



Release Notes

Update: v2.18.0

Windows Case Management App

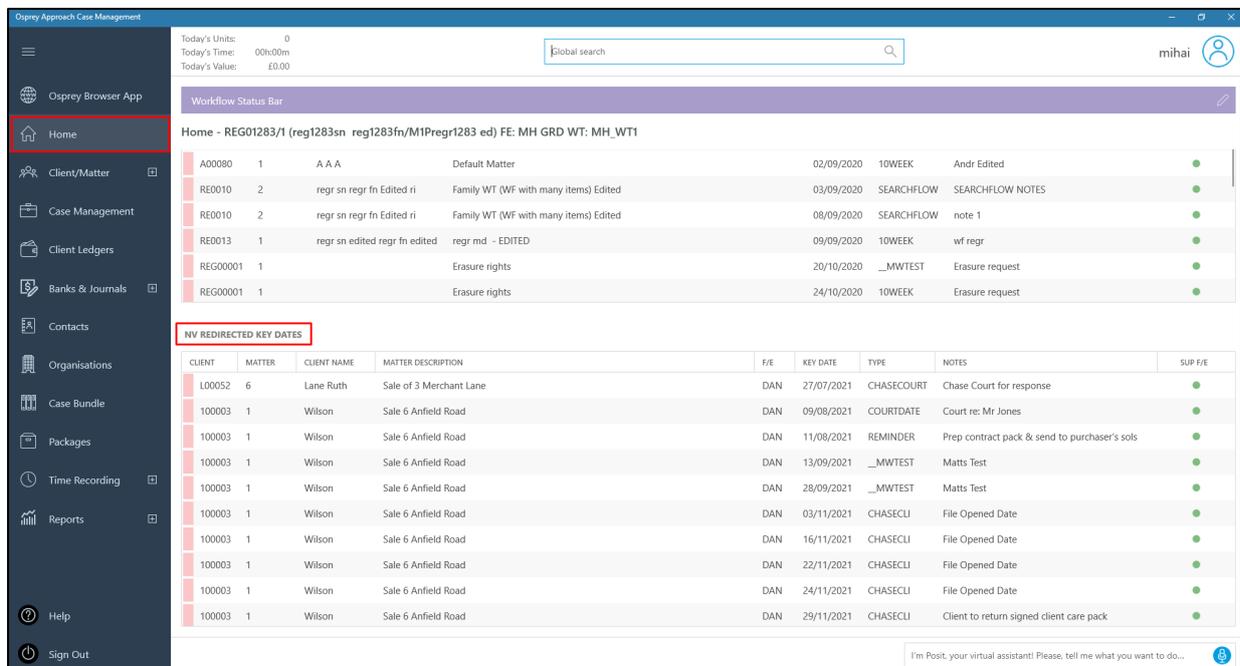
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Redirected Key Dates

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.



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

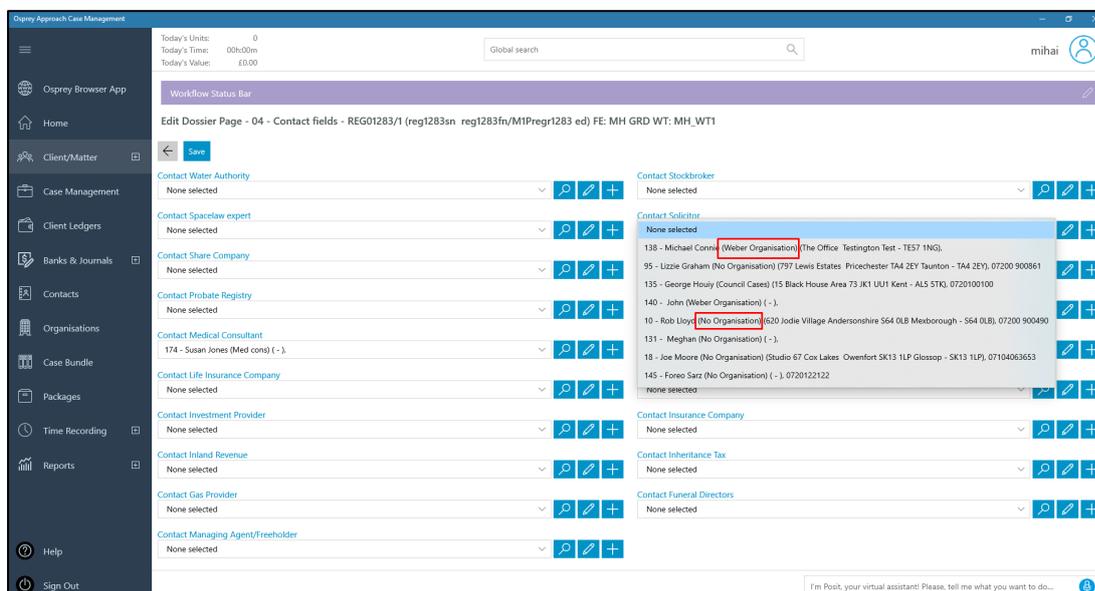
Previously, when users added a new client, they were not automatically prompted to input contact details.

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.

