Recording 🔳	Outlook imported e-mail -RTF		
íííí Reports ⊡			
	Retention Period		×
	Processed Date		
() Help	25/05/2022		
Sign Out			I'm Posit. your virtual assistant! Please. tell me what you want to do 😢

Case Management redirect

Previously, when users clicked Case Management from the navigation menu within the app, the first screen displayed was Key Dates.

In this update, when Case Management is clicked, it takes users to the matter history to mirror the web browser.



Add Client

A new shortcut has been added to the left-hand side navigation menu, under the Client / Matter section, for users to add a new client.

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õ	Client Ledgers		XCO	00001	1	X Co	N	/H 1 Matter wq	2		MH GR	D		7		30/09/2021	•
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~~.			тоос	11	1	Tkrcs sn Tkrcs fn Tkrcs	Tkrcs 1	Р			MH GRD	18/08/2017	ANTIC_COM	Anticipate	d Completion D	ate	•
aint	Reports	Ð											I'm Posit, you	r virtual assista	nt! Please, tell me	what you want t	o do 👲

Email Forwarding

Previously, the case management app did not offer the option to forward an email from the matter history.

In this update, this functionality has been added.



Osprey.	Approach Case Management										- 0 ×			
=		Too Too Too	day's Units: 0 day's Time: 00h:00m day's Value: £0.00				Global search		Q		mihai 🚫			
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**	Client/Matter 🗉		Rechange Client/Matter 🖂 Email 😤 Conflict of Interest 💪 Enable Client Web Access 🗒 Send SMS 🖻 Document Production											
Ē		+	+ Add Document + Add Note 🗈 Request Signature (DocuSign) 🗋 Global											
Ĩ	Client Ledgers		🕒 In Tray Items	TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	MATTER DESCRIPTION RETENTION PERIOD	DETAILS	CREATED DATE			
<u>ি</u>	Banks & Journals II	, ~	/ 🛗 Matter History		93834	reg01283	reg1283sn	1	M1Pregr1283 ed	Mihai Excel Template 1 - wf ie11.xls	25/05/2022			
-0		-	> 🗀 0_Adelini		93833	reg01283	reg1283sn	1	M1Pregr1283 ed	Outlook imported e-mail - cc	25/05/2022			
*	Contacts		> 🗋 0_Adelini		93832	reg01283	reg1283sn	1	M1Pregr12 Reply	Outlook imported e-mail - RTF3 rich	25/05/2022			
_			> 🗀 0_Test		93831	reg01283	reg1283sn	1	M1Preor1	Outlook imported e-mail -RTF	25/05/2022			
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0	Time Recording L	5	> 14_08_regression	Ľ	93683	REG01283	reg1283sn	1	M1Pregr1283 ed	Meeting note	17/05/2022			
á	Reports 🗄	3	> 24_07Regression		93682	REG01283	reg1283sn	1	M1Pregr1283 ed	Meeting note	17/05/2022			
			ChrisF		93681	REG01283	reg1283sn	1	M1Pregr1283 ed	Meeting note	17/05/2022			
			Client Correspondence		93680	REG01283	reg1283sn	1	M1Pregr1283 ed	Meeting note	17/05/2022			
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0	Help		🗀 Dan	D	93678	REG01283	reg1283sn	1	M1Pregr1283 ed	Meeting note	17/05/2022			
			🗀 davis											
٢	Sign Out								1	'm Posit, your virtual assistant! Please, tell me what you war	nt to do 🚯			

Archived Matter Search Results

When searching for a client, users can now see at a glance from the search results, whether the client is archived or not.

Osprey Approach Case Management			– a ×
=	Today's Units: 0 Today's Time: 00h:00m Today's Value: £0.00	Global search Q	mihai 🚫
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☆ Home	Search Results Include Archives Include Propsects		
۶९९ Client/Matter ⊞	Search Again Leasure rayns Fee Farmer	res Wark Tune	
Case Management	Chris Leek 	DEBT VP	
Client Ledgers	T00042/1 Matter Description Ensure rights	Archived Yes	
🕏 Banks & Journals 🖽	Fee Earner Adam8	Work Type GLOBAL	
Contacts	Client/Matter T00042/2 Matter Description	Client Name Archived	
Organisations	Erszure rights Fee Earner Adam8	Ves Work Type ADMLAW	
Case Bundle	Client/Matter V0000001/1	Client Name	
Packages	Matter Uescoption Default Matter Fee Earner Adam®	Archned No Work Type	
🕓 Time Recording 🛛 🖽	Client/Matter V000001/2	Client Name	
📶 Reports 🗉 🖽	Matter Description Y Fee Earner	Archived No Work Type	
	Audanteo	-' Client Name	
	Matter Description Ensure rights Fee Famer	Archived Yes Work Tune	
	Rich Wood	CONPUR	
🕐 Sign Out			I'm Posit, your virtual assistant! Please, tell me what you want to do 🚯



Archived / Prospect clients in search

Previously, users were not able to filter archived/prospect clients when carrying out searches.

