



# Release Notes

Update: v2.18.0

Windows Case Management App

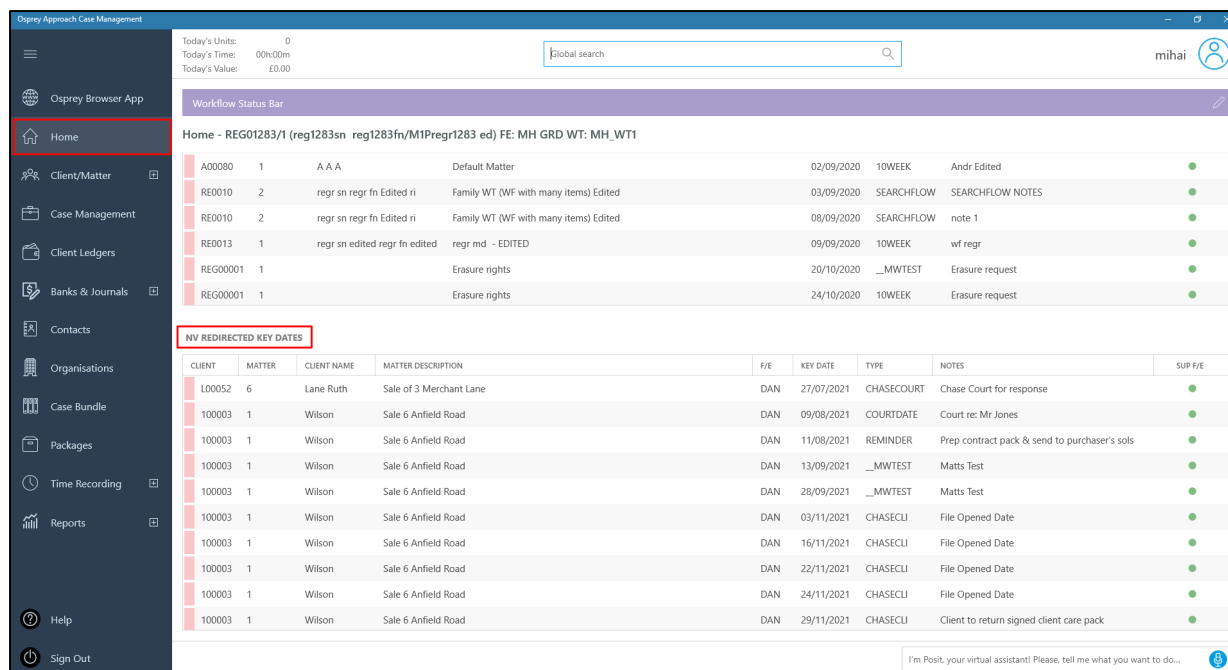
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# Redirected Key Dates

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.



Today's Units: 0  
Today's Time: 00h:00m  
Today's Value: £0.00

Global search

Workflow Status Bar

Home - REG01283/1 (reg1283sn reg1283fn/M1Pregr1283 ed) FE: MH GRD WT: MH\_WT1

CLIENT	MATTER	CLIENT NAME	MATTER DESCRIPTION	F/E	KEY DATE	TYPE	NOTES	SUP F/E
A00080	1	A A A	Default Matter		02/09/2020	10WEEK	Andr Edited	
RED010	2	regr sn regr fn Edited ri	Family WT (WF with many items) Edited		03/09/2020	SEARCHFLOW	SEARCHFLOW NOTES	
RED010	2	regr sn regr fn Edited ri	Family WT (WF with many items) Edited		08/09/2020	SEARCHFLOW	note 1	
RED013	1	regr sn edited regr fn edited	regr mid - EDITED		09/09/2020	10WEEK	wf regr	
REG00001	1		Erasure rights		20/10/2020	_MWTEST	Erasure request	
REG00001	1		Erasure rights		24/10/2020	10WEEK	Erasure request	

**NV REDIRECTED KEY DATES**

CLIENT	MATTER	CLIENT NAME	MATTER DESCRIPTION	F/E	KEY DATE	TYPE	NOTES	SUP F/E
L00052	6	Lane Ruth	Sale of 3 Merchant Lane	DAN	27/07/2021	CHASECOURT	Chase Court for response	
100003	1	Wilson	Sale 6 Anfield Road	DAN	09/08/2021	COURTDATE	Court re: Mr Jones	
100003	1	Wilson	Sale 6 Anfield Road	DAN	11/08/2021	REMINDER	Prep contract pack & send to purchaser's sols	
100003	1	Wilson	Sale 6 Anfield Road	DAN	13/09/2021	_MWTEST	Matts Test	
100003	1	Wilson	Sale 6 Anfield Road	DAN	28/09/2021	_MWTEST	Matts Test	
100003	1	Wilson	Sale 6 Anfield Road	DAN	03/11/2021	CHASECLI	File Opened Date	
100003	1	Wilson	Sale 6 Anfield Road	DAN	16/11/2021	CHASECLI	File Opened Date	
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	
100003	1	Wilson	Sale 6 Anfield Road	DAN	29/11/2021	CHASECLI	Client to return signed client care pack	

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# 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

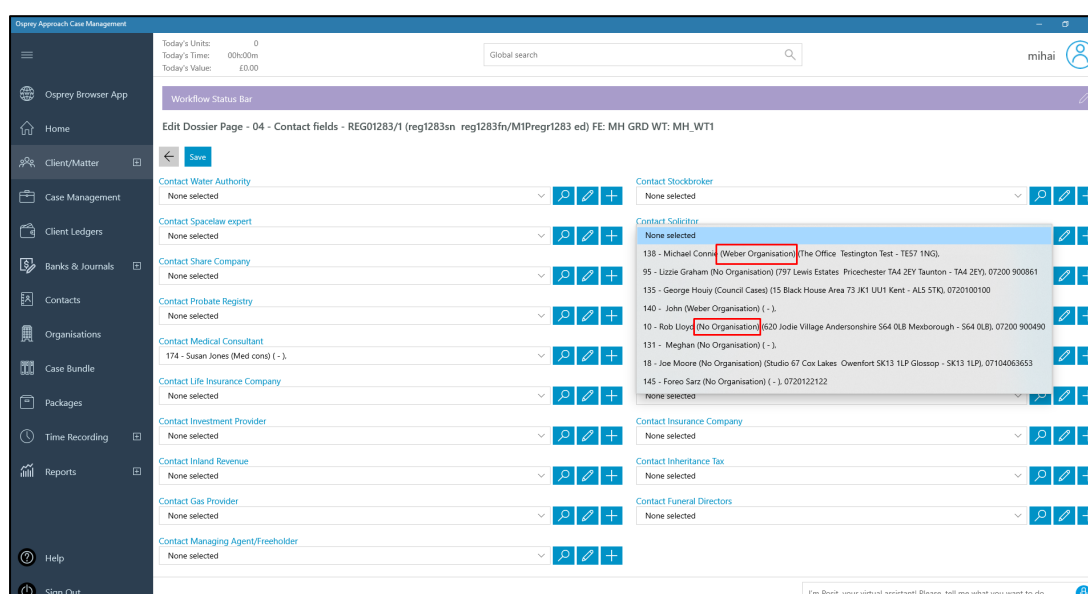
Previously, when users added a new client, they were not automatically prompted to input contact details.

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.

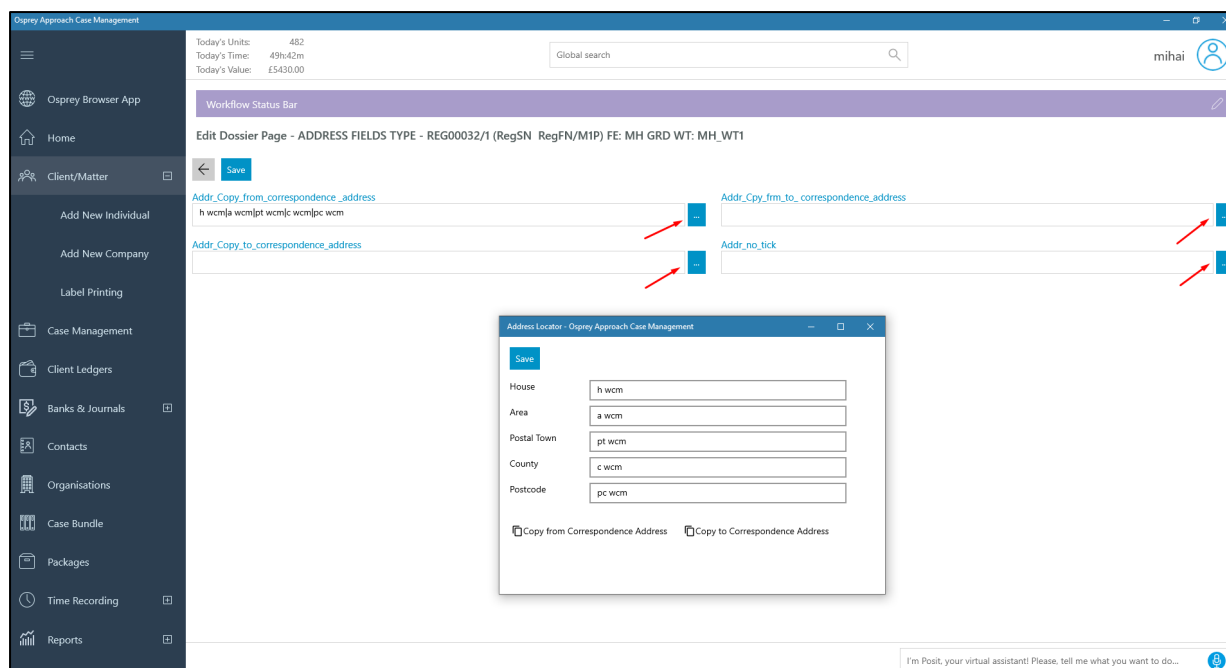
In this update, users will be able to see if that contact is linked to an organisation. If they are not linked to an organisation "No organisation" is displayed.