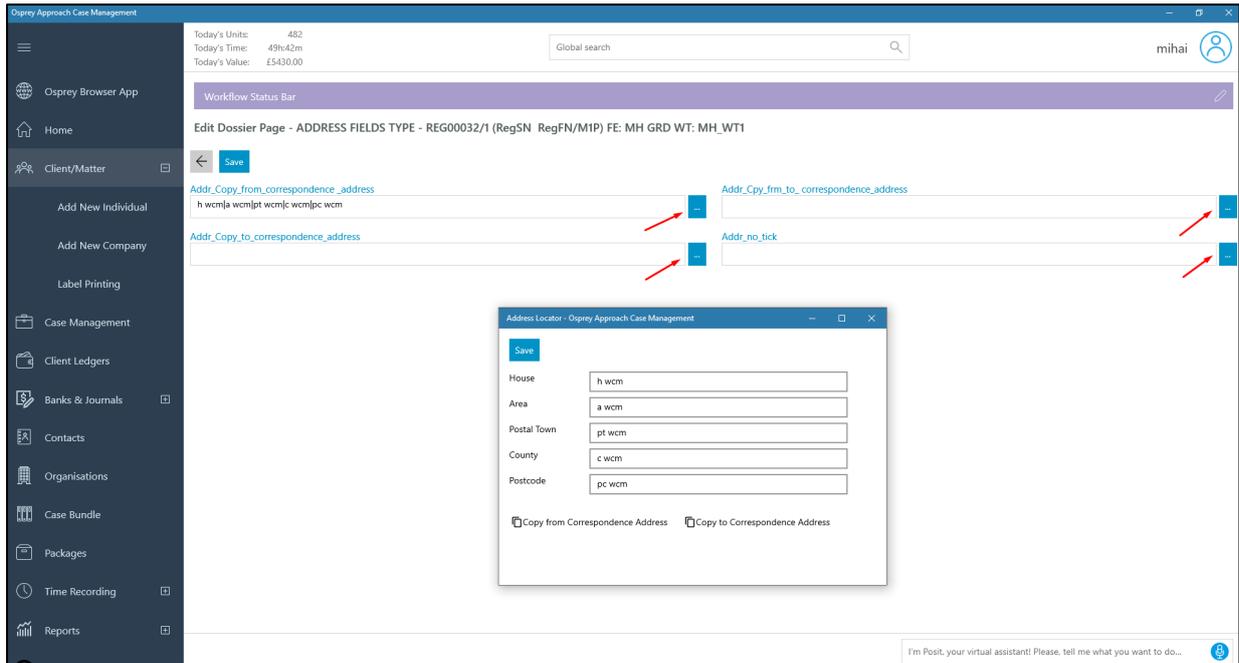
In this update, users will be able to see if that contact is linked to an organisation. If they are not linked to an organisation "No organisation" is displayed.



Multiline Address

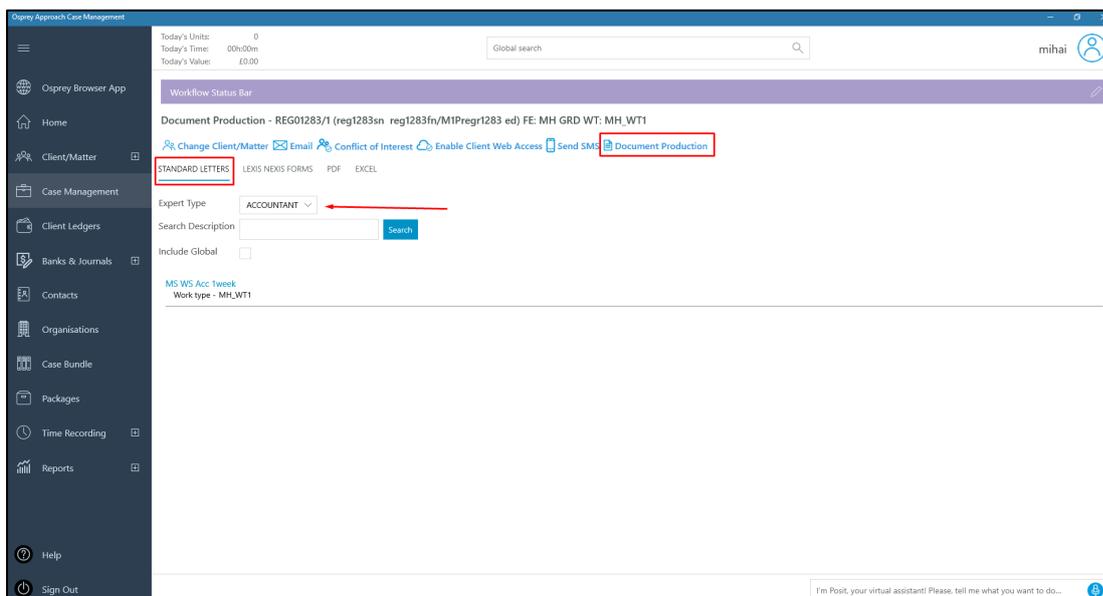
Previously, when the address type was used for a dossier field, the user would have to use the pipe punctuation symbol to show different lines.

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.



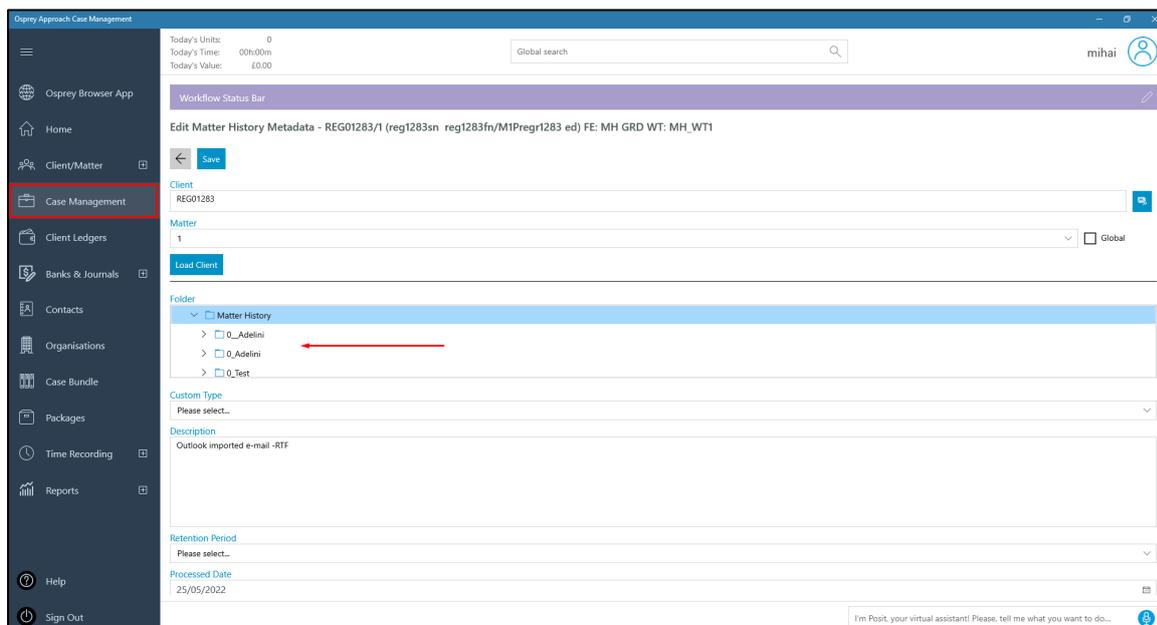
Exported Email Content

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.