In this update, after the search results are displayed, users can tick to include archives and / or prospects.

ospicy reproteir ease management			
=	Today's Units: 0 Today's Time: 00h:00m Today's Value: £0.00	Global search C	mihai 🔗
Osprey Browser App	Workflow Status Bar		0
ப்பி Home	Search Results 🖌 Include Archives 🖌 Include Propsects		
📯 Client/Matter 🖽	Search Aqain Client/Matter	Client Name	
Case Management	REGO001/1 Matter Description Erssure rights	Archived Ves	
Client Ledgers	Fee Earner MIHAI FE NO GRADE	Work Type MH_WT2	
🛐 Banks & Journals 🖽	Client/Matter REG0003/1 Matter Description regr 121 6	Client Name ac01 fn ac01 sn Archived No	
Contacts	Fee Earner MIHAI FE WITH GRADE	Work Type MH_WT1	
Organisations	Client/Matter RES00004/1	Client Name act reg co 1	
Case Bundle	milling co 1 Fee Earner Milliau FE WITH GRADE	No Work Type MH_WT1	
Packages	Client/Matter REG00004/2	Client Name ac1 reg co 1	
🕔 Time Recording 🖽	Matter Description m2 reg co 1 Fee famer MIHAI FE WITH GRADE	Archived No Work Type MH_WT2	
iiii Reports 🗉	Client/Matter REG00028/1 Matter/Description	Client Name AC1Q 1276 FN AC1Q 1276 SN Archived	
	M1 P 1276 Fee Earner MIHAI FE WITH GRADE	No Work Type MH_WT1	
Help	Client/Matter REG00028/2	Client Name AC1Q 1276 FN AC1Q 1276 SN	
Sign Out			I'm Posit, your virtual assistant! Please, tell me what you want to do

Matter History Folder when emailing

Users can now designate a matter history folder, to save an email to, when sending an email via the case management app.



Osprey Approach Case Management				– ø ×
=	Today' Unitz 0 Today' Time 00h00m Global search C Oday's Value £0.00			mihai 🔗
Osprey Browser App	Workflow Status Bar			ĺ
ப் Home	Compose Email			
۶९९ Client/Matter ⊡	← Û Û A Template (none) ☐ High Importance Create Message For Client Attach Attach Form Matter History Signature			
Case Management	From cbstesto@outlook.com (Fee Earner)			→ M Send
Client Ledgers	To Cc			•••
🕏 Banks & Journals 🖽	Bcc			
Contacts	Subject Email Regarding Case: M1Pregr1283 ed			
Organisations	Folder > Co_Adeini			
Case Bundle	Description			
Packages	Body		B	/ U
🕚 Time Recording 🛛 🖽				
₩ Reports 🖽	Have a nice day,			
O Help	Signature			
U Sign Out		I'm Posit, your virtu	al assistant! Please, tell me wh	nat you want to do 関

Email Details

In this update users can now add a description for an email before sending it. This description is what will appear in the matter history.

Osprey Approac	ach Case Management								-	o x
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🛠 Clier	ent/Matter 🗄	← Û Attach Att	tach From Matter History Signature	Template (none) \lor	High Importance	Create Message For Client				
🖆 Case		From	cbstesto@outlook.com (Fee Earner)						~	E Sand
Clier	ent Ledgers	To Cc							***	aenu
🖏 Bank	nks & Journals 🗉	Bcc								
R Cont	ntacts	Subject	Email Regarding Case: M1Pregr1283 ed							
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Case	e Bundle	Description	email item description							
Pack	kages	Body					■ ©		B / L	<u>)</u>
🕚 Time	ne Recording 🛛 🕀									
iiii Repo	ports 🖽	Have a nic	ce day,							
Help	Þ	Sa	grature_							
🕐 Sign							I'm Posit, your virtua	l assistantl Please, tell	me what you want to do	👲



Duplicating attachments with emails

Previously, if users were to attach an existing item from the matter history to an email, it would save that item separately creating duplication.

In this update, if the attachment already exists, it is not duplicated.

Web-enable emails

Users can now web-enable emails from the case management app.

Global Matter History

A checkbox has been added, when viewing the matter history, to enable the global matter history to be accessed from the app.

