Osprey Approach: Client & Matter Workspaces

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Osprey™ Approach

An easier way to manage your clients and matters

Released February 2025

Osprey's client and matter workspaces are designed to make it easier and quicker to access the tools and data you need to manage your workload. A now one-stop shop for all your data, related details, workflows, documents and key dates.

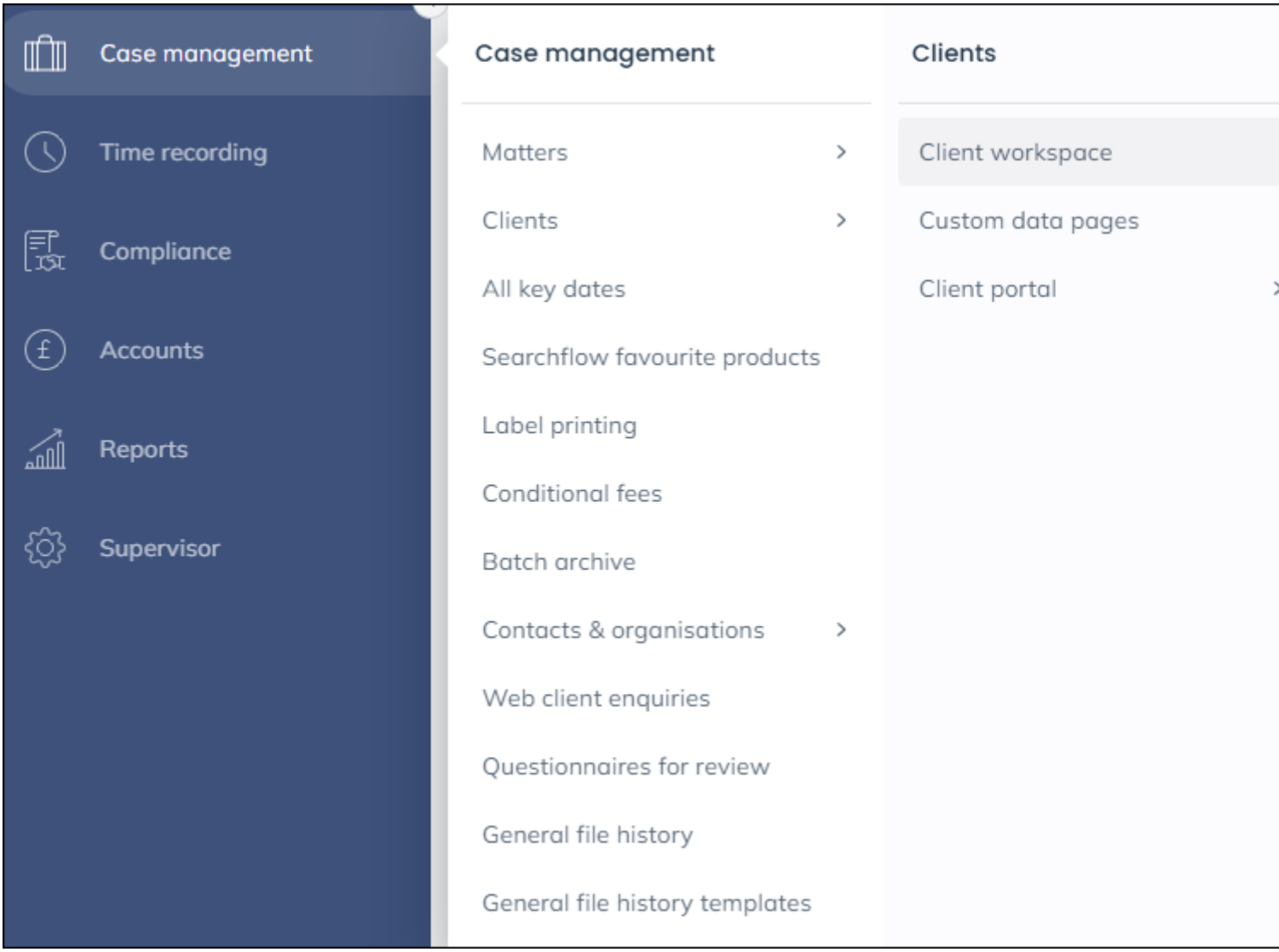
This guide showcases the features within each workspace to help you save time and deliver excellent service.