## Multiline Address

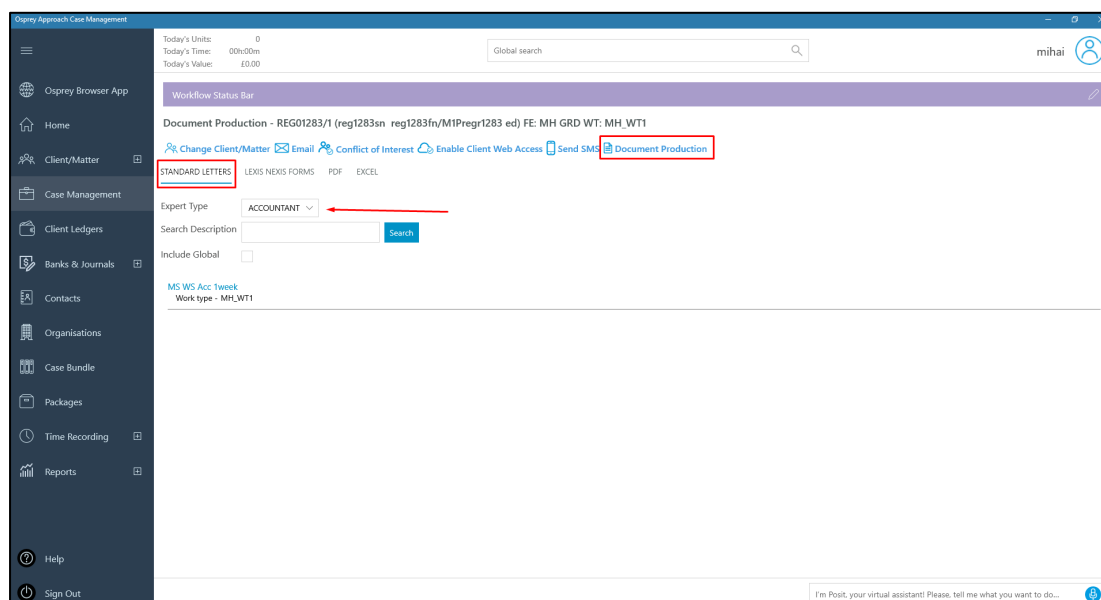
Previously, when the address type was used for a dossier field, the user would have to use the pipe punctuation symbol to show different lines.

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



## 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.



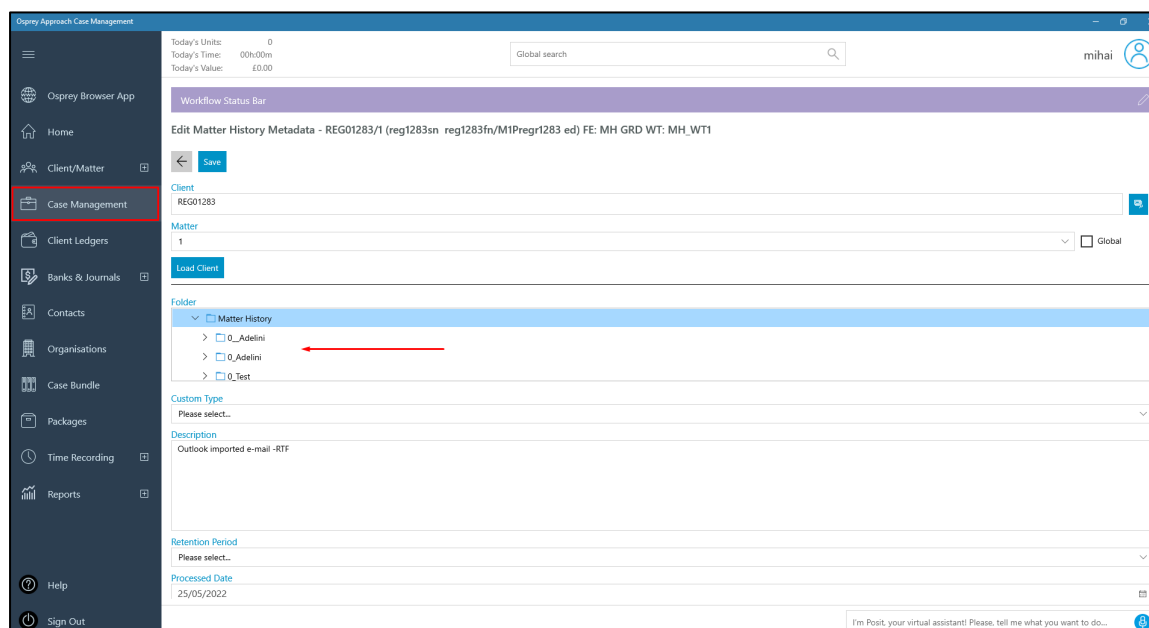
# Exported Email Content

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.



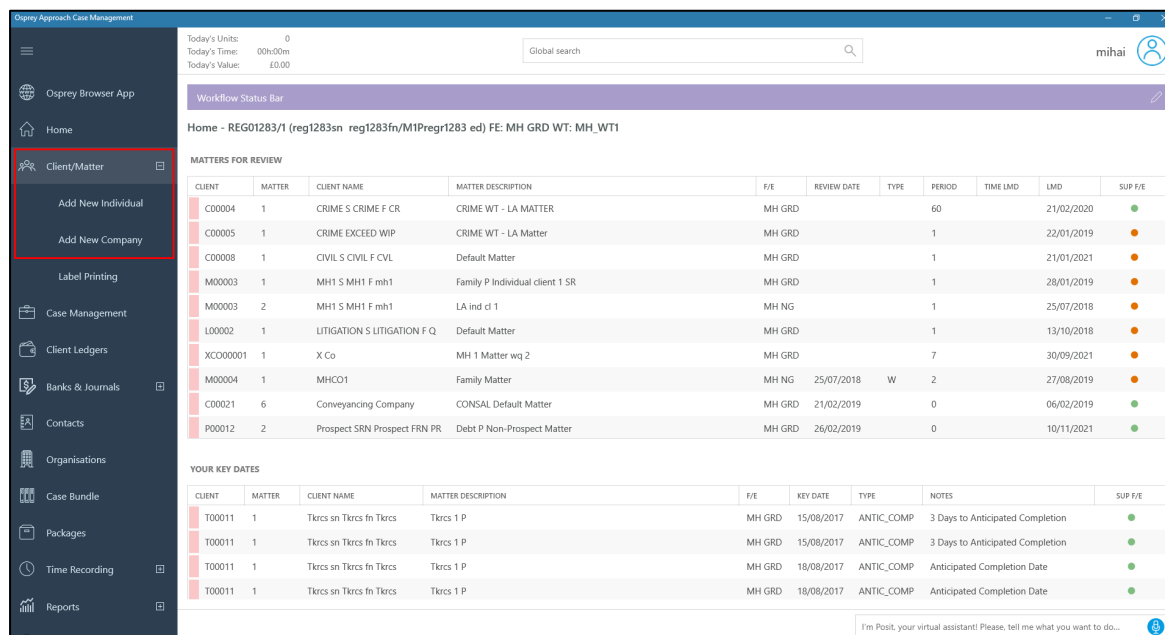
# Case Management redirect

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.



