



# Release Notes

Update: v2.15.2

Windows Case Management App

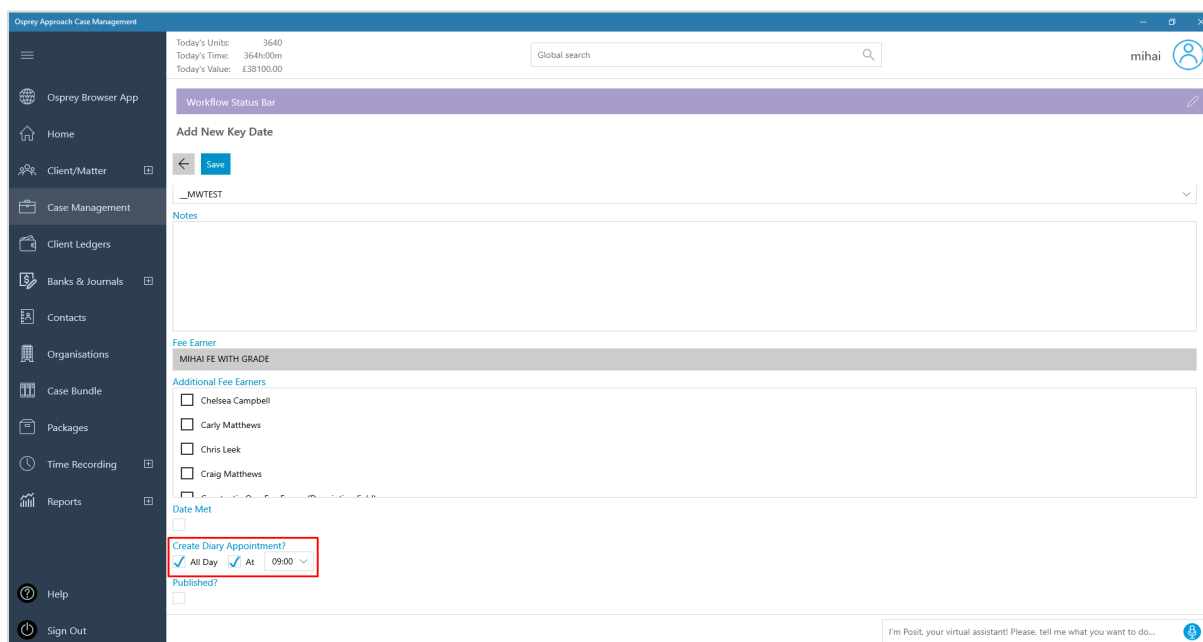
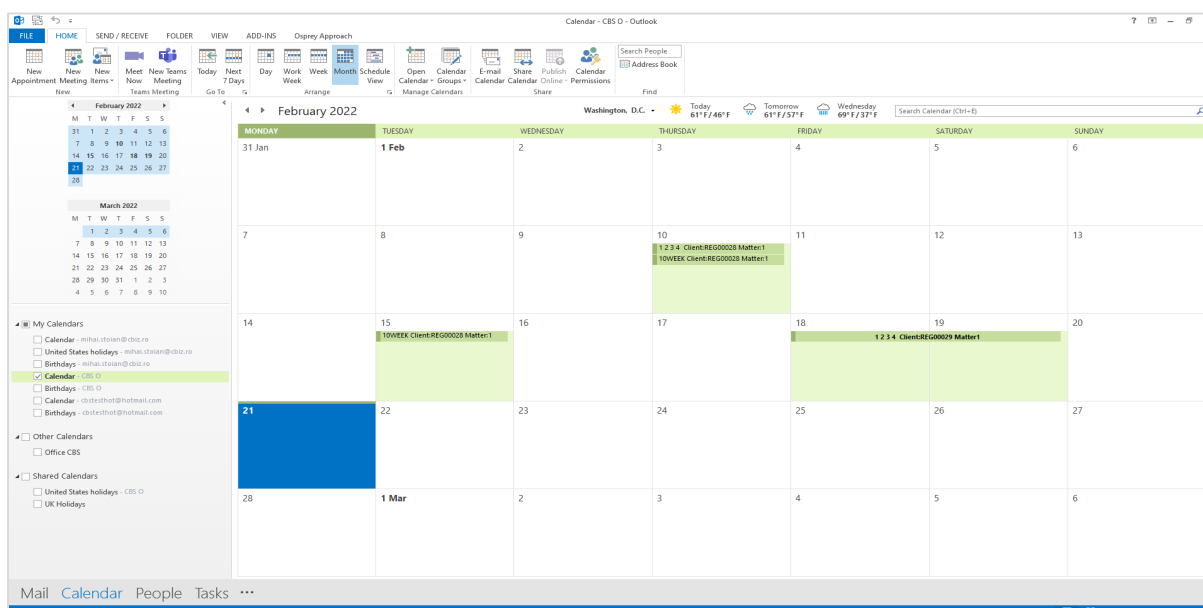
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# Key dates populating in Outlook

Previously, if users were to select "Create diary appointment", the key dates would not appear in their Outlook calendar.