GET STARTED

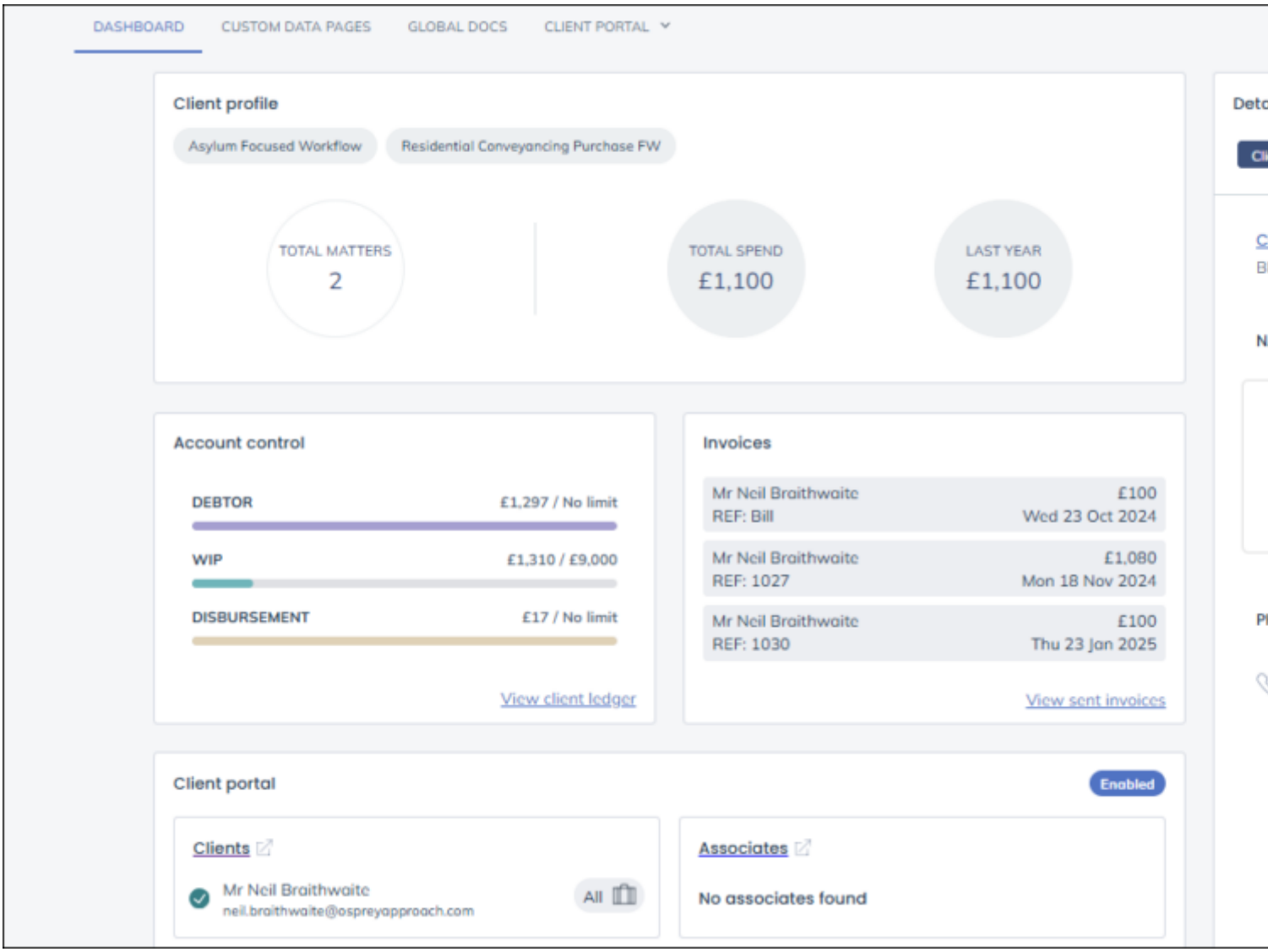
The client and matter workspaces are only available on v1.5. Contact your CSM or the support team to get access to the new client and matter workspaces and start your migration to v1.5.