Today's Units: 0  
Today's Time: 00h:00m  
Today's Value: £0.00

Global search

Workflow Status Bar

Home - REG01283/1 (reg1283sn reg1283fn/M1Preg1283 ed) FE: MH GRD WT: MH\_WT1

MATTERS FOR REVIEW

CLIENT	MATTER	CLIENT NAME	MATTER DESCRIPTION	F/E	REVIEW DATE	TYPE	PERIOD	TIME LMD	LMD	SUP F/E
C00004	1	CRIME S CRIME F CR	CRIME WT - LA MATTER	MH GRD			60		21/02/2020	●
C00005	1	CRIME EXCEED WIP	CRIME WT - LA Matter	MH GRD			1		22/01/2019	●
C00008	1	CIVIL S CIVIL F CVL	Default Matter	MH GRD			1		21/01/2021	●
M00003	1	MH1 S MH1 F mh1	Family P Individual client 1 SR	MH GRD			1		28/01/2019	●
M00003	2	MH1 S MH1 F mh1	LA ind d 1	MH NG			1		25/07/2018	●
L00002	1	LITIGATION S LITIGATION F Q	Default Matter	MH GRD			1		13/10/2018	●
XCO00001	1	X Co	MH 1 Matter wq 2	MH GRD			7		30/09/2021	●
M00004	1	MHCO1	Family Matter	MH NG	25/07/2018	W	2		27/08/2019	●
C00021	6	Conveyancing Company	CONSAL Default Matter	MH GRD	21/02/2019		0		06/02/2019	●
P00012	2	Prospect SRN Prospect FRN PR	Debt P Non-Prospect Matter	MH GRD	26/02/2019		0		10/11/2021	●

YOUR KEY DATES

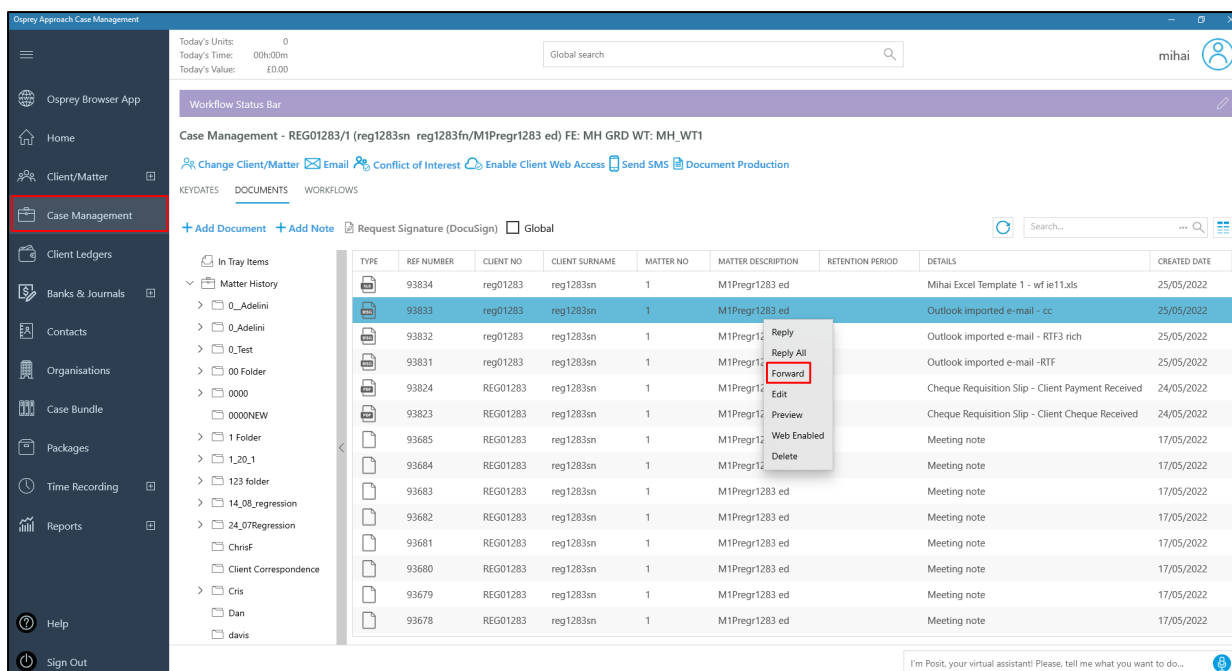
CLIENT	MATTER	CLIENT NAME	MATTER DESCRIPTION	F/E	KEY DATE	TYPE	NOTES	SUP F/E
T00011	1	Tkrsc sn Tkrsc fn Tkrsc	Tkrsc 1 P	MH GRD	15/08/2017	ANTIC_COMP	3 Days to Anticipated Completion	●
T00011	1	Tkrsc sn Tkrsc fn Tkrsc	Tkrsc 1 P	MH GRD	15/08/2017	ANTIC_COMP	3 Days to Anticipated Completion	●
T00011	1	Tkrsc sn Tkrsc fn Tkrsc	Tkrsc 1 P	MH GRD	18/08/2017	ANTIC_COMP	Anticipated Completion Date	●
T00011	1	Tkrsc sn Tkrsc fn Tkrsc	Tkrsc 1 P	MH GRD	18/08/2017	ANTIC_COMP	Anticipated Completion Date	●

I'm Post, your virtual assistant! Please, tell me what you want to 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.

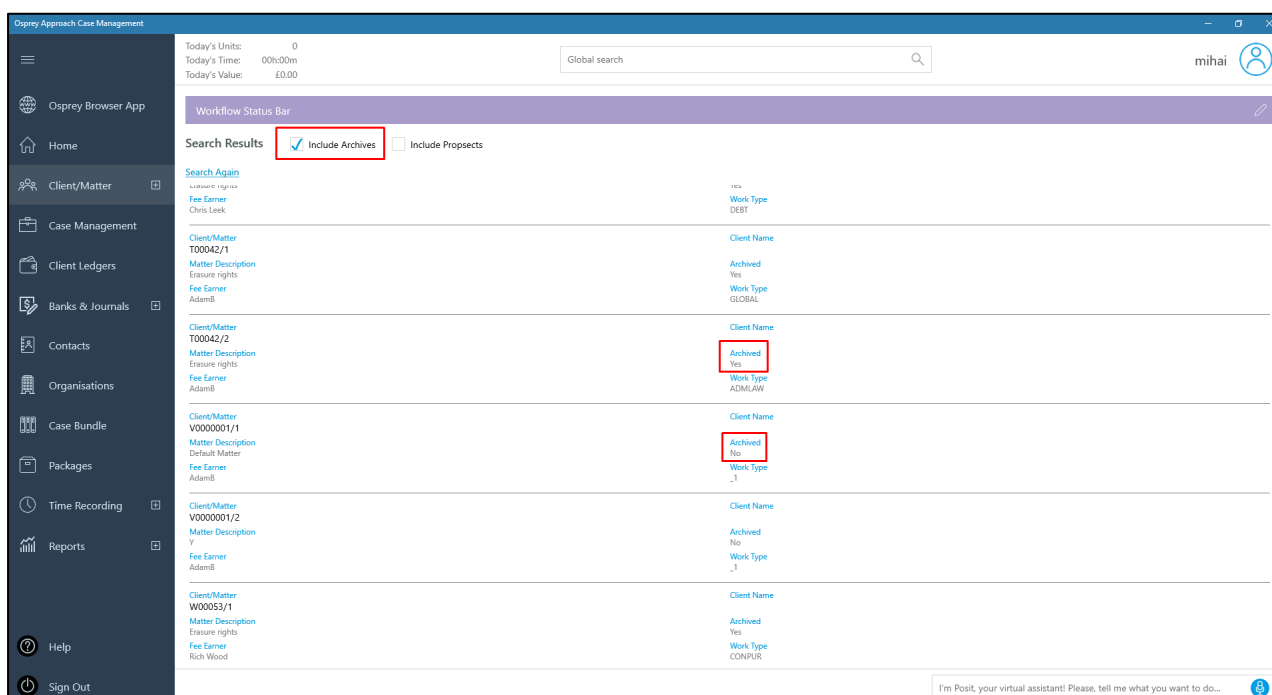


The screenshot shows the 'Case Management' interface. On the left is a sidebar with navigation options: Osprey Browser App, Home, Client/Matter, Case Management (highlighted), Client Ledgers, Banks & Journals, Contacts, Organisations, Case Bundle, Packages, Time Recording, Reports, Help, and Sign Out. The main area displays a 'Workflow Status Bar' and a table of documents. A context menu is open over the document with REF NUMBER 93833, showing options: Reply, Reply All, Forward (highlighted), Edit, Preview, Web Enabled, and Delete.

TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	MATTER DESCRIPTION	RETENTION PERIOD	DETAILS	CREATED DATE
	93834	reg01283	reg1283sn	1	M1Preg1283 ed		Mihai Excel Template 1 - wrie11.xls	25/05/2022
	93833	reg01283	reg1283sn	1	M1Preg1283 ed		Outlook imported e-mail - cc	25/05/2022
	93832	reg01283	reg1283sn	1	M1Preg1283 ed		Outlook imported e-mail - RTF3 rich	25/05/2022
	93831	reg01283	reg1283sn	1	M1Preg1283 ed		Outlook imported e-mail - RTF	25/05/2022
	93824	reg01283	reg1283sn	1	M1Preg1283 ed		Cheque Requisition Slip - Client Payment Received	24/05/2022
	93823	REG01283	reg1283sn	1	M1Preg1283 ed		Cheque Requisition Slip - Client Cheque Received	24/05/2022
	93685	REG01283	reg1283sn	1	M1Preg1283 ed		Meeting note	17/05/2022
	93684	REG01283	reg1283sn	1	M1Preg1283 ed		Meeting note	17/05/2022
	93683	REG01283	reg1283sn	1	M1Preg1283 ed		Meeting note	17/05/2022
	93682	reg1283sn	reg1283sn	1	M1Preg1283 ed		Meeting note	17/05/2022
	93681	REG01283	reg1283sn	1	M1Preg1283 ed		Meeting note	17/05/2022
	93680	REG01283	reg1283sn	1	M1Preg1283 ed		Meeting note	17/05/2022
	93679	REG01283	reg1283sn	1	M1Preg1283 ed		Meeting note	17/05/2022
	93678	REG01283	reg1283sn	1	M1Preg1283 ed		Meeting note	17/05/2022

## 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.



The screenshot shows the 'Search Results' screen. At the top, there are filters: 'Include Archives' (checked) and 'Include Proposets' (unchecked). The results are displayed in a table with columns for Client Name, Archived status, and Work Type.

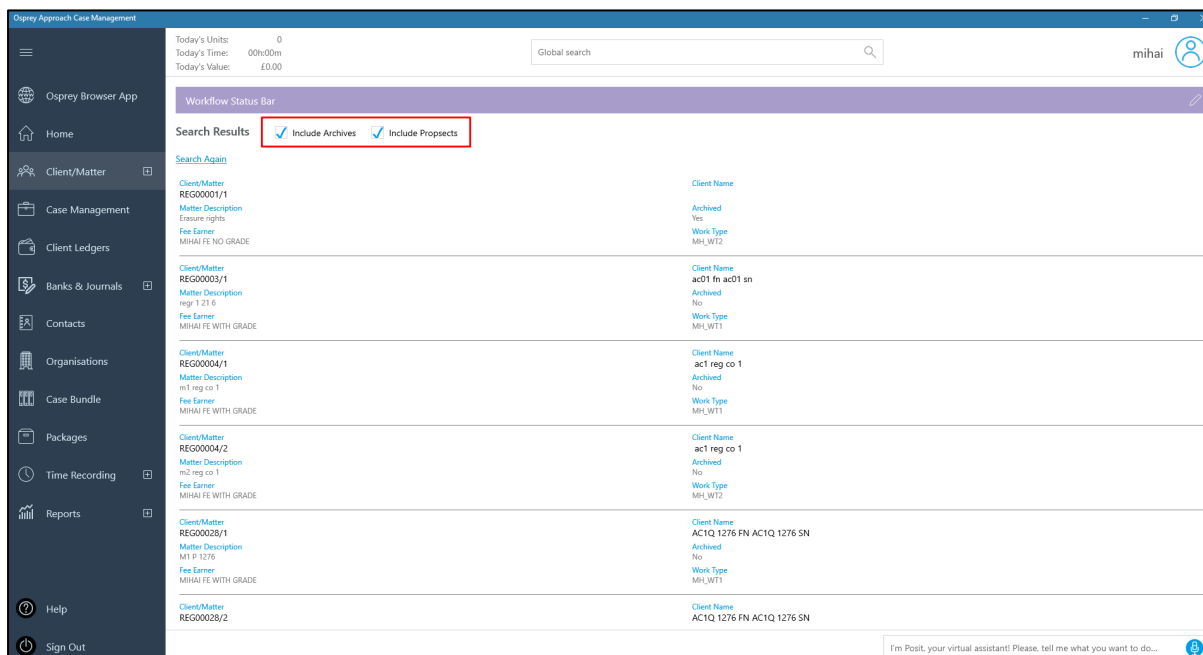
Client Name	Archived	Work Type
Client/Matter T00042/1	Yes	GLOBAL
Client/Matter T00042/2	Yes	ADMLAW
Client/Matter V0000001/1	No	_1
Client/Matter V0000001/2	No	_1
Client/Matter W00053/1	Yes	CONPUR



# 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.

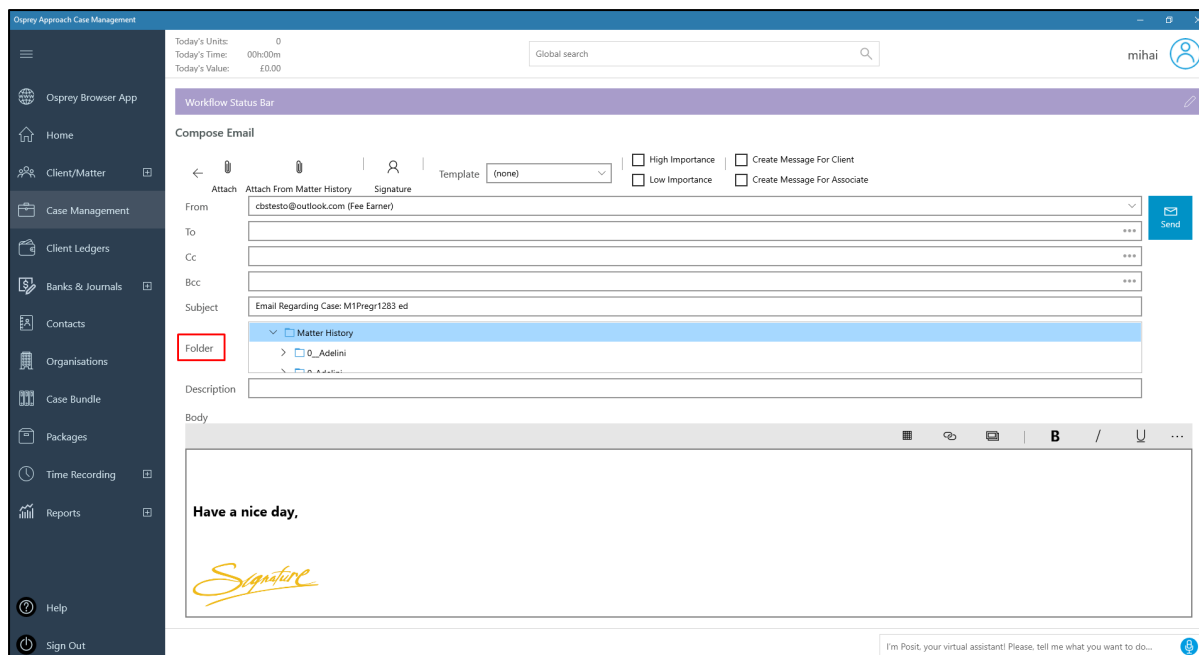


The screenshot shows the Osprey Approach Case Management interface. On the left is a sidebar with navigation options: Osprey Browser App, Home, Client/Matter, Case Management, Client Ledgers, Banks & Journals, Contacts, Organisations, Case Bundle, Packages, Time Recording, Reports, Help, and Sign Out. The main area displays search results. At the top, there's a 'Workflow Status Bar' and a 'Search Results' section with two checkboxes: 'Include Archives' and 'Include Prospects', both of which are checked and highlighted with a red box. Below this, a table lists search results with columns for Client/Matter, Matter Description, Fee Earnings, Client Name, Archived status, and Work Type. The results include entries for REG00001/1, REG00003/1, REG00004/1, REG00004/2, REG00028/1, and REG00028/2.