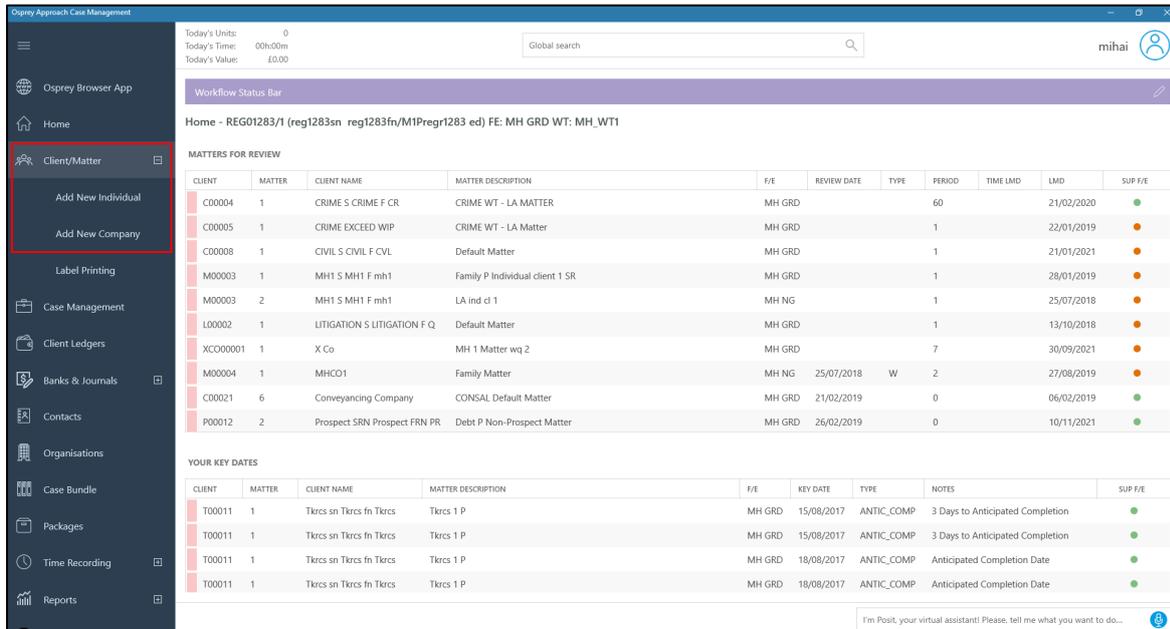
Case Management redirect

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

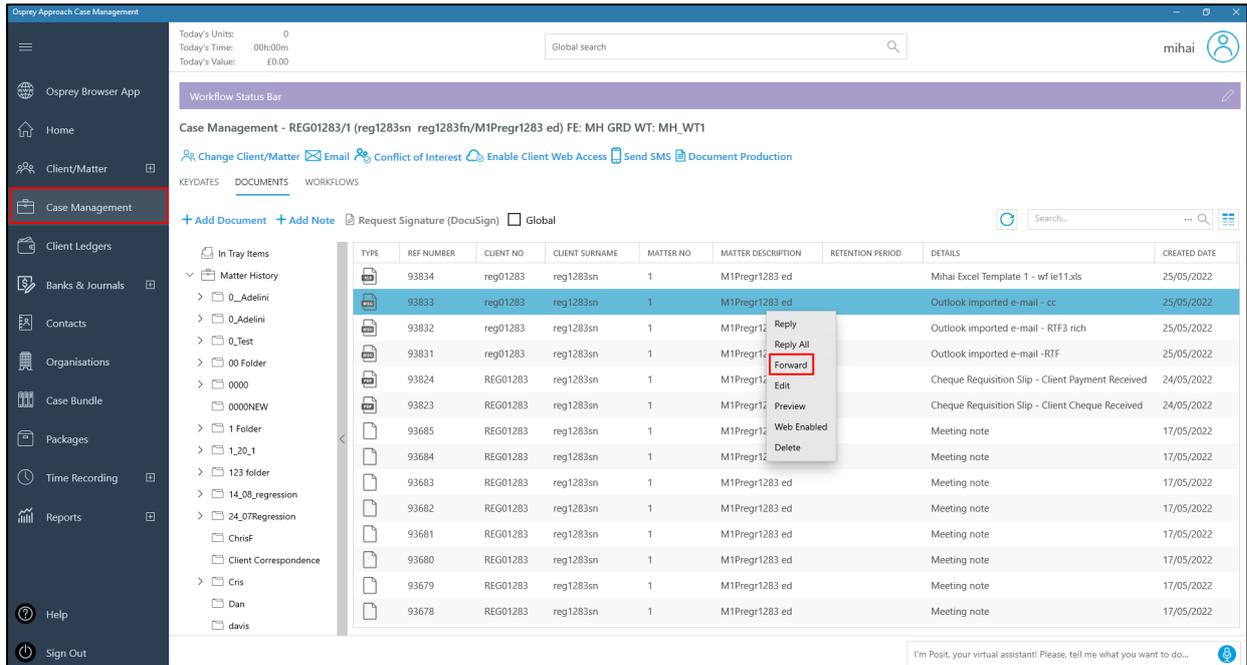
A new shortcut has been added to the left-hand side navigation menu, under the Client / Matter section, for users to add a new client.