Osprey	Approach Case Management											- a ×		
			Today's Units: 0 Today's Time: 00h:00m Today's Value: £0.00				Global search				mihai 🔗			
٢			Workflow Status Bar											
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**	Client/Matter	Ħ	R: Change Client/Matter 🖂 Email 🎭 Conflict of Interest 💪 Enable Client Web Access 🗍 Send SMS 🖻 Document Production											
Ē			+ Add Document + Add Note	+ Add Document + Add Note D Request Signature (DocuSign Global Search										
Ô	Client Ledgers		🖾 In Tray Items	TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	MATTER DESCRIPTION	RETENTION PERIOD	DETAILS	CREATED DATE		
5/	Banks & Journals	Ħ	🗸 💾 Matter History	-	93836	REG01283	reg1283sn	1	M1Pregr1283 ed		MH attachment (Mihai Excel Template)	26/05/2022		
			> C 0_Adelini		93835	REG01283	reg1283sn	1	M1Pregr1283 ed		email item description	26/05/2022		
			> C 0_Adelini	-	93834	reg01283	reg1283sn	1	M1Pregr1283 ed		Mihai Excel Template 1 - wf ie11.xls	25/05/2022		
m	Organisations		> C 0_lest		93833	reg01283	reg1283sn	1	M1Pregr1283 ed		Outlook imported e-mail - cc	25/05/2022		
			> 0000		93832	reg01283	reg1283sn	1	M1Pregr1283 ed		Outlook imported e-mail - RTF3 rich	25/05/2022		
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ē	Packagar		> 🗀 1 Folder		93824	REG01283	reg1283sn	1	M1Pregr1283 ed		Cheque Requisition Slip - Client Payment Received	24/05/2022		
			> 🗀 1_20_1		93823	REG01283	reg1283sn	1	M1Pregr1283 ed		Cheque Requisition Slip - Client Cheque Received	24/05/2022		
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			Client Correspondence		93682	REG01283	reg1283sn	1	M1Pregr1283 ed		Meeting note	17/05/2022		
			> 🗀 Cris		93681	REG01283	reg1283sn	1	M1Pregr1283 ed		Meeting note	17/05/2022		
0	Help		🗀 Dan		93680	REG01283	reg1283sn	1	M1Pregr1283 ed		Meeting note	17/05/2022		
			🗀 davis											
C										1	'm Posit, your virtual assistant! Please, tell me what you war	nt to do 🚯		



InfoTrack labels

Previously, when using the conveyancing app, the labels on the InfoTrack form led users to believe it was not applicable for certain work types e.g. Re-mortgage.

In this update, the labels have been updated.

Deprey Approach Case Management Conveyancing – J X										
=		Today's Units: 0 Today's Time: 00h:00m Today's Value: £0.00		Global search	۹	mihai 🚫				
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×	Client/Matter 🗉	Purchase Price Exchange Date select a date								
Ē	Case Management	Settlement Date select a date	Settlement date	confirmed?						
ŕ	Client Ledgers	✓ PURCHASER/TRANSFEREE/PARTIES TO REMO	ORTGAGE DETAILS							
\$	Banks & Journals 🛛 📧	Title Second Name	Forename reg1 National Insurance Numt	1283fn Surname Date Of Birth	select a date 📖					
8	Contacts	Phone	Email							
A	Organisations	Company Name								
	Case Bundle	Address Building Name	Street Number	Street Name						
•	Packages	Town	County	Post Code						
1	Searchflow	Street Address								
•••	InfoTrack	SECOND PURCHASER/TRANSFEREE/PARTIES	TO REMORTGAGE DETAILS							
•••*		Title	Forename	Surname						
*	Coadjute 🗄	Second Name	National Insurance Numb	Date Of Birth	select a date					
\frown		Phone	Email							
?	Help	Company Name								
٢	Sign Out					I'm Posit, your virtual assistant! Please, tell me what you want to do 🕘				

Matter History Folders

Previously, it was not possible to modify the matter history folders from within the app.

In this update, users can modify the matter history folders with the same options as the web browser.





Saving Bills

Previously, if a bill was saved on the PC, Osprey would show that there was already a document open for editing.

In this update, this no longer happens, and it functions as expected.

Matter Restrictions Switch

Previously, newly added users were automatically restricted from certain files.

In this update, there is a new switch located in Client / Matter > Edit Matter.



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uu Reports ा	Enable Matter Access Restriction			
			I'm Posit, your virtual assistant! Please, tell m	e what you want to do 🚇

The checkbox is unticked by default. If the matter is saved with this unticked, no restrictions are applied. Newly added users are no longer restricted to matters that had previously been edited.

After this checkbox has been ticked, the user will be met with a confirmation to confirm and select 'ok'.

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At this point, access can be granted to users / groups for this matter.



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If this box was to be unticked, there would be another confirmation box.

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Case Management	Review Date 31/05/2022 Review Type	Warning Are you sure you want to disable Matter Access Restriction? All users will be able		
Client Ledgers	(None)	to access the matter.		
🖏 Banks & Journals 🗉	0	Ok Cancel		
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Organisations	Email			
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Cil Barrato D	Enable Matter Access Restriction			
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The Matter Restriction Audit for Osprey Approach Browser version (Reports > Miscellaneous Reports), records enabling and disabling matter restrictions.



Go Live

Previously, the app did not have a way of turning clients from prospects to live clients as the browser did.

In this update, there is a Go Live button to mirror the browser.



Addition of Integrations

Previously, users who wanted to access Osprey integrations - such as Searchflow, InfoTrack, and Coadjuate - needed to open the conveyancing version of the app.

In this update, these integrations are brought into the general app, giving users the option of having these integrations in this version.



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Packages

In this update, users now can now remove the item reference number prefix from items added to a package.

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_				93382	0000002	Jones	2	Default Matter		Client 0000002: Matter 2: Arc	hived by chelsea. Ref	26/05/2022	chelsea	
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True:

Name

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61454_Address Lines Test

False:

Name

Address Lines Test

- Client Care Letter FW_DR
- Client Due Diligence Results FW_DR