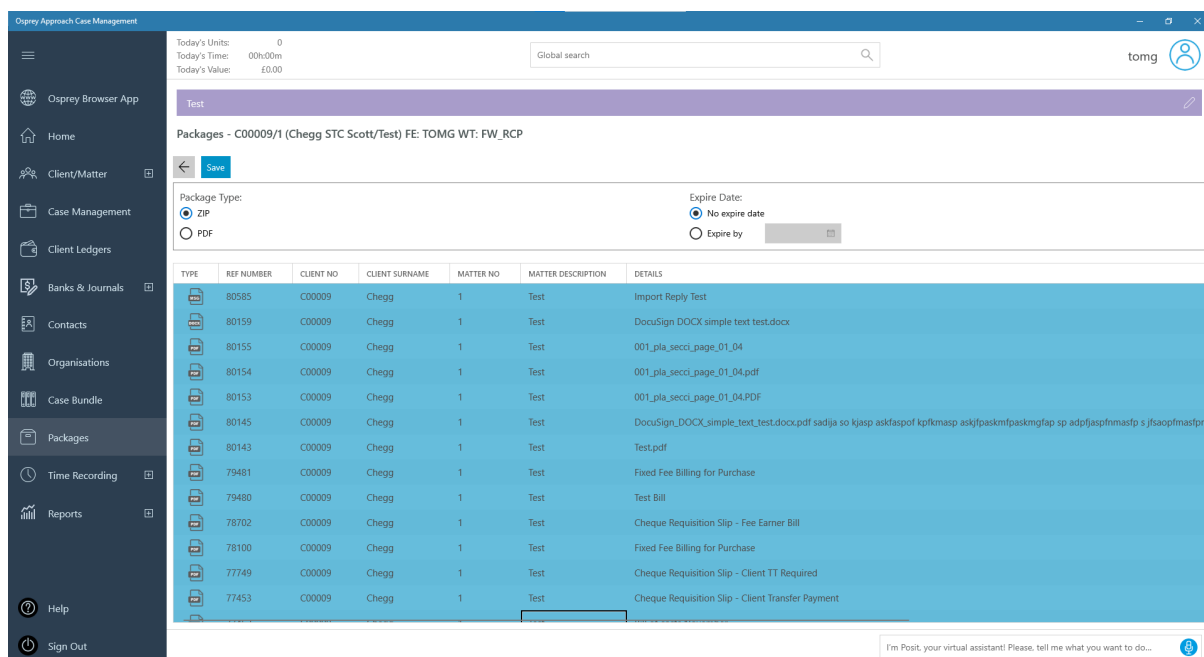
In this update, this functionality works as expected, and key dates appear in Outlook.

# Package item limit

Previously, packages were limited to 200 items, but we received feedback that this still wasn't enough.

In this update, packages can now be created with an unlimited amount of items, however size limits still apply.



The screenshot shows the 'Osprey Approach Case Management' application. The top navigation bar includes a search bar, a user profile icon labeled 'tomg', and a 'Test' button. The left sidebar contains a menu with options: Osprey Browser App, Home, Client/Matter, Case Management, Client Ledgers, Banks & Journals, Contacts, Organisations, Case Bundle, Packages (selected), Time Recording, Reports, Help, and Sign Out.

The main content area displays 'Packages - C00009/1 (Chegg STC Scott/Test) FE: TOMG WT: FW\_RCP'. Below this, there are settings for 'Package Type' (ZIP selected, PDF unselected) and 'Expire Date' (No expire date selected, Expire by unselected). A table lists the package items:

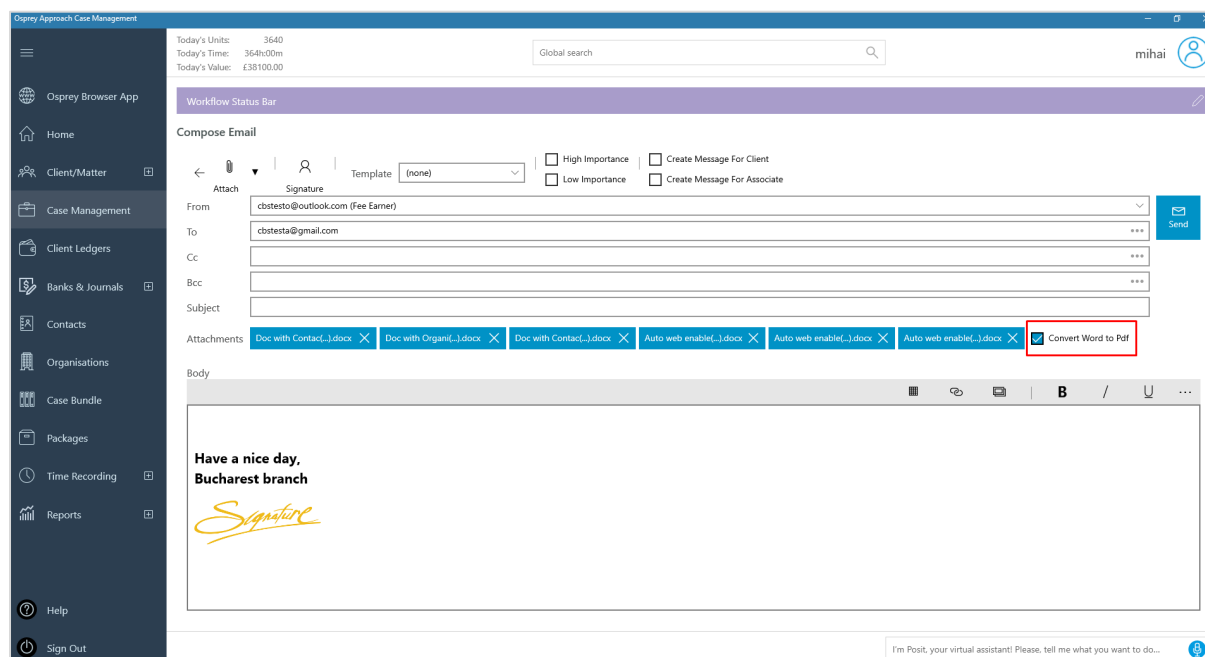
TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	MATTER DESCRIPTION	DETAILS
Test	80585	C00009	Chegg	1	Test	Import Reply Test
Test	80159	C00009	Chegg	1	Test	DocuSign DOCK simple test test.docx
Test	80155	C00009	Chegg	1	Test	001_pla_secci_page_01_04
Test	80154	C00009	Chegg	1	Test	001_pla_secci_page_01_04.pdf
Test	80153	C00009	Chegg	1	Test	001_pla_secci_page_01_04.PDF
Test	80145	C00009	Chegg	1	Test	DocuSign DOCK simple test test.docx.pdf sadja so kjas askaspo kpfkmap askjfpaskmpaskmgfap sp adpfjaspfmasp s/jsaopfmasp
Test	80143	C00009	Chegg	1	Test	Test.pdf
Test	79481	C00009	Chegg	1	Test	Fixed Fee Billing for Purchase
Test	79480	C00009	Chegg	1	Test	Test Bill
Test	78702	C00009	Chegg	1	Test	Cheque Requisition Slip - Fee Earner Bill
Test	78100	C00009	Chegg	1	Test	Fixed Fee Billing for Purchase
Test	77749	C00009	Chegg	1	Test	Cheque Requisition Slip - Client TT Required
Test	77453	C00009	Chegg	1	Test	Cheque Requisition Slip - Client Transfer Payment