Email Forwarding

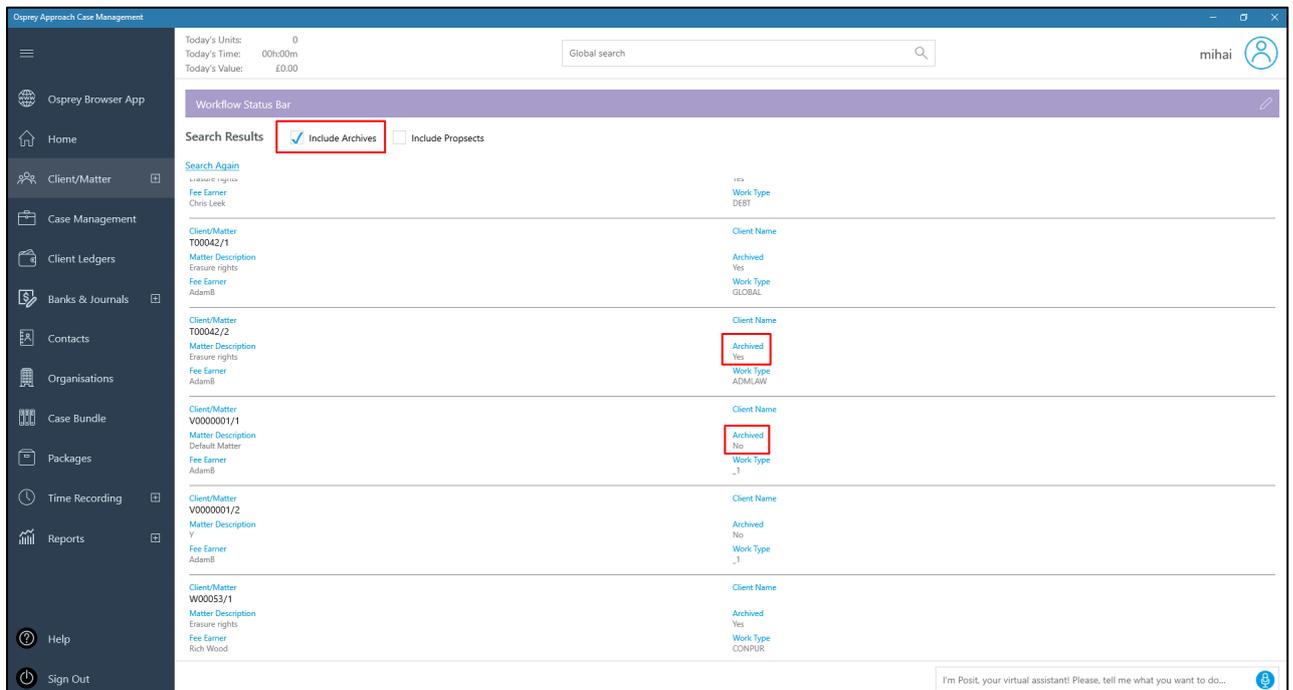
Previously, the case management app did not offer the option to forward an email from the matter history.

In this update, this functionality has been added.



Archived Matter Search Results

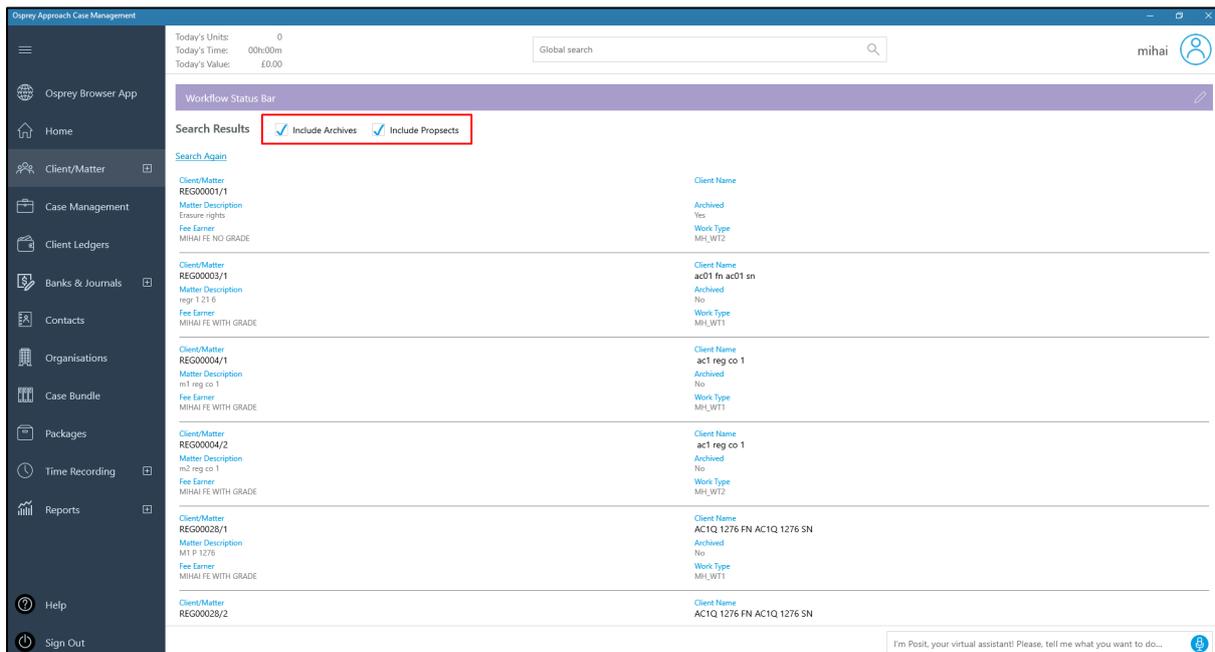
When searching for a client, users can now see at a glance from the search results, whether the client is archived or not.



Archived / Prospect clients in search

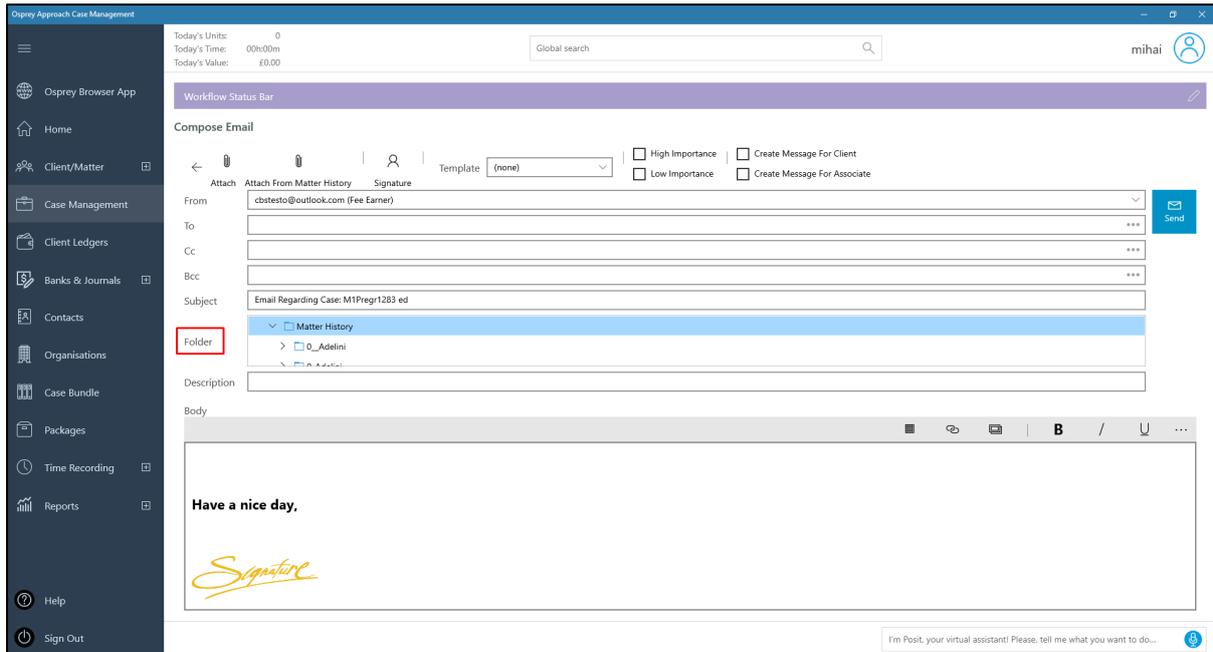
Previously, users were not able to filter archived/prospect clients when carrying out searches.