Client/Matter	Matter Description	Fee Earnings	Client Name	Archived	Work Type
REG00001/1	Erasure rights	MIHAI FE NO GRADE	ac01 fn ac01 sn	Yes	MH_WT2
REG00003/1	reg:1 23 6	MIHAI FE WITH GRADE	ac01 fn ac01 sn	No	MH_WT1
REG00004/1	m1 reg co 1	MIHAI FE WITH GRADE	ac1 reg co 1	No	MH_WT1
REG00004/2	m2 reg co 1	MIHAI FE WITH GRADE	ac1 reg co 1	No	MH_WT2
REG00028/1	M1 P 1276	MIHAI FE WITH GRADE	ACTQ 1276 FN ACTQ 1276 SN	No	MH_WT1
REG00028/2			ACTQ 1276 FN ACTQ 1276 SN		

# 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

Today's Units: 0  
Today's Time: 00h:00m  
Today's Value: £0.00

Global search

mihai

Workflow Status Bar

Compose Email

Attach Attach From Matter History Signature Template (none) High Importance Create Message For Client Low Importance Create Message For Associate

From: cbstesto@outlook.com (Fee Earner)

To:

Cc:

Bcc:

Subject: Email Regarding Case: M1Pregr1283 ed

Folder: ☒ Matter History  
☐ O\_Adelini

Description:

Body:

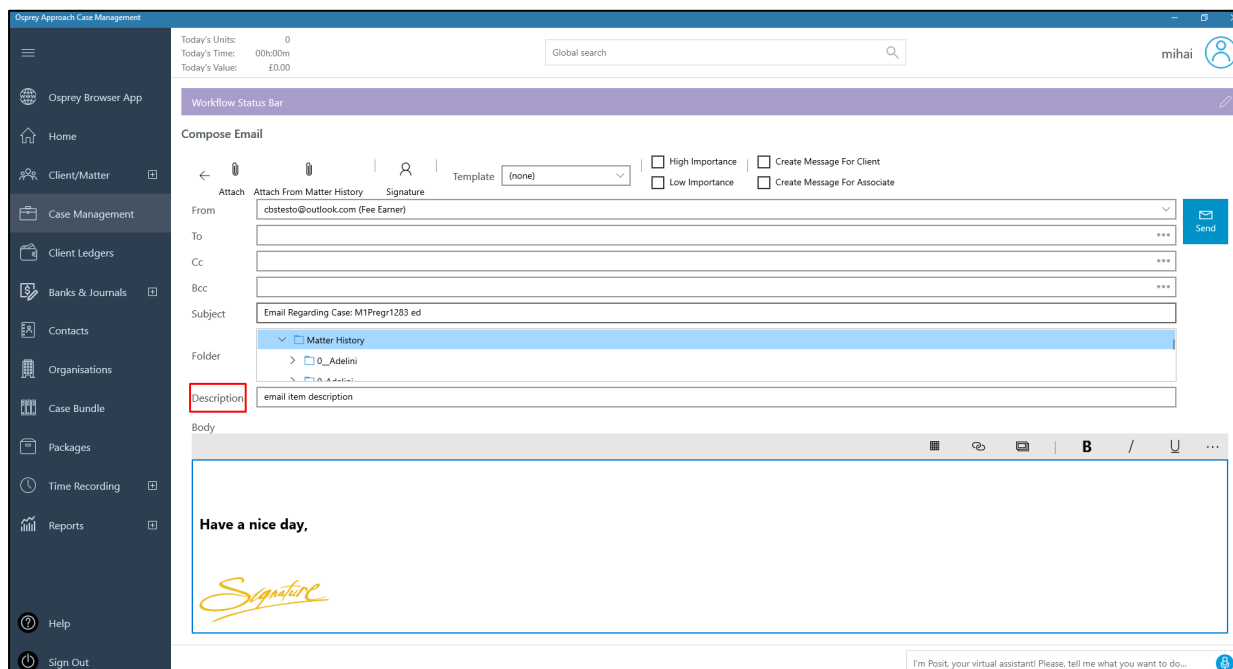
Have a nice day.

Signature

I'm Posit, your virtual assistant! Please, tell me what you want to do...

## 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 Approach Case Management

Today's Units: 0  
Today's Time: 00h:00m  
Today's Value: £0.00

Global search

mihai

Workflow Status Bar

Compose Email

Attach Attach From Matter History Signature Template (none) High Importance Create Message For Client Low Importance Create Message For Associate

From: cbstesto@outlook.com (Fee Earner)

To:

Cc:

Bcc:

Subject: Email Regarding Case: M1Pregr1283 ed

Folder: ☒ Matter History  
☐ O\_Adelini

Description: email item description

Body:

Have a nice day.

Signature

I'm Posit, your virtual assistant! 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.

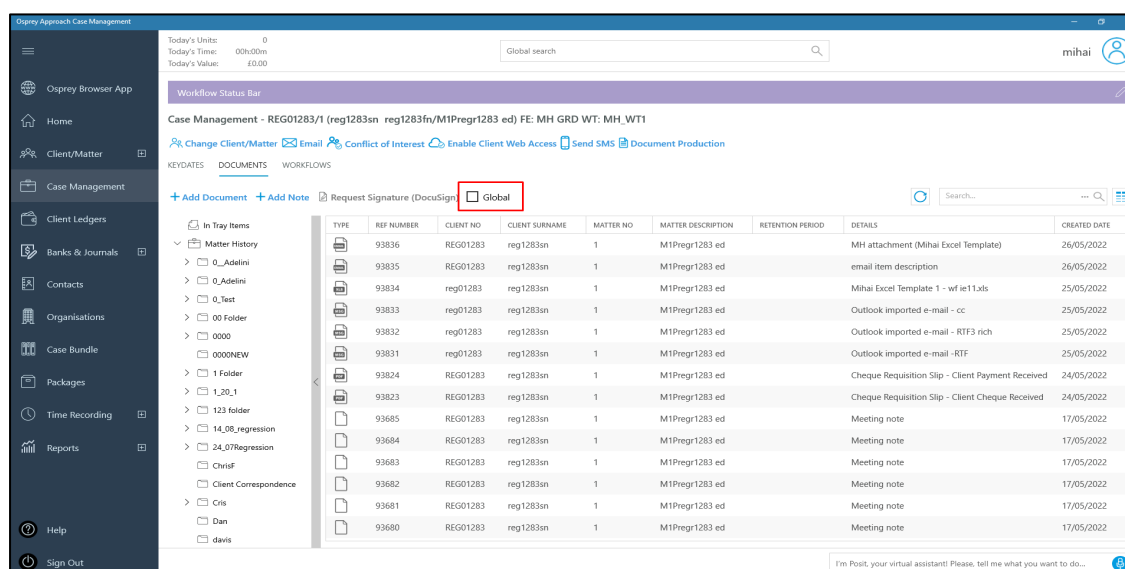
In this update, if the attachment already exists, it is not duplicated.

## 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.



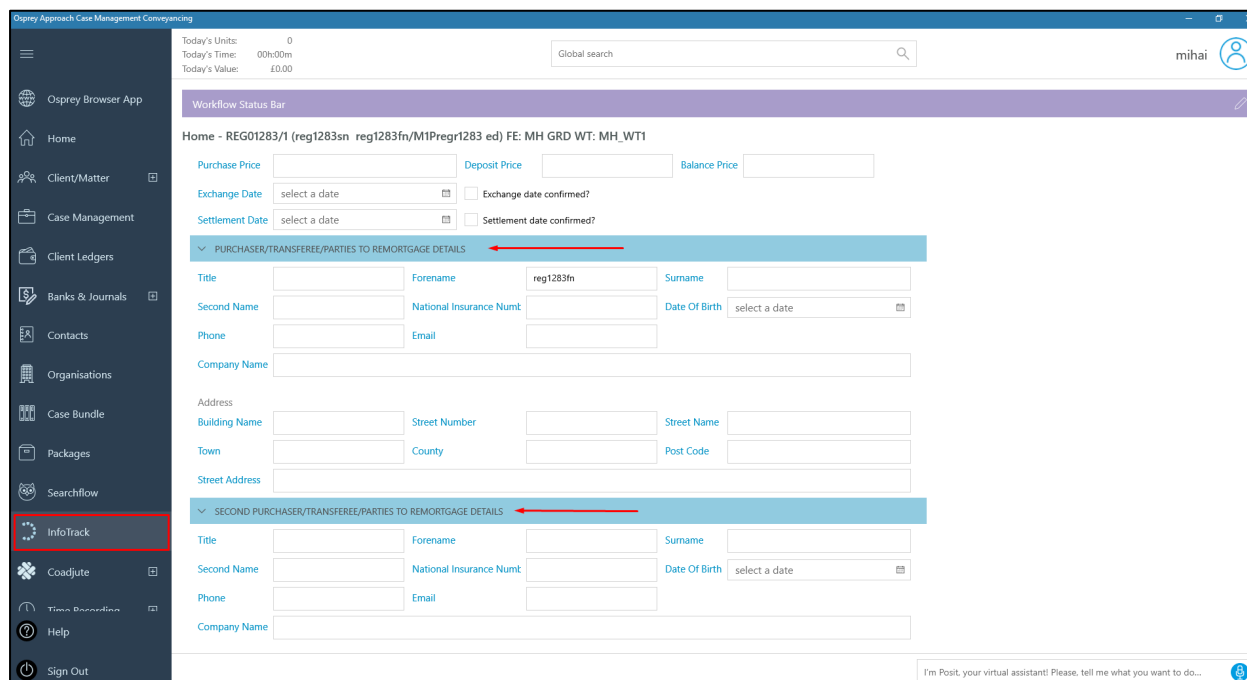
The screenshot displays the Osprey Approach Case Management app interface. On the left is a dark sidebar with navigation icons for Osprey Browser App, Home, Client/Matter, Case Management, Client Ledgers, Banks & Journals, Contacts, Organisations, Case Bundle, Packages, Time Recording, Reports, Help, and Sign Out. The main area shows a 'Workflow Status Bar' and a 'Case Management' header for 'REG01283/1 (reg1283sn reg1283fn/M1Pregr1283 ed) FE: MH GRD WT: MH\_WT1'. Below this are tabs for KEYDATES, DOCUMENTS, and WORKFLOWS. The 'DOCUMENTS' tab is active, showing a table of documents. A red box highlights the 'Global' checkbox in the 'Request Signature (DocuSign)' section. The table lists documents with columns for TYPE, REF NUMBER, CLIENT NO, CLIENT SURNAME, MATTER NO, MATTER DESCRIPTION, RETENTION PERIOD, DETAILS, and CREATED DATE.

TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	MATTER DESCRIPTION	RETENTION PERIOD	DETAILS	CREATED DATE
Document	93836	REG01283	reg1283sn	1	M1Pregr1283 ed		MH attachment (Mihai Excel Template)	26/05/2022
Document	93835	REG01283	reg1283sn	1	M1Pregr1283 ed		email item description	26/05/2022
Document	93834	reg01283	reg1283sn	1	M1Pregr1283 ed		Mihai Excel Template 1 - wf ie11.xls	25/05/2022
Document	93833	reg01283	reg1283sn	1	M1Pregr1283 ed		Outlook imported e-mail - cc	25/05/2022
Document	93832	reg01283	reg1283sn	1	M1Pregr1283 ed		Outlook imported e-mail - RTF3 rich	25/05/2022
Document	93831	reg01283	reg1283sn	1	M1Pregr1283 ed		Outlook imported e-mail - RTF	25/05/2022
Document	93824	REG01283	reg1283sn	1	M1Pregr1283 ed		Cheque Requisition Slip - Client Payment Received	24/05/2022
Document	93823	REG01283	reg1283sn	1	M1Pregr1283 ed		Cheque Requisition Slip - Client Cheque Received	24/05/2022
Document	93685	REG01283	reg1283sn	1	M1Pregr1283 ed		Meeting note	17/05/2022
Document	93684	REG01283	reg1283sn	1	M1Pregr1283 ed		Meeting note	17/05/2022
Document	93683	REG01283	reg1283sn	1	M1Pregr1283 ed		Meeting note	17/05/2022
Document	93682	REG01283	reg1283sn	1	M1Pregr1283 ed		Meeting note	17/05/2022
Document	93681	REG01283	reg1283sn	1	M1Pregr1283 ed		Meeting note	17/05/2022
Document	93680	REG01283	reg1283sn	1	M1Pregr1283 ed		Meeting note	17/05/2022

# 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.

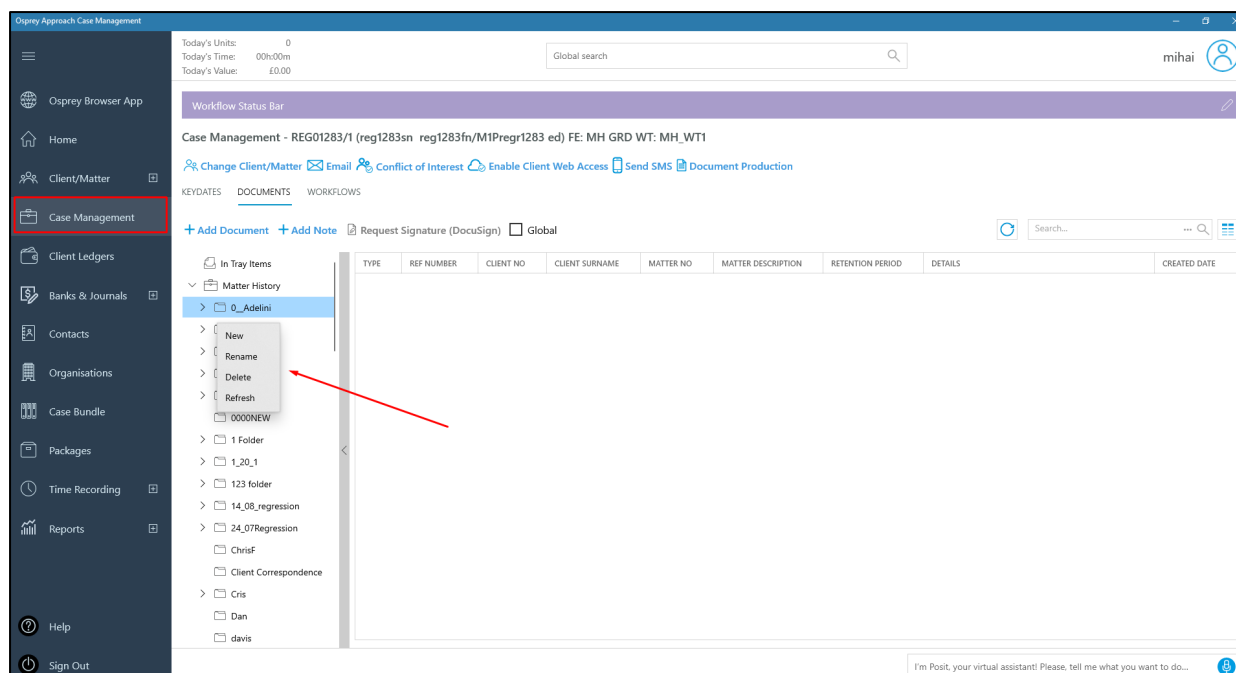
In this update, the labels have been updated.



# 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

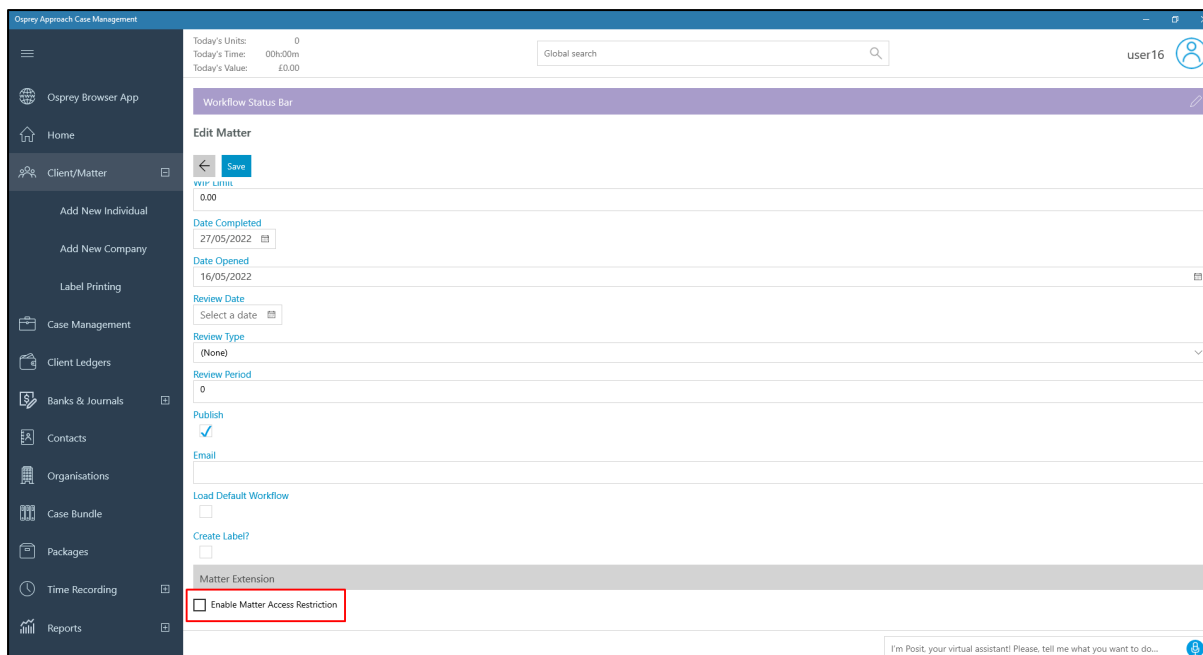
Previously, if a bill was saved on the PC, Osprey would show that there was already a document open for editing.

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.