At the bottom right, there is a chatbot icon with the text: 'I'm Posit, your virtual assistant! Please, tell me what you want to do...'.

# Email – Convert to PDF

Previously, the functionality to convert Word documents to PDF documents, was not present in the app.

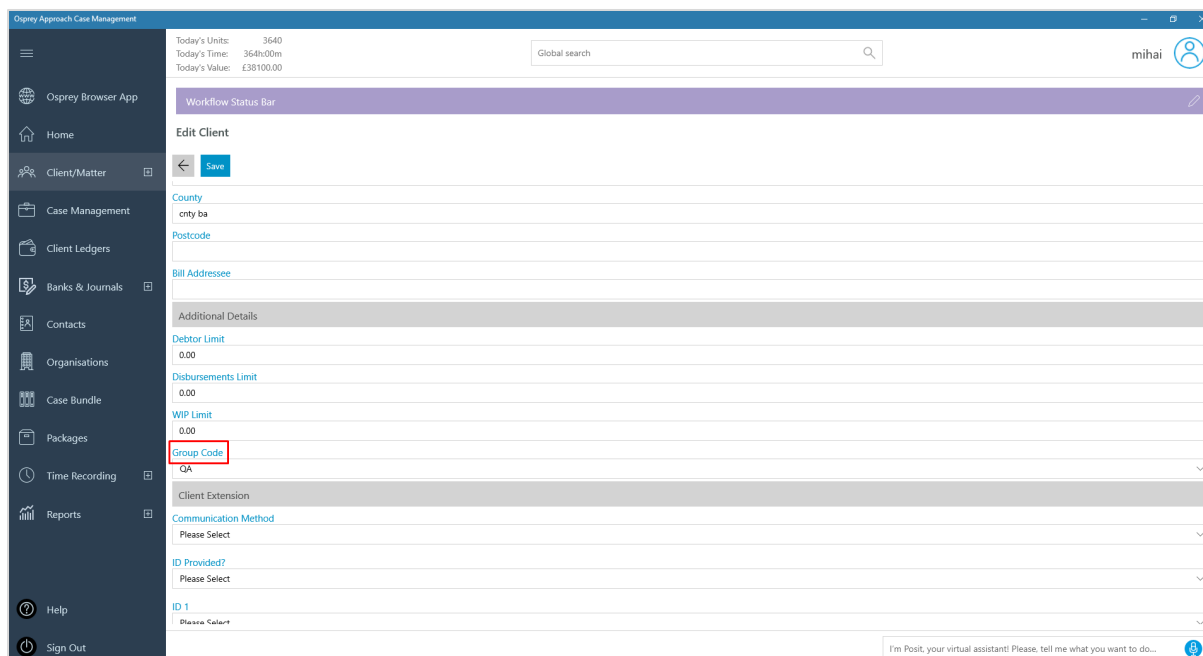
In this update, this functionality has been added.



Please note, if the item is not a Word document, the checkbox will be disabled.

# Group Code

You can now assign a group code to a client from the app.



The screenshot shows the 'Osprey Approach Case Management' application interface. On the left is a dark sidebar with navigation icons and labels: 'Osprey Browser App', 'Home', 'Client/Matter', 'Case Management', 'Client Ledgers', 'Banks & Journals', 'Contacts', 'Organisations', 'Case Bundle', 'Packages', 'Time Recording', 'Reports', 'Help', and 'Sign Out'. The main area is titled 'Edit Client' and contains several form fields. At the top, it shows 'Today's Units: 3640', 'Today's Time: 364h:00m', and 'Today's Value: £38100.00'. Below this is a 'Global search' bar and a user profile for 'mihai'. The form fields include 'County' (containing 'cnty ba'), 'Postcode', 'Bill Addressee', 'Additional Details', 'Debtor Limit' (0.00), 'Disbursements Limit' (0.00), 'WIP Limit' (0.00), 'Group Code' (containing 'QA' and highlighted with a red box), 'Client Extension', 'Communication Method' (Please Select), 'ID Provided?' (Please Select), and 'ID 1' (Please Select). At the bottom right, there is a chatbot icon and the text 'I'm Posit, your virtual assistant! Please, tell me what you want to do...'.