Client workspace

To open the client workspace, from the menu choose, Case management > Clients > Client workspace

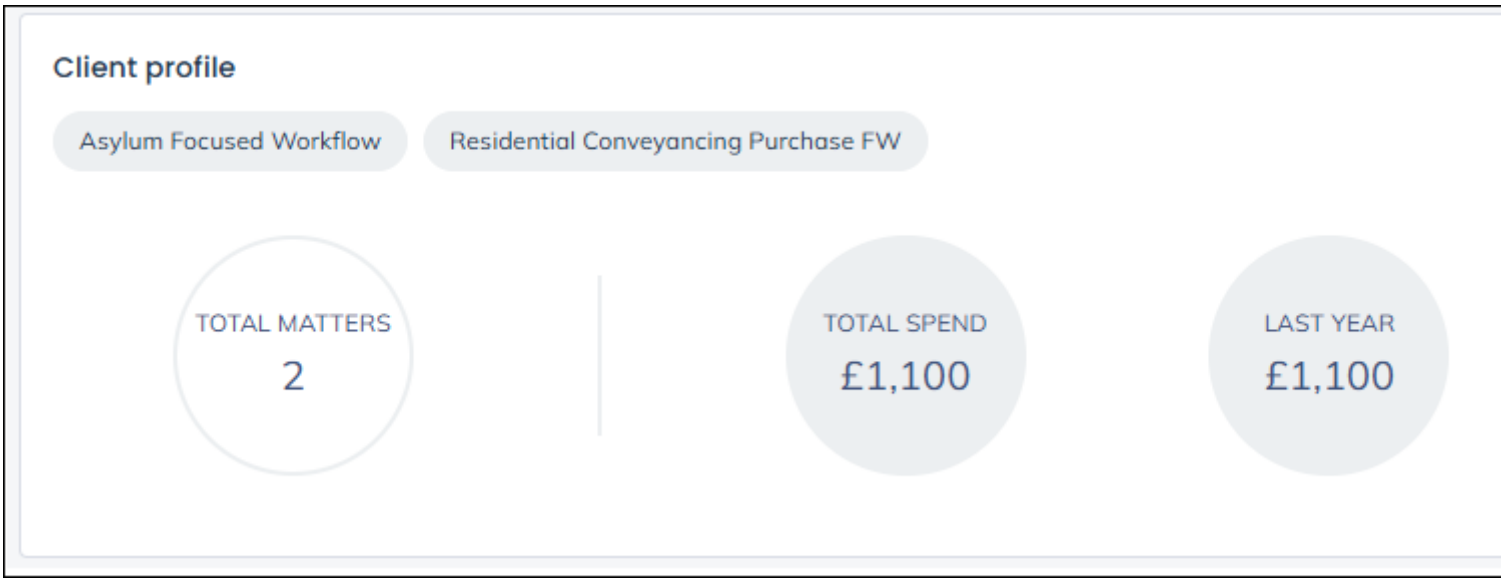


The client workspace provides easy access to global custom data pages, global documents, account control details, invoices, and options for the Client Portal. Not only do you have key dashboard reporting options and data displayed on the client workspace, but there is now a simple navigation tabs across the top which help you navigate across the tools required to manage your clients.