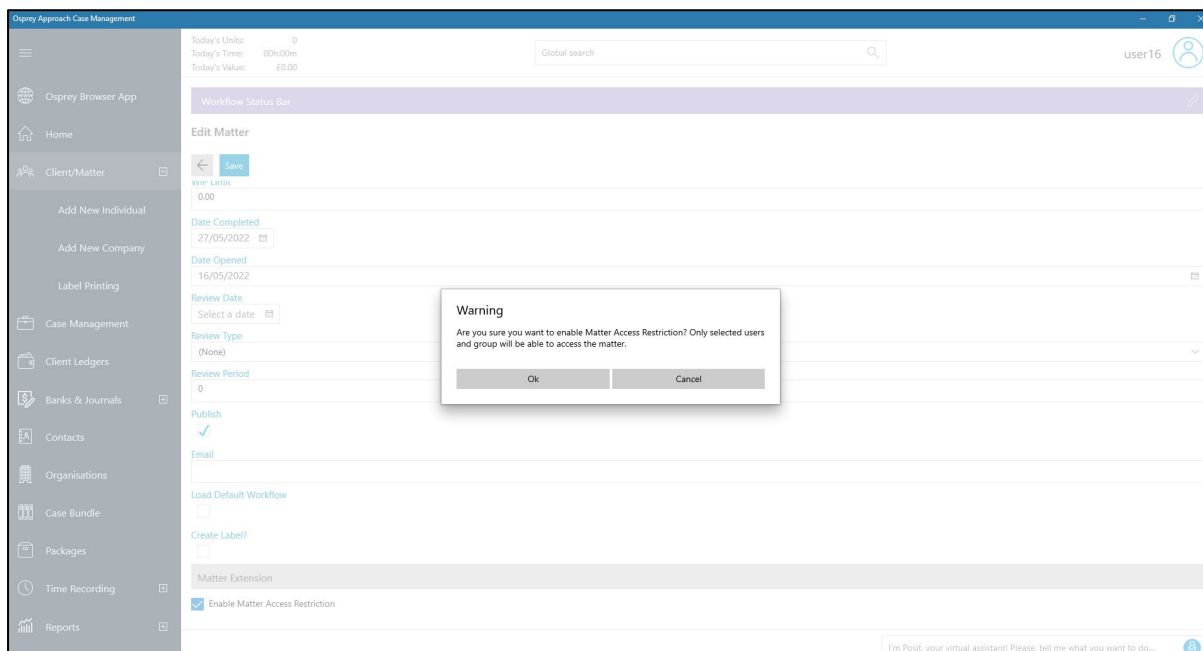
In this update, there is a new switch located in Client / Matter > Edit Matter.



The screenshot shows the 'Edit Matter' form in the Osprey Approach Case Management app. The form includes fields for 'Date Completed' (27/05/2022), 'Date Opened' (16/05/2022), 'Review Date' (Select a date), 'Review Type' (None), 'Review Period' (0), 'Publish' (checked), 'Email' (checked), 'Load Default Workflow' (unchecked), 'Create Label?' (unchecked), and 'Matter Extension'. The 'Enable Matter Access Restriction' checkbox is highlighted with a red box.

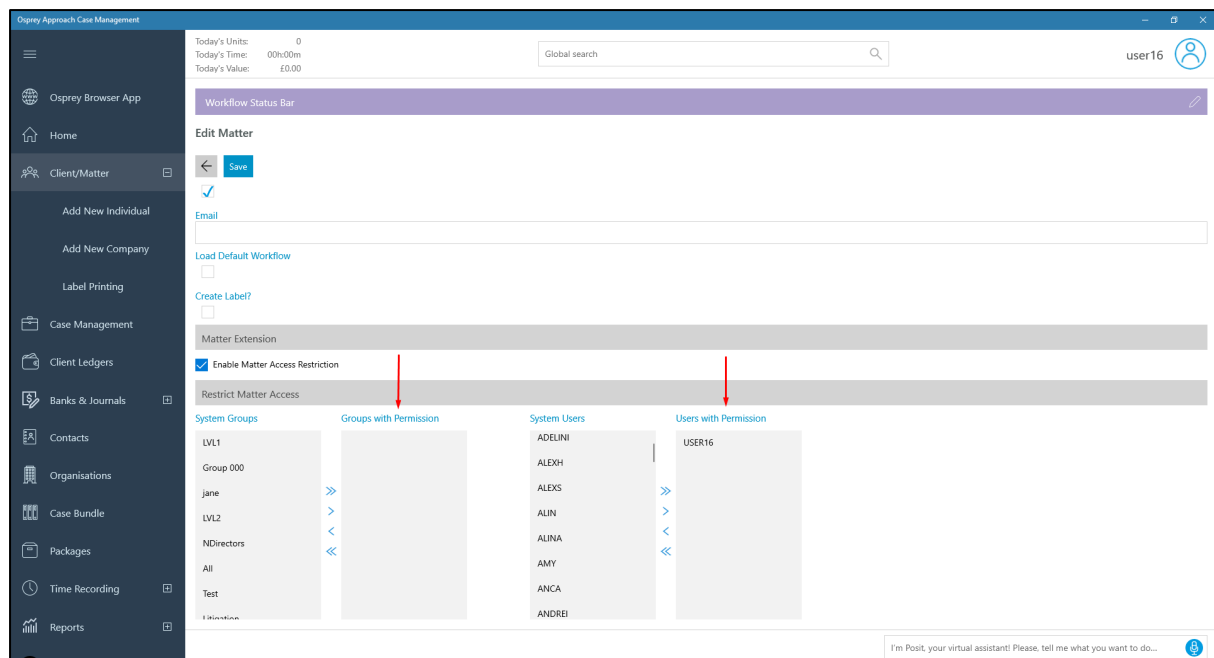
The checkbox is unticked by default. If the matter is saved with this unticked, no restrictions are applied. Newly added users are no longer restricted to matters that had previously been edited.

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

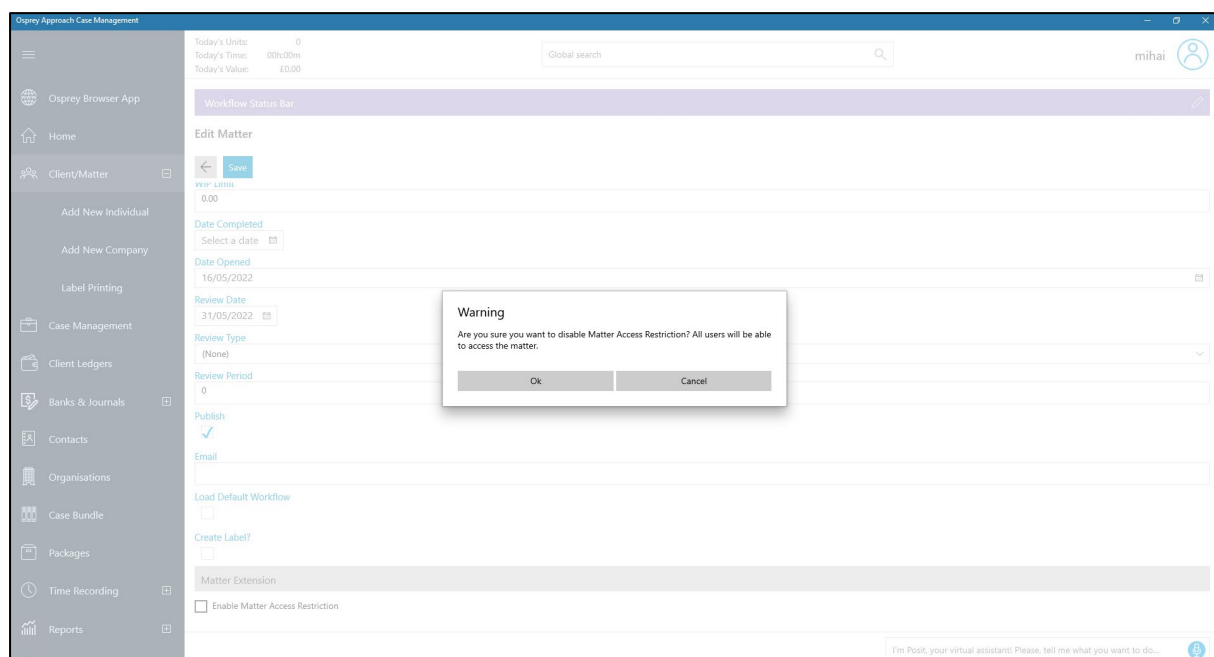


The screenshot shows the 'Edit Matter' form with a warning dialog box displayed. The dialog box contains the text: 'Warning: Are you sure you want to enable Matter Access Restriction? Only selected users and group will be able to access the matter.' The 'Enable Matter Access Restriction' checkbox is now checked.