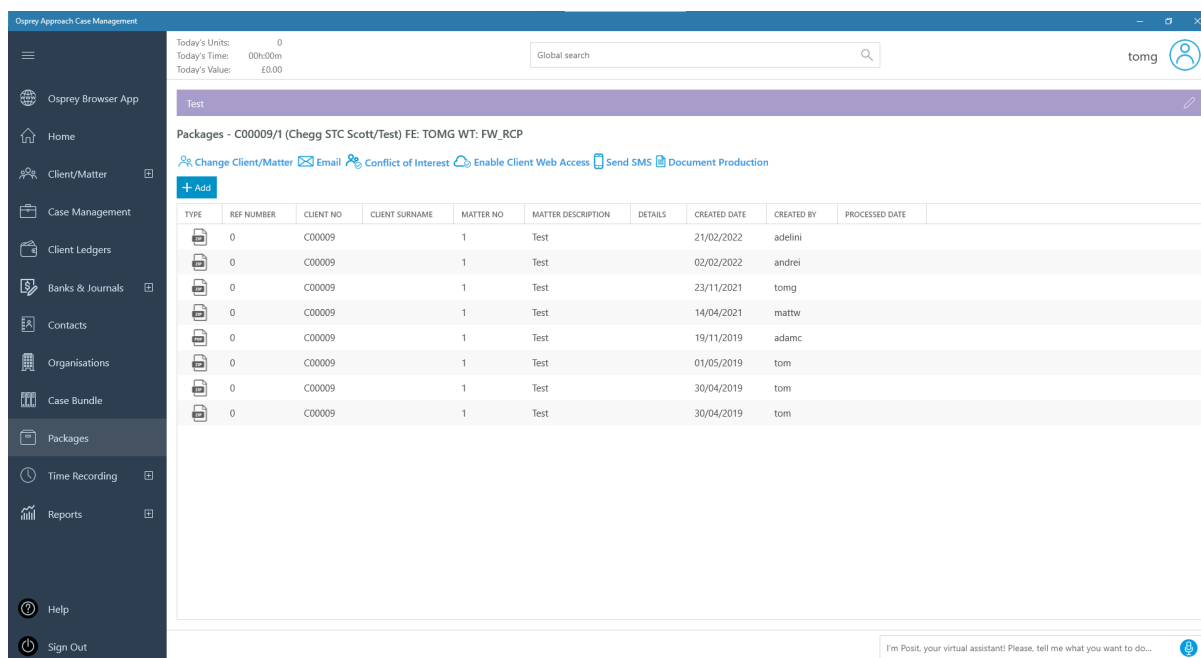
## Multiple Word documents open

Previously, if you were producing a document through Osprey and then opened another unrelated Word document and subsequently closed that document, it would close both and save the wrong item into Osprey.

This error has been fixed in this update. Now, when you close the second document, only this item closes, meaning you can save the Osprey produced document as normal.

# View packages created by others

You can now view all packages created by all users.



The screenshot displays the Osprey Approach Case Management application interface. The left sidebar contains navigation links: Osprey Browser App, Home, Client/Matter, Case Management, Client Ledgers, Banks & Journals, Contacts, Organisations, Case Bundle, Packages (selected), Time Recording, Reports, Help, and Sign Out. The main content area shows the 'Packages' section for 'C00009/1 (Chegg STC Scott/Test) FE: TOMG WT: FW\_RCP'. It includes a search bar with 'Test' entered, a '+ Add' button, and a table of packages.

TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	MATTER DESCRIPTION	DETAILS	CREATED DATE	CREATED BY	PROCESSED DATE
	0	C00009		1	Test		21/02/2022	adelini	
	0	C00009		1	Test		02/02/2022	andrei	
	0	C00009		1	Test		23/11/2021	tomg	
	0	C00009		1	Test		14/04/2021	matth	
	0	C00009		1	Test		19/11/2019	adamc	
	0	C00009		1	Test		01/05/2019	tom	
	0	C00009		1	Test		30/04/2019	tom	
	0	C00009		1	Test		30/04/2019	tom	

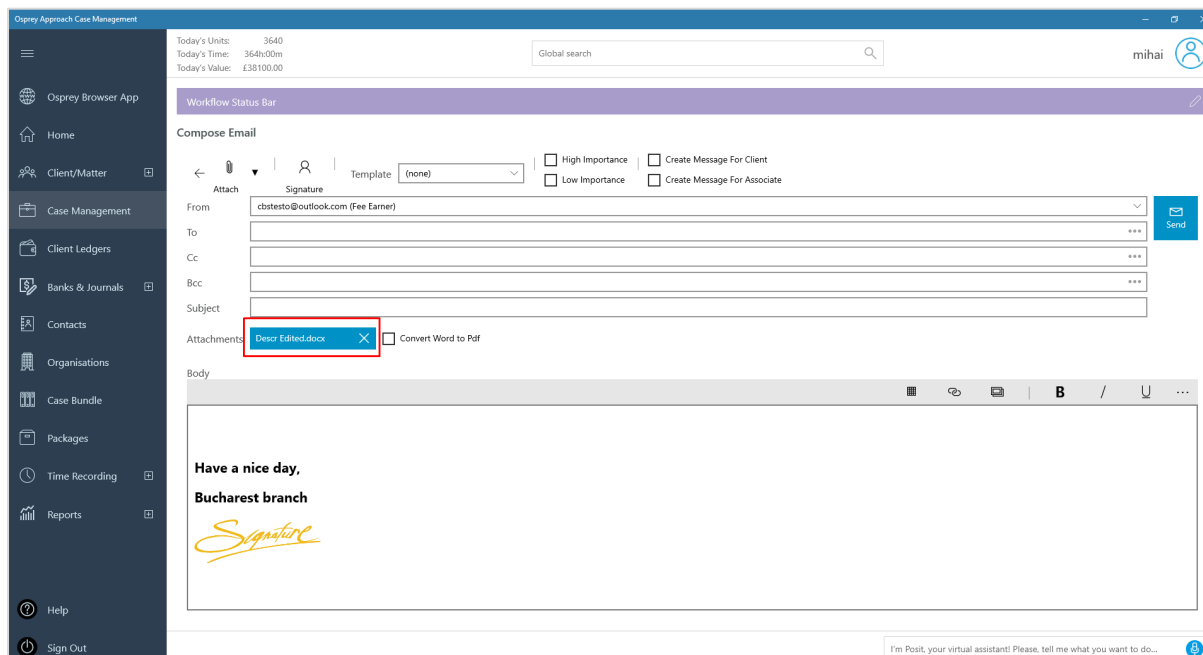
At the bottom right, there is a chatbot prompt: "I'm Posit, your virtual assistant! Please, tell me what you want to do..."