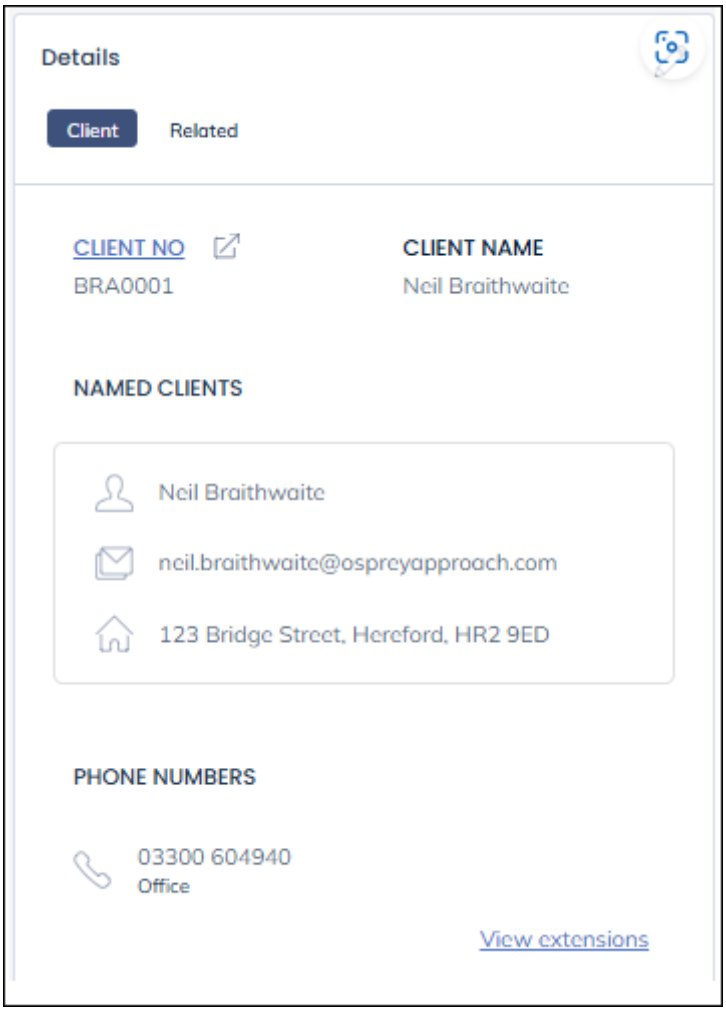
Client profile

On the dashboard, the client profile displays the work types used for matters with that client to identify the work that has been completed for this client, the total number of matters, total spend, and last year spend.