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



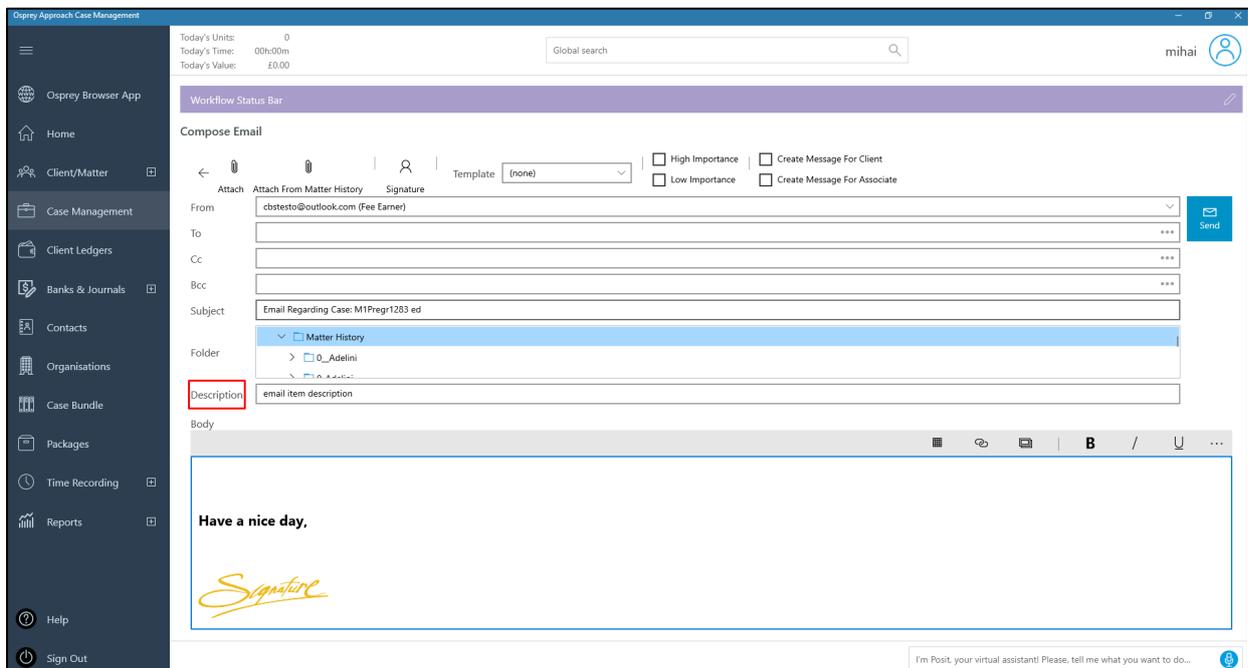
Matter History Folder when emailing

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



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.



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.

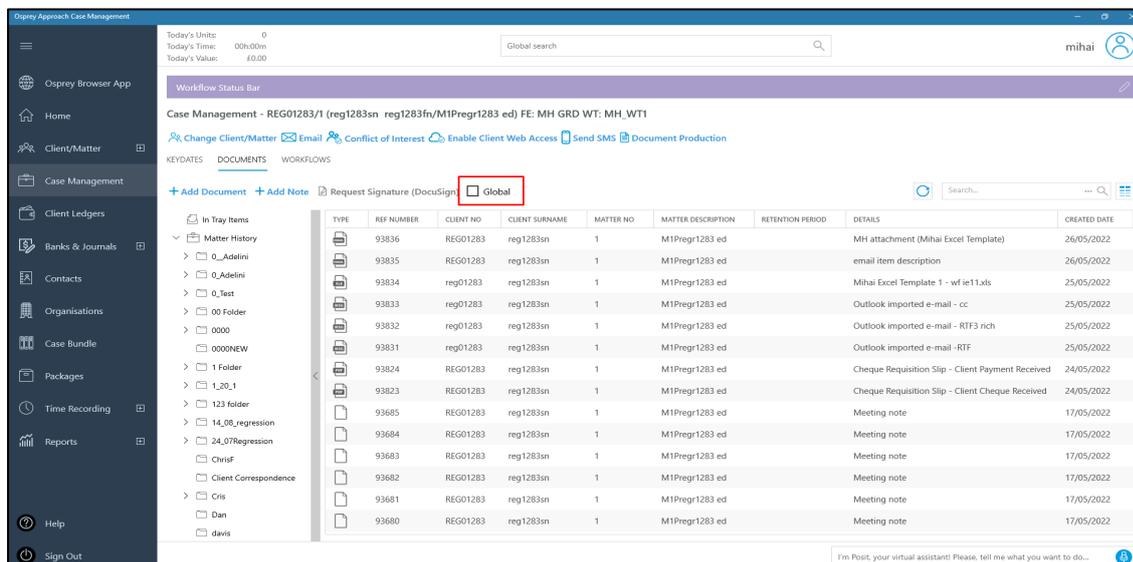
In this update, if the attachment already exists, it is not duplicated.