# Renaming files

Previously, if users were to rename an item in the matter history, when attaching that item in an email, it would use the old name.

This has now been updated so the attachment shows with the correct name.



# Details column in the Matter History

Previously, the details column would increase its width when it encountered a longer description, meaning that other columns might be pushed off the screen.

In this update, the details column is stable.

KEYDATES
DOCUMENTS
WORKFLOWS

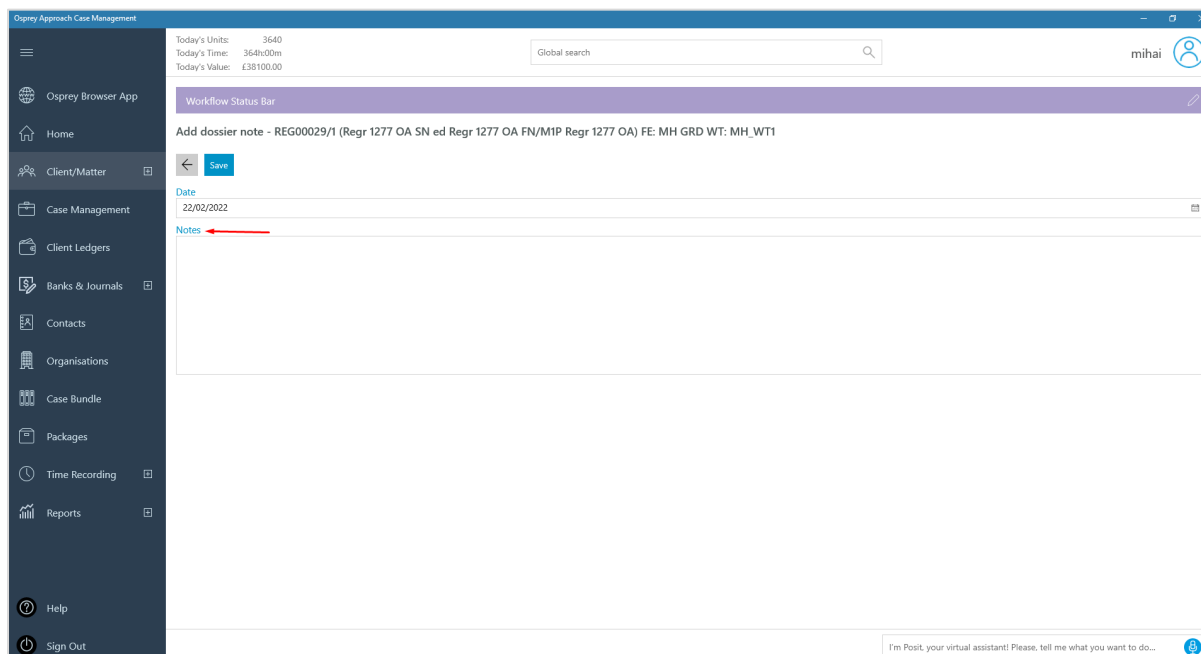
+ Add Document
+ Add Note
Request Signature (DocuSign)

In Tray Items
Signature Requests
Matter History
0\_Adellini
0\_Adellini
0\_Test
00 Folder
0000
0000NEW
1 Folder
1\_20\_1
123 folder
14\_08\_regression
24\_07Regression
ChrisF
Client Correspondence
Cris

TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	DETAILS
	80824	PAN00001	Pandora's	1	Letter.htm.doc
	80819	PAN00001	Pandora's	1	Sent e-mail (Subject: Correspondence from Osprey ...
	80823	PAN00001	Pandora's	1	Letter.htm.doc
	80816	PAN00001	Pandora's	1	Sent e-mail (Subject: Correspondence from Osprey ...
	80815	PAN00001	Pandora's	1	Sent e-mail (Subject: Correspondence from Osprey ...
	80821	PAN00001	Pandora's	1	Letter.htm.doc
	80814	PAN00001	Pandora's	1	Sent e-mail (Subject: Correspondence from Osprey ...
	80822	PAN00001	Pandora's	1	Letter.htm.doc
	80812	PAN00001	Pandora's	1	Sent e-mail (Subject: Correspondence from Osprey ...
	80820	PAN00001	Pandora's	1	Letter.htm.doc
	80813	PAN00001	Pandora's	1	Sent e-mail (Subject: Correspondence from Osprey ...
	80818	PAN00001	Pandora's	1	Letter.htm.doc
	80811	PAN00001	Pandora's	1	Sent e-mail (Subject: Correspondence from Osprey ...
	80817	PAN00001	Pandora's	1	Letter.htm.doc