Details panel

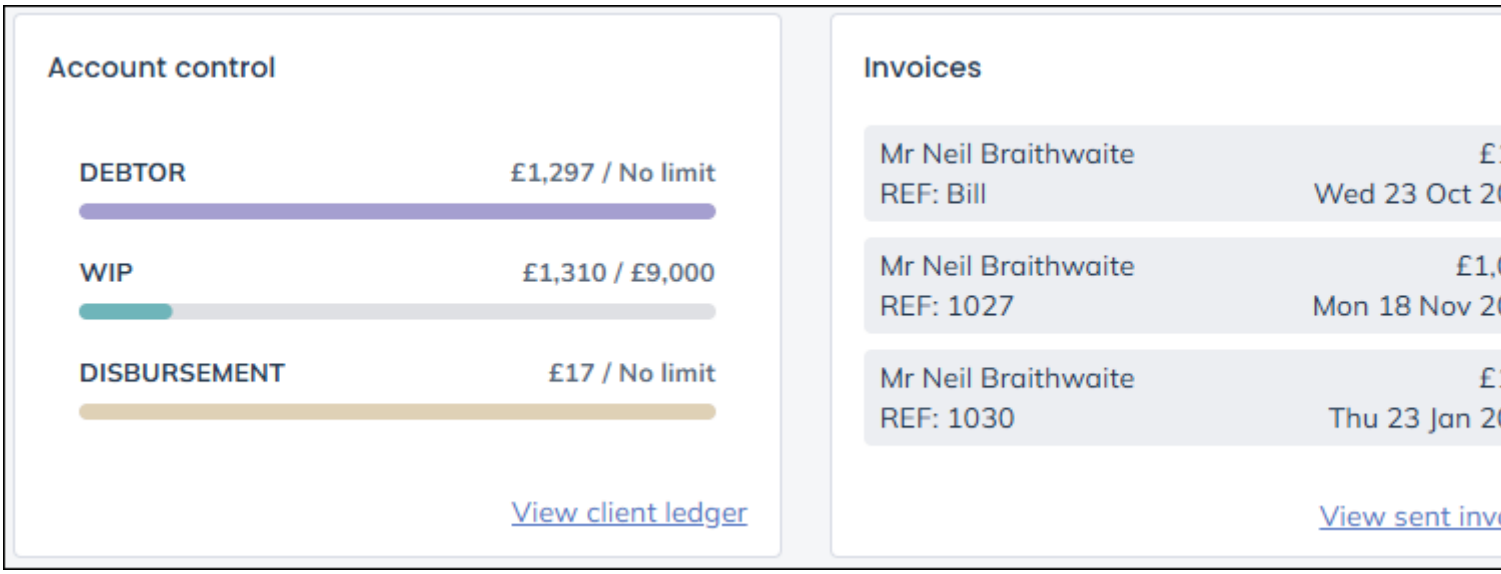
The details panel shows all the contact information for the client, if you need to change these you can click the edit (pencil) icon to do so. Choosing the 'related' tab in this panel will list all the matters for the selected client. At the bottom there's an option to view custom data extension by choosing View extensions. Each detail on this panel can be copied with one click.



Account controls & invoices

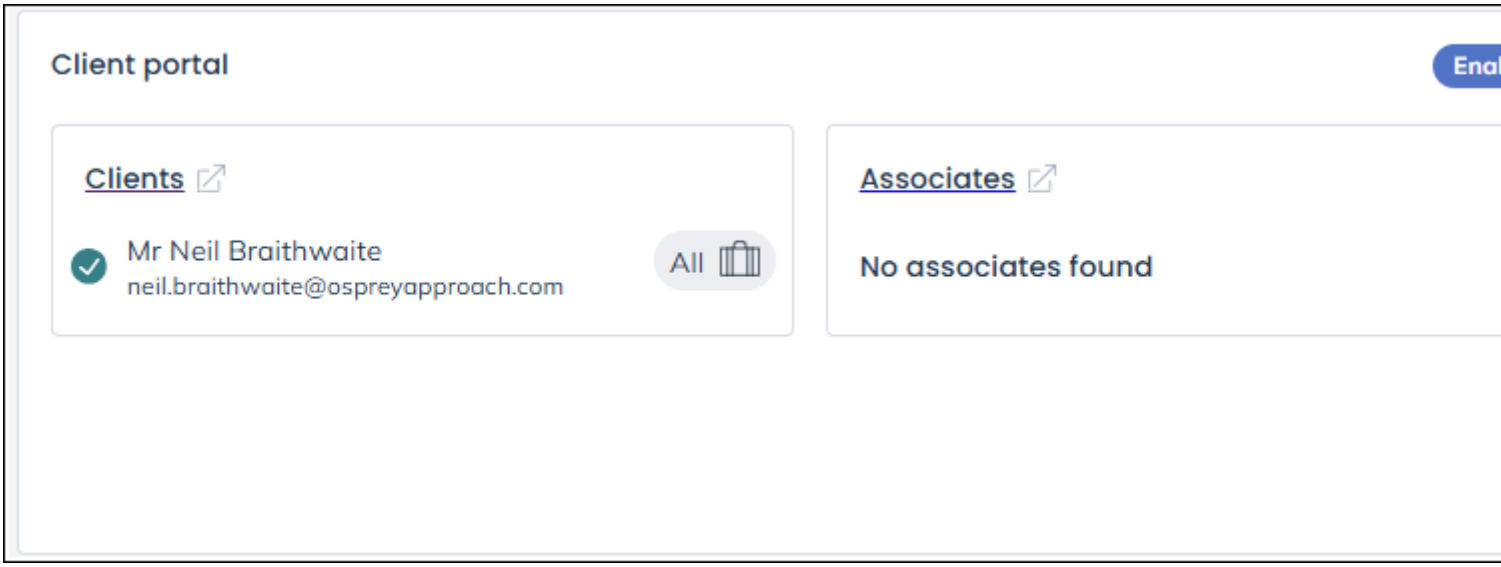
The account control section will present the live debtor, WIP and disbursement amounts against the limits you have set at client-level. If no limit is set, this will be easy to identify too. Easily load the clients ledger by clicking 'View client ledger'.