Web-enable emails

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

Global Matter History

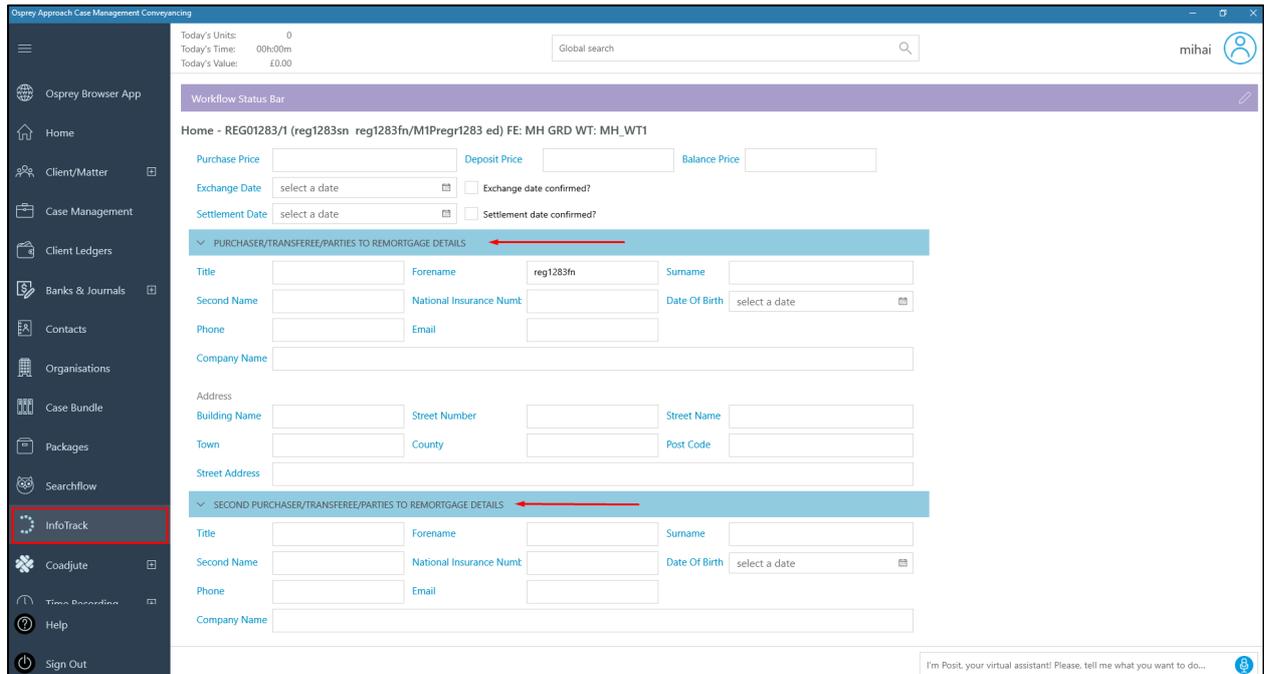
A checkbox has been added, when viewing the matter history, to enable the global matter history to be accessed from the app.



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.

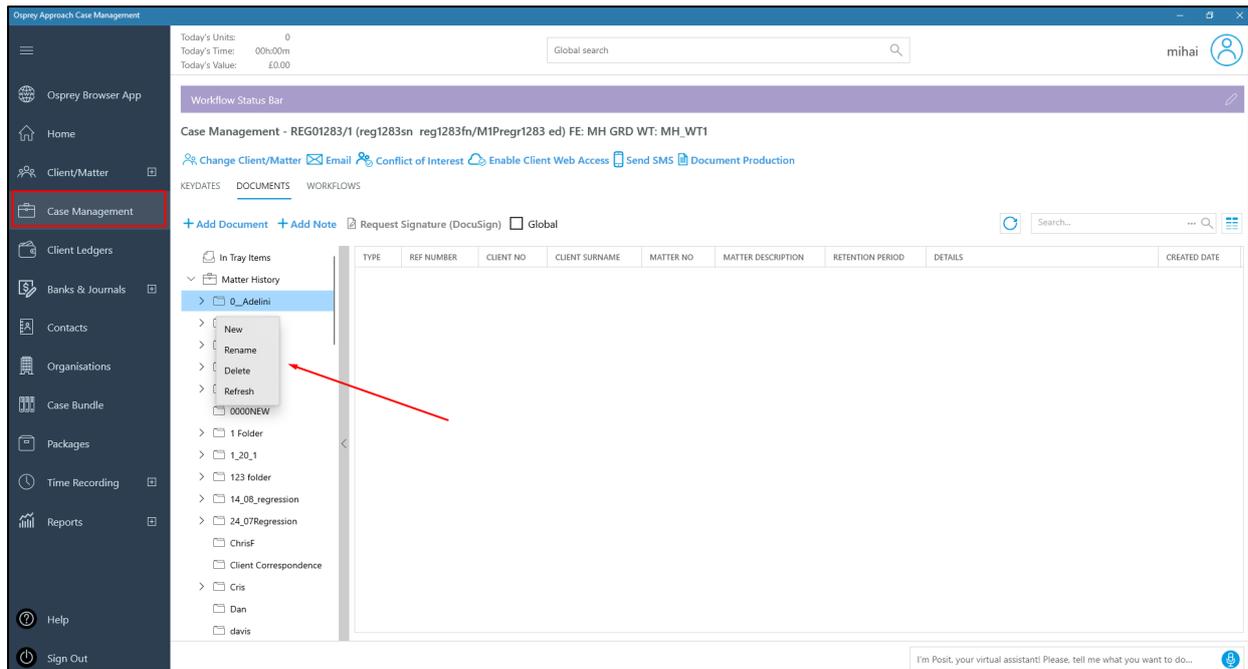
In this update, the labels have been updated.



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

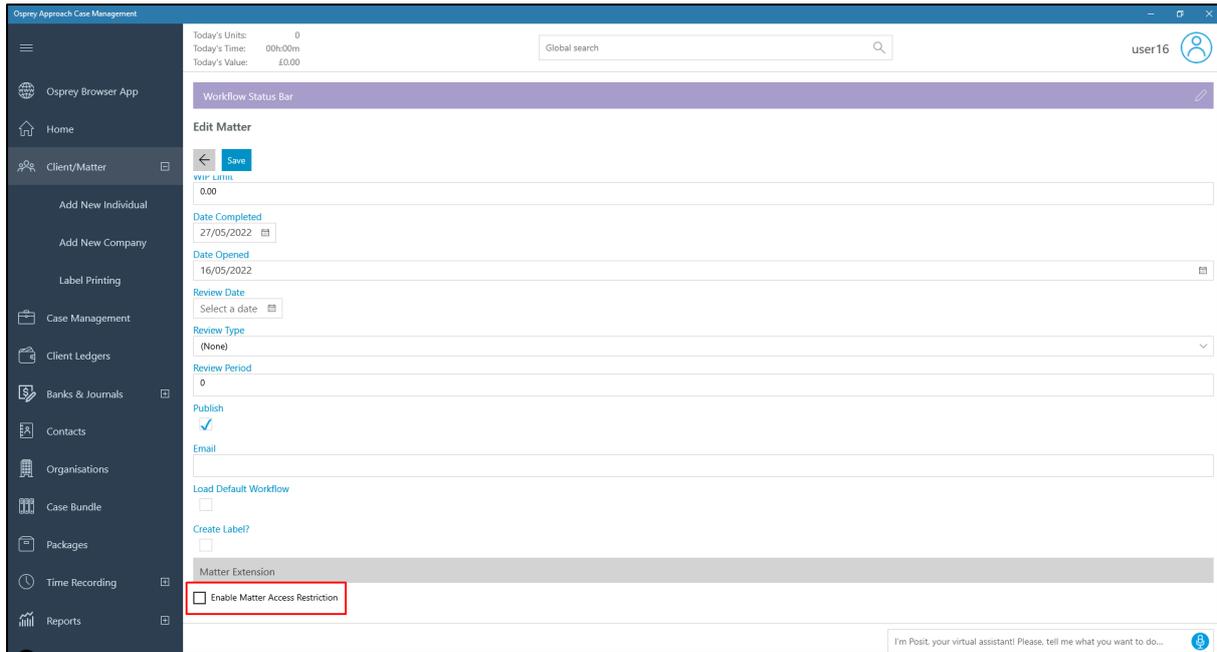
Previously, if a bill was saved on the PC, Osprey would show that there was already a document open for editing.