# Dossier notes length

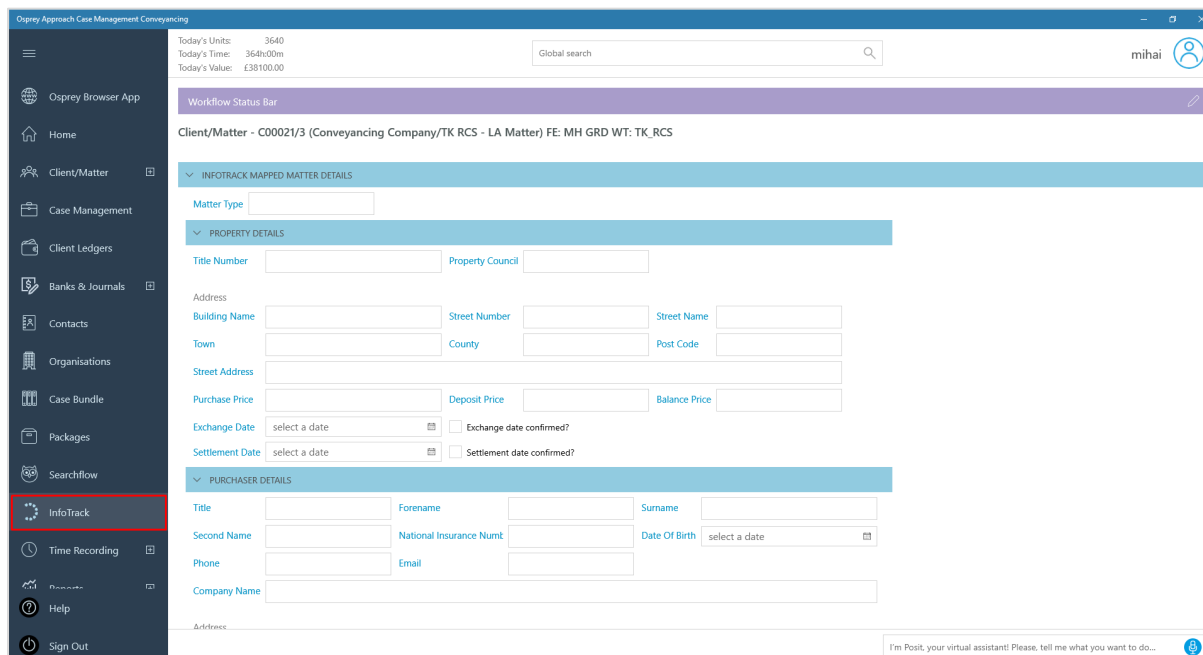
The new character limit for client level and matter level dossier notes has been raised from 256 characters to 8,000 characters.



# Infotrack dates – Conveyancing App

Previously, users might have experienced an unexpected error when not filling in the date of birth field in 'additional client details' dossier.

With this update, an unexpected error will not show if this dossier field is blank.

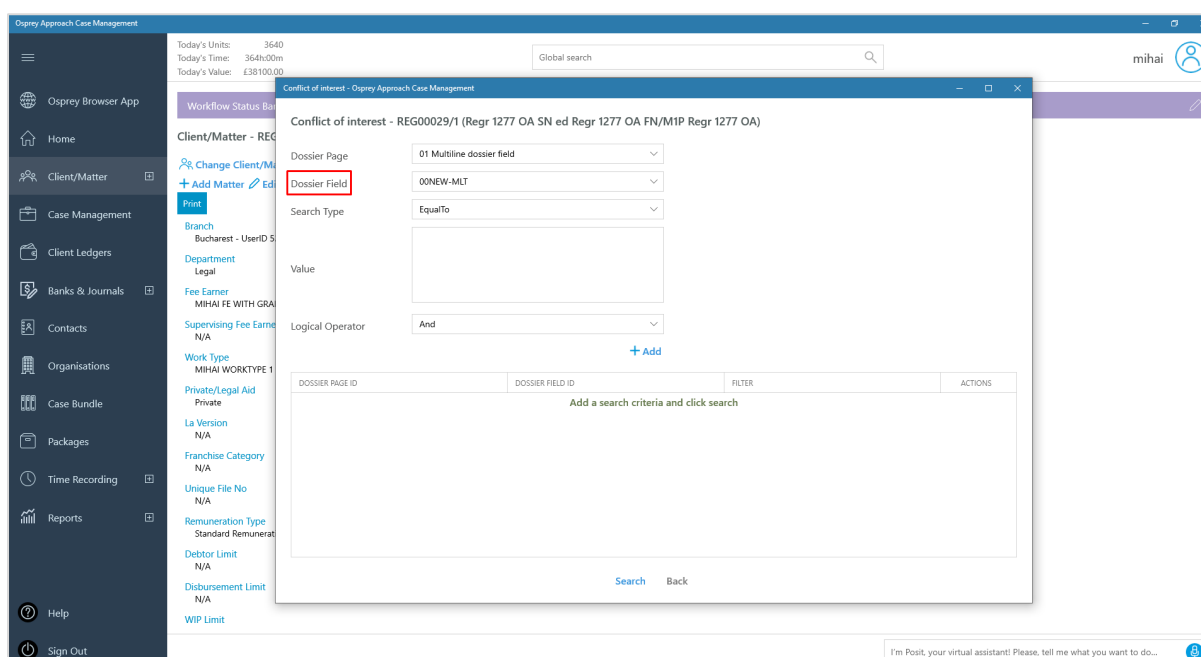


The screenshot displays the 'Osprey Approach Case Management Conveyancing' application window. The left sidebar contains a navigation menu with the following items: Home, Client/Matter, Case Management, Client Ledgers, Banks & Journals, Contacts, Organisations, Case Bundle, Packages, Searchflow, **InfoTrack** (highlighted with a red box), Time Recording, Help, and Sign Out. The main content area shows the 'Workflow Status Bar' and 'Client/Matter - C00021/3 (Conveyancing Company/TK RCS - LA Matter) FE: MH GRD WT: TK RCS'. Below this, there are three expandable sections: 'INFOTRACK MAPPED MATTER DETAILS' (containing 'Matter Type'), 'PROPERTY DETAILS' (containing fields for Title Number, Property Council, Address, Building Name, Street Number, Street Name, Town, County, Post Code, Street Address, Purchase Price, Deposit Price, Balance Price, Exchange Date, and Settlement Date), and 'PURCHASER DETAILS' (containing fields for Title, Forename, Surname, Second Name, National Insurance Numt, Date Of Birth, Phone, Email, Company Name, and Address). The 'Date Of Birth' field is currently blank. At the bottom right, there is a chatbot icon and the text 'I'm Posit, your virtual assistant! Please, tell me what you want to do...'.

# Conflict of interest searches – multi-line

Previously, when running a conflict of interest search, you could not search against multi-line dossier fields.