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



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

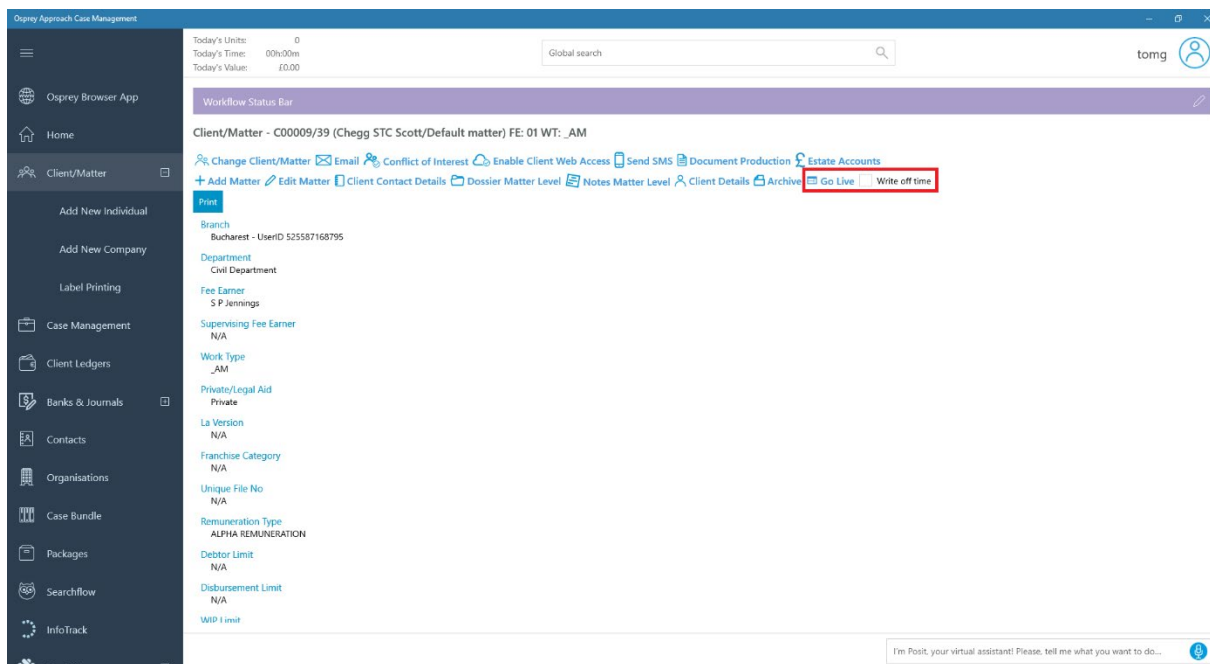


The Matter Restriction Audit for Osprey Approach Browser version (Reports > Miscellaneous Reports), records enabling and disabling matter restrictions.

## 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.

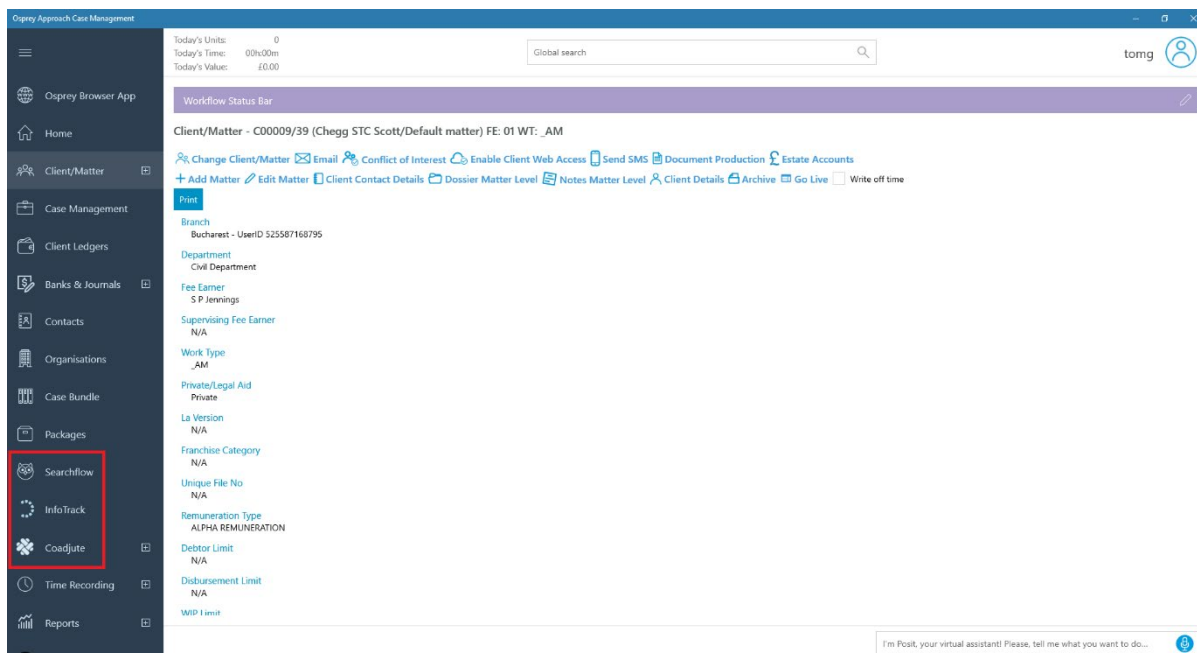


## Addition of Integrations

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.





Workflow Status Bar

Client/Matter - C00009/39 (Chegg STC Scott/Default matter) FE: 01 WT: .AM

Branch: Bucharest - UserID 525587168795

Department: Civil Department

Fee Earner: S P Jennings

Supervising Fee Earner: N/A

Work Type: .AM

Private/Legal Aid: Private

La Version: N/A

Franchise Category: N/A

Unique File No: N/A

Remuneration Type: ALPHA REMUNERATION

Debtor Limit: N/A

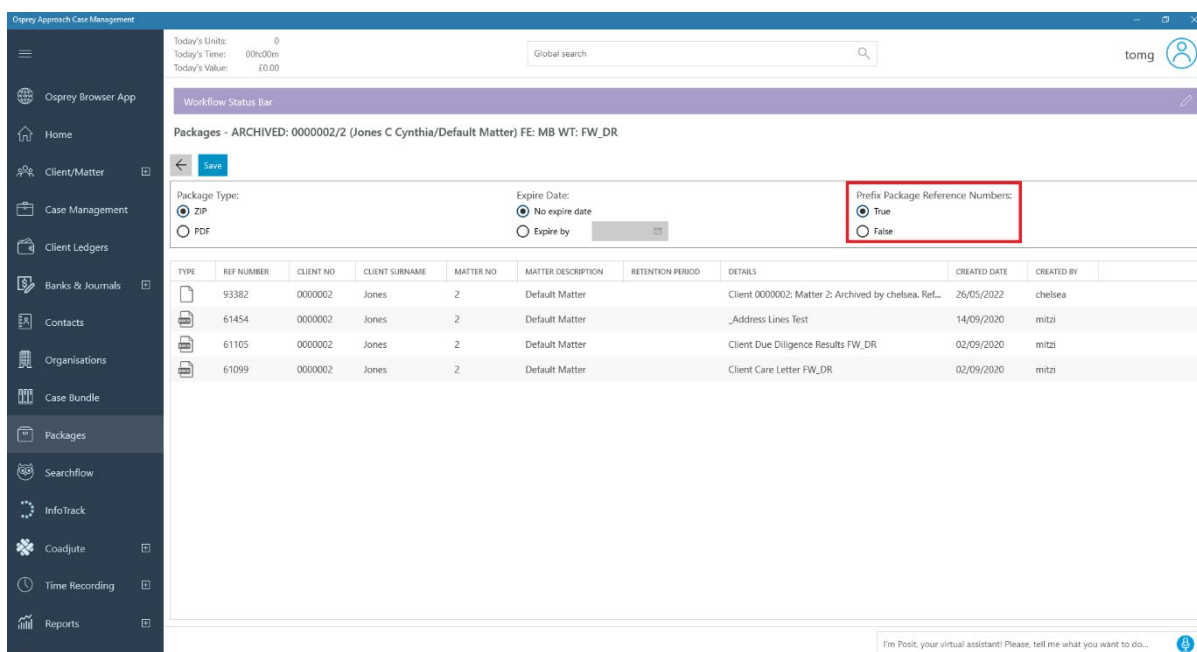
Disbursement Limit: N/A

WIP Limit: N/A

I'm Posit, your virtual assistant! Please, tell me what you want to do...

# Packages

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



Workflow Status Bar

Packages - ARCHIVED: 0000002/2 (Jones C Cynthia/Default Matter) FE: MB WT: FW\_DR

Package Type: ZIP (selected) PDF




Expire Date: No expire date (selected) Expire by

Prefix Package Reference Numbers: True (selected) False




TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	MATTER DESCRIPTION	RETENTION PERIOD	DETAILS	CREATED DATE	CREATED BY
Document	93382	0000002	Jones	2	Default Matter		Client 0000002: Matter 2: Archived by chelsea. Ref...	26/05/2022	chelsea
Document	61454	0000002	Jones	2	Default Matter		_Address Lines Test	14/09/2020	mitzi
Document	61105	0000002	Jones	2	Default Matter		Client Due Diligence Results FW_DR	02/09/2020	mitzi
Document	61099	0000002	Jones	2	Default Matter		Client Care Letter FW_DR	02/09/2020	mitzi

I'm Posit, your virtual assistant! Please, tell me what you want to do...

True:

Name	
 61099_Client Care Letter FW_DR	
 61105_Client Due Diligence Results ...	
 61454_Address Lines Test	

False:

Name	
 _Address Lines Test	
 Client Care Letter FW_DR	
 Client Due Diligence Results FW_DR	