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

Matter Restrictions Switch

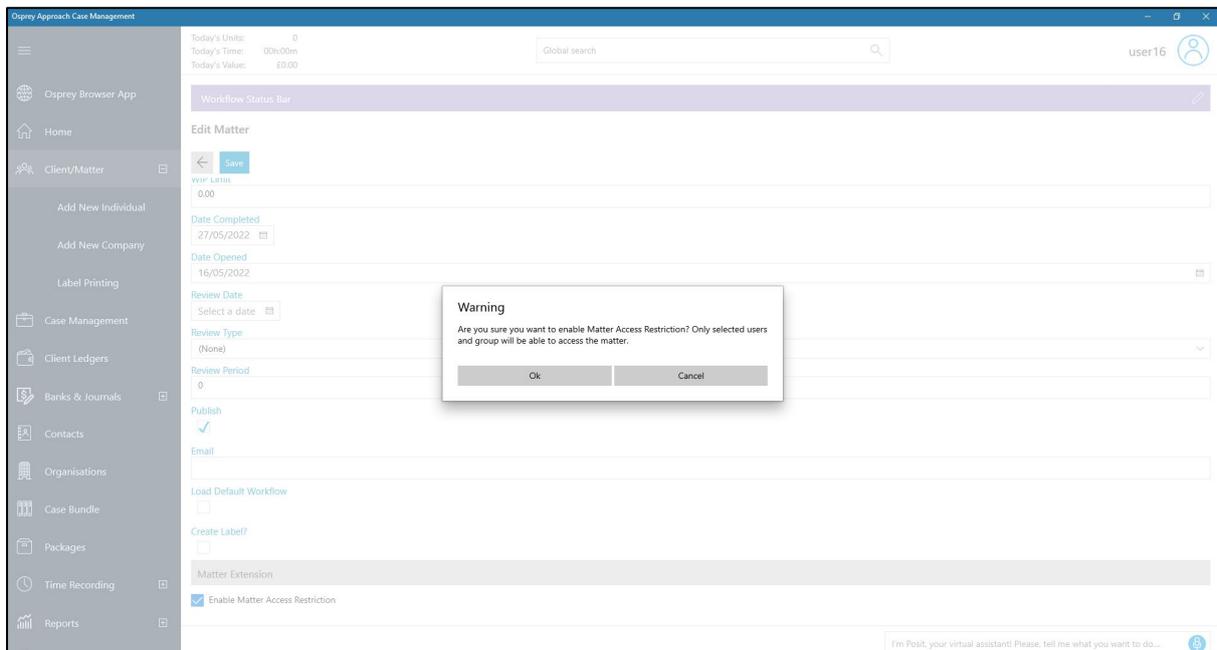
Previously, newly added users were automatically restricted from certain files.

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

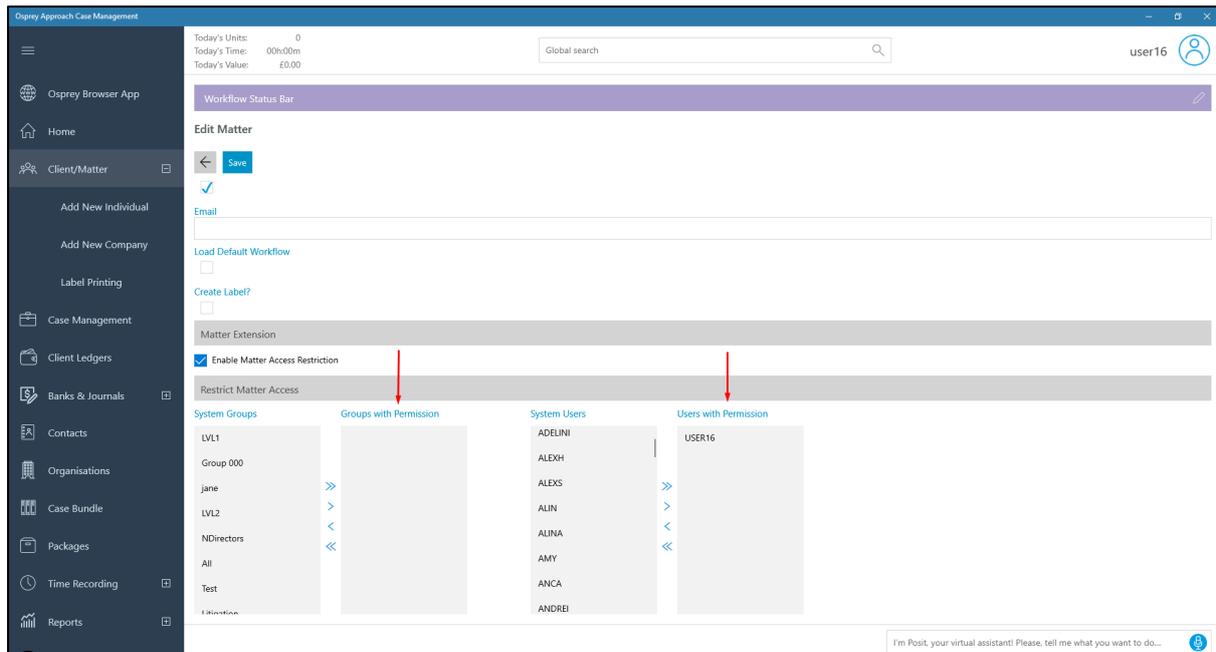


The checkbox is unticked by default. If the matter is saved with this unticked, no restrictions are applied. Newly added users are no longer restricted to matters that had previously been edited.