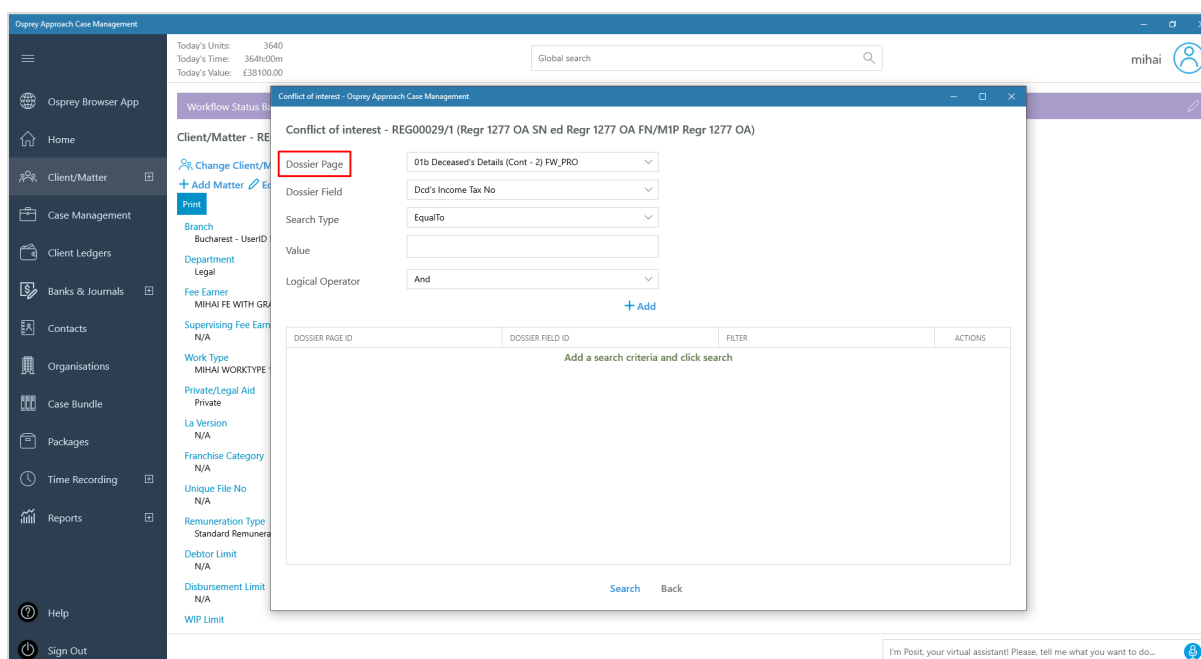
In this update, multi-line dossier fields will now appear in the dropdown list.



# Conflict of interest searches – All dossier pages

Previously, when carrying out a conflict of interest search, it would only let you select from dossier pages that are on the same work type as the client.

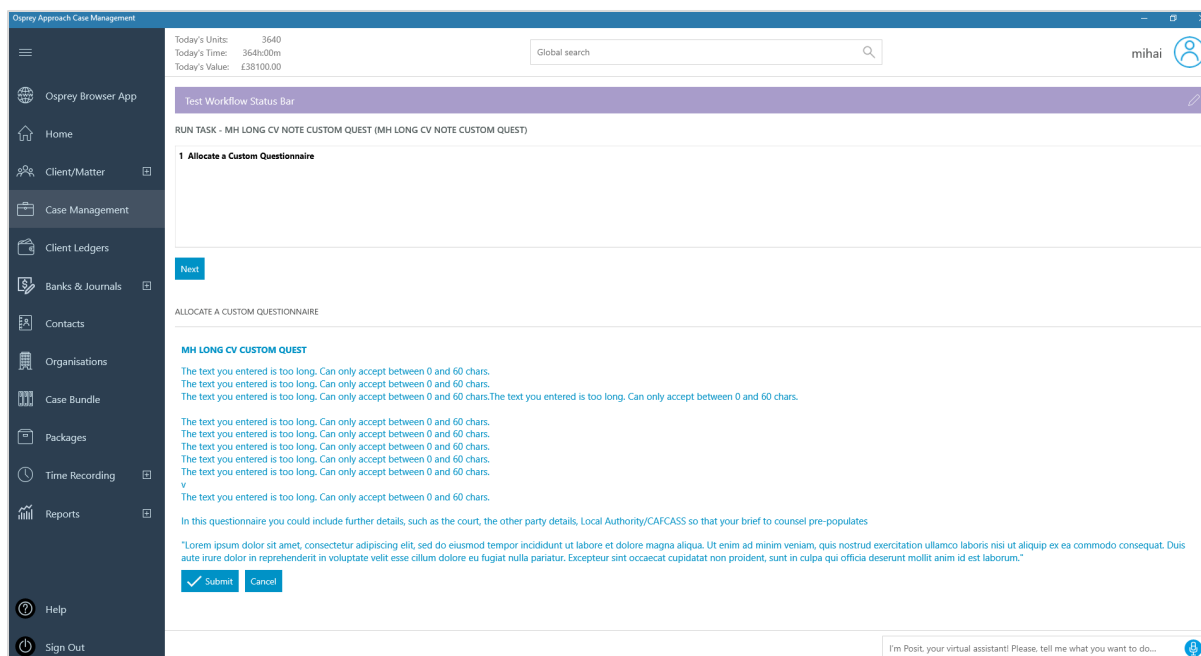
In this update, users can choose from all dossier pages, regardless of the worktype.



The screenshot displays the Osprey Approach Case Management application. A sidebar on the left contains navigation links: Osprey Browser App, Home, Client/Matter, Case Management, Client Ledgers, Banks & Journals, Contacts, Organisations, Case Bundle, Packages, Time Recording, Reports, Help, and Sign Out. The main area shows a 'Conflict of interest' search window for 'REG00029/1 (Regr 1277 OA SN ed Regr 1277 OA FN/MIP Regr 1277 OA)'. The window has a 'Dossier Page' dropdown menu, a 'Dossier Field' dropdown, a 'Search Type' dropdown, and a 'Logical Operator' dropdown. Below these is a table with columns 'DOSSIER PAGE ID', 'DOSSIER FIELD ID', 'FILTER', and 'ACTIONS'. The table contains a single row with the text 'Add a search criteria and click search'. At the bottom of the window are 'Search' and 'Back' buttons. The top of the window shows 'Today's Units: 3640', 'Today's Time: 364x00m', and 'Today's Value: £38100.00'. The user's name 'mihai' is visible in the top right corner.