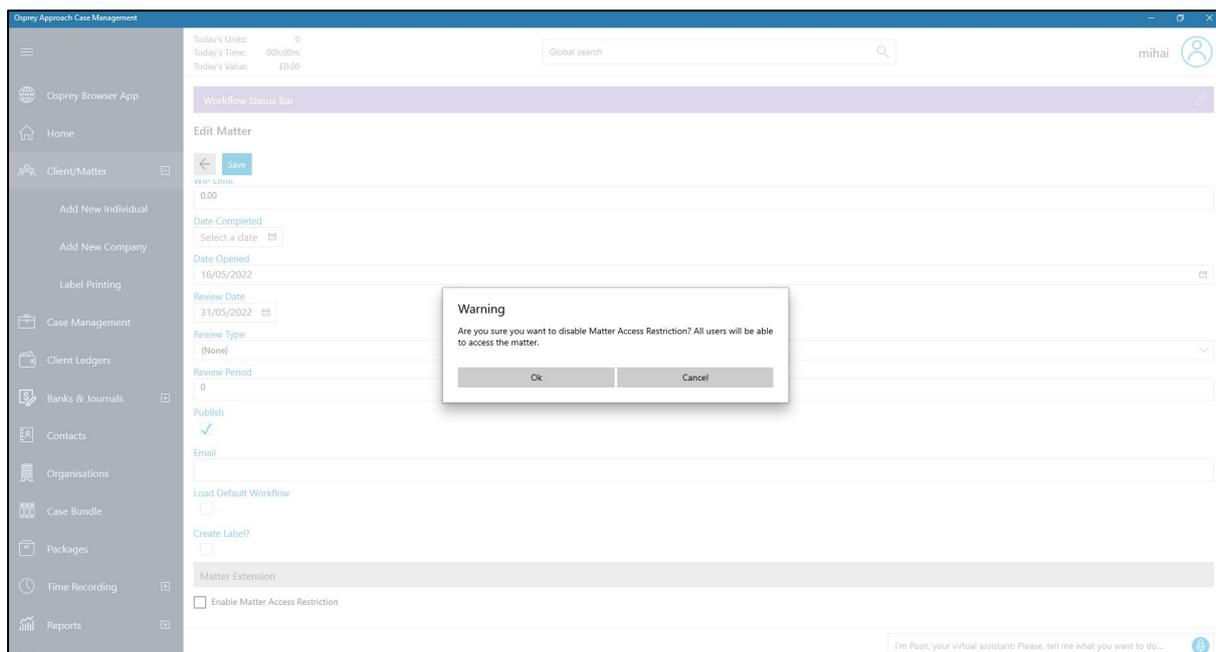
After this checkbox has been ticked, the user will be met with a confirmation to confirm and select 'ok'.



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.

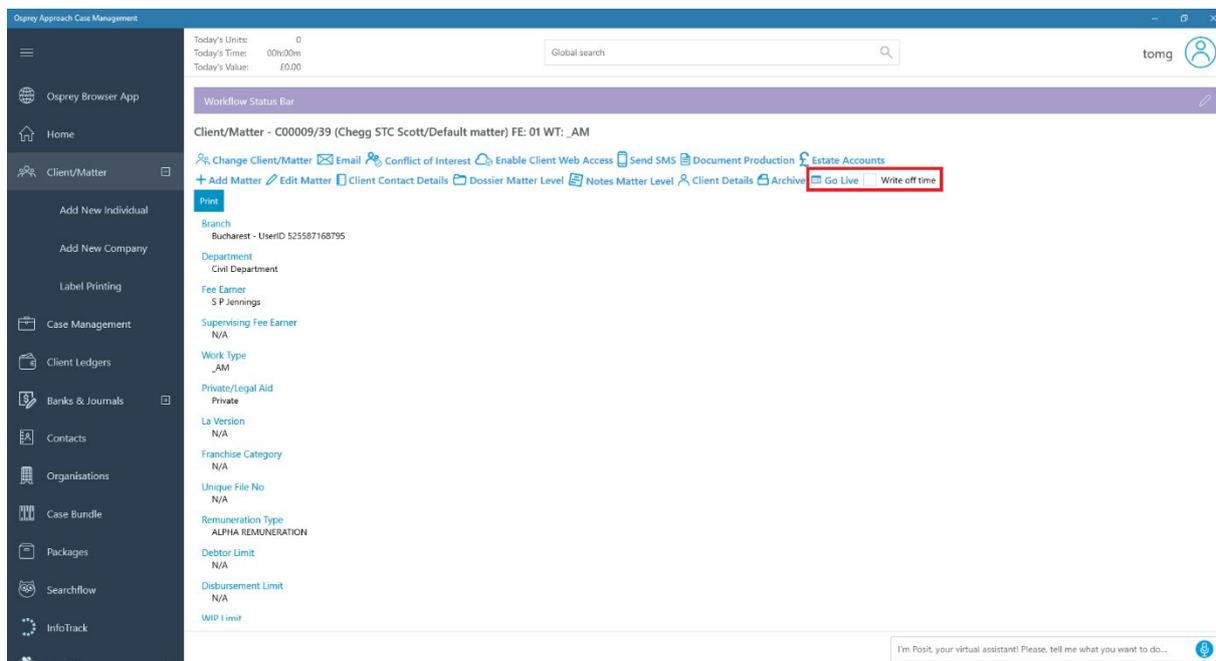


The Matter Restriction Audit for Osprey Approach Browser version (Reports > Miscellaneous Reports), records enabling and disabling matter restrictions.

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.

Osprey Approach Case Management

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

Global search

tomg

Workflow Status Bar

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

Change Client/Matter Email Conflict of Interest Enable Client Web Access Send SMS Document Production Estate Accounts

+ Add Matter Edit Matter Client Contact Details Dossier Matter Level Notes Matter Level Client Details Archive Go Live Write off time

Print

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.

Osprey Approach Case Management

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

Global search

tomg

Workflow Status Bar

Packages - ARCHIVED: 000002/2 (Jones C Cynthia/Default Matter) FE: MB WT: FW_DR

Save

Package Type:
 ZIP
 PDF

Expire Date:
 No expire date
 Expire by

Prefix Package Reference Numbers:
 True
 False

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