# CV notes

CV notes now appear as expected when used in questionnaires within workflows.

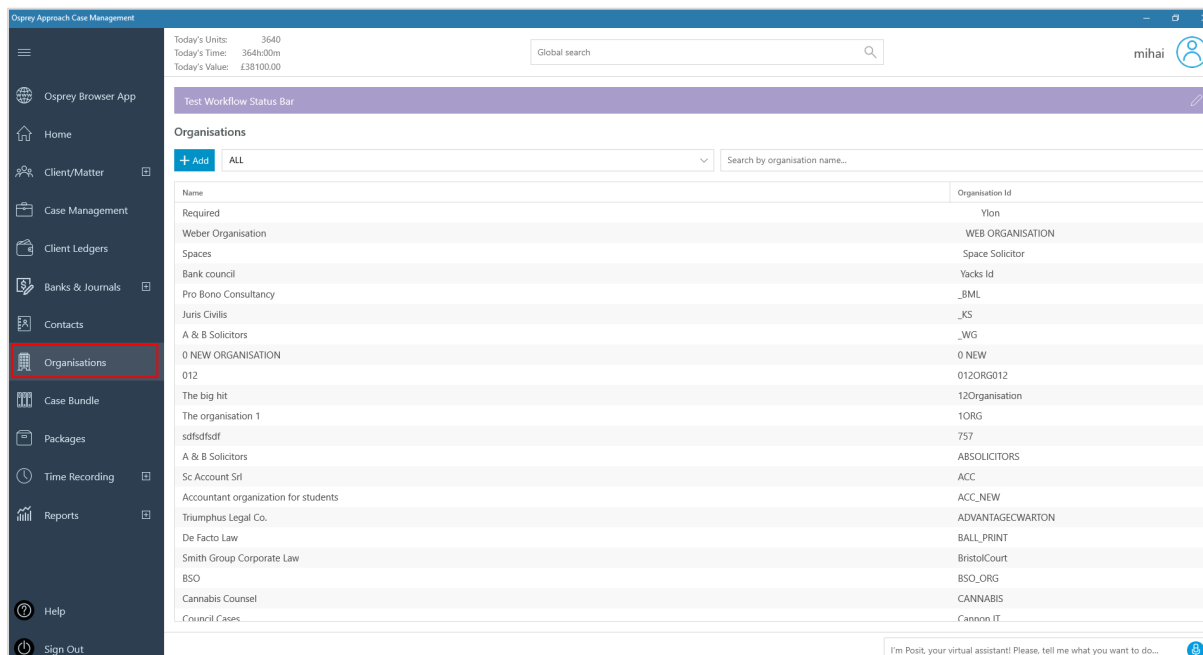


The screenshot displays the Osprey Approach Case Management application interface. On the left is a dark sidebar with navigation icons and labels: Osprey Browser App, Home, Client/Matter, Case Management (highlighted), Client Ledgers, Banks & Journals, Contacts, Organisations, Case Bundle, Packages, Time Recording, Reports, Help, and Sign Out. The top header bar shows system information: Today's Units: 3640, Today's Time: 364h:00m, Today's Value: £38100.00, a Global search bar, and the user profile 'mihai'. The main content area is titled 'Test Workflow Status Bar' and contains a task labeled '1 Allocate a Custom Questionnaire'. Below this is a 'New' button and a section titled 'MH LONG CV CUSTOM QUEST' with multiple text input fields, each followed by a validation error message: 'The text you entered is too long. Can only accept between 0 and 60 chars.' At the bottom of the task area are 'Submit' and 'Cancel' buttons. A footer bar at the very bottom contains a virtual assistant prompt: 'I'm Posit, your virtual assistant! Please, tell me what you want to do...'.

# Organisation postcode

Previously, when adding a postcode for an organisation, it would be replaced by the postal town when saved.

In this update, the postcode is no longer overwritten and is saved correctly.



The screenshot shows the Osprey Approach Case Management interface. The left sidebar contains a navigation menu with the following items: Osprey Browser App, Home, Client/Matter, Case Management, Client Ledgers, Banks & Journals, Contacts, **Organisations** (highlighted with a red box), Case Bundle, Packages, Time Recording, Reports, Help, and Sign Out. The main content area displays the 'Organisations' section. At the top, there is a 'Global search' bar and a 'Test Workflow Status Bar'. Below this, a table lists various organisations with columns for 'Name' and 'Organisation Id'. The table includes entries such as 'Required', 'Weber Organisation', 'Spaces', 'Bank council', 'Pro Bono Consultancy', 'Juris Civilis', 'A & B Solicitors', '0 NEW ORGANISATION', '012', 'The big hit', 'The organisation 1', 'sdfsdf', 'A & B Solicitors', 'Sc Account Srl', 'Accountant organization for students', 'Triumphus Legal Co.', 'De Facto Law', 'Smith Group Corporate Law', 'BSO', 'Cannabis Counsel', and 'Council Cases'. The 'Organisation Id' column contains corresponding identifiers like 'Ylon', 'WEB ORGANISATION', 'Space Solicitor', 'Yacks Id', '\_BML', '\_KS', '\_WG', '0 NEW', '012ORG012', '12Organisation', '1ORG', '757', 'ABSOLICITORS', 'ACC', 'ACC\_NEW', 'ADVANTAGECWARTON', 'BALL\_PRINT', 'BristolCourt', 'BSO\_ORG', 'CANNABIS', and 'Cannon IT'. At the bottom right, there is a chatbot icon and the text 'I'm Posit, your virtual assistant! Please, tell me what you want to do...'.