The invoices panel shows a history of all invoices sent to the client, including paid and unpaid. View sent invoices to load the Matter History to review the saved documents.

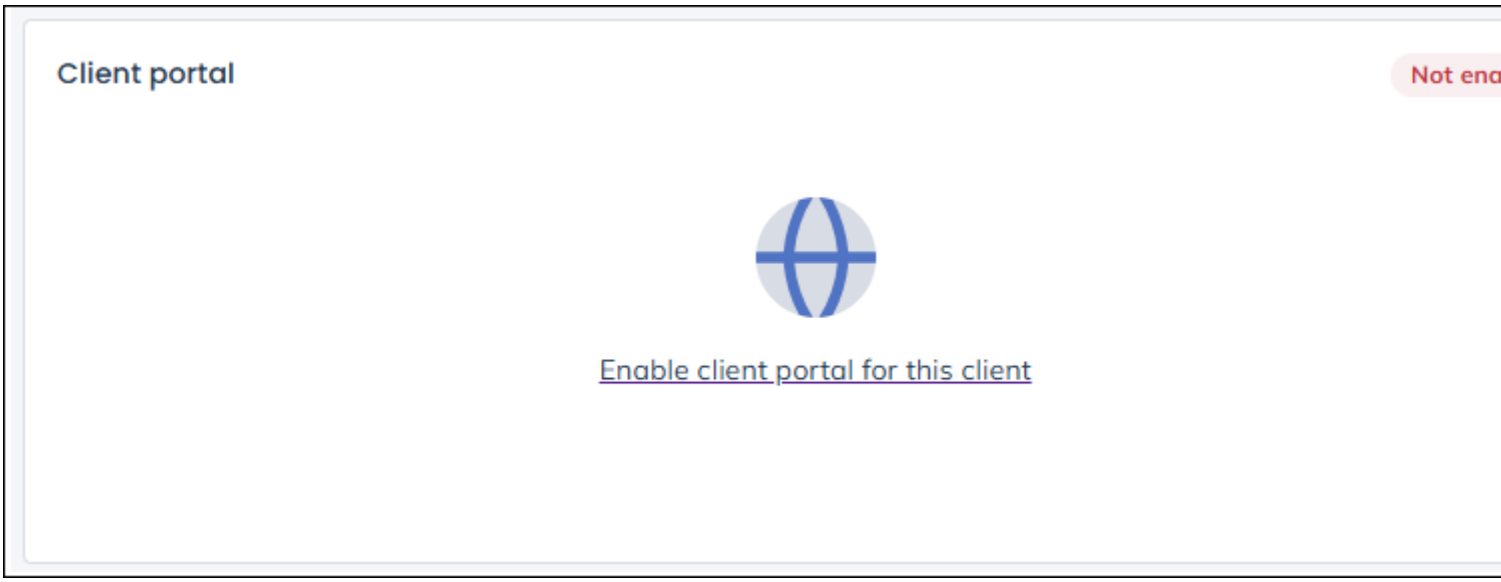


Client portal

The client portal panel displays whether the client is enabled to access the portal. If the web portal has been enabled for the client you'll see the associated name and addresses of those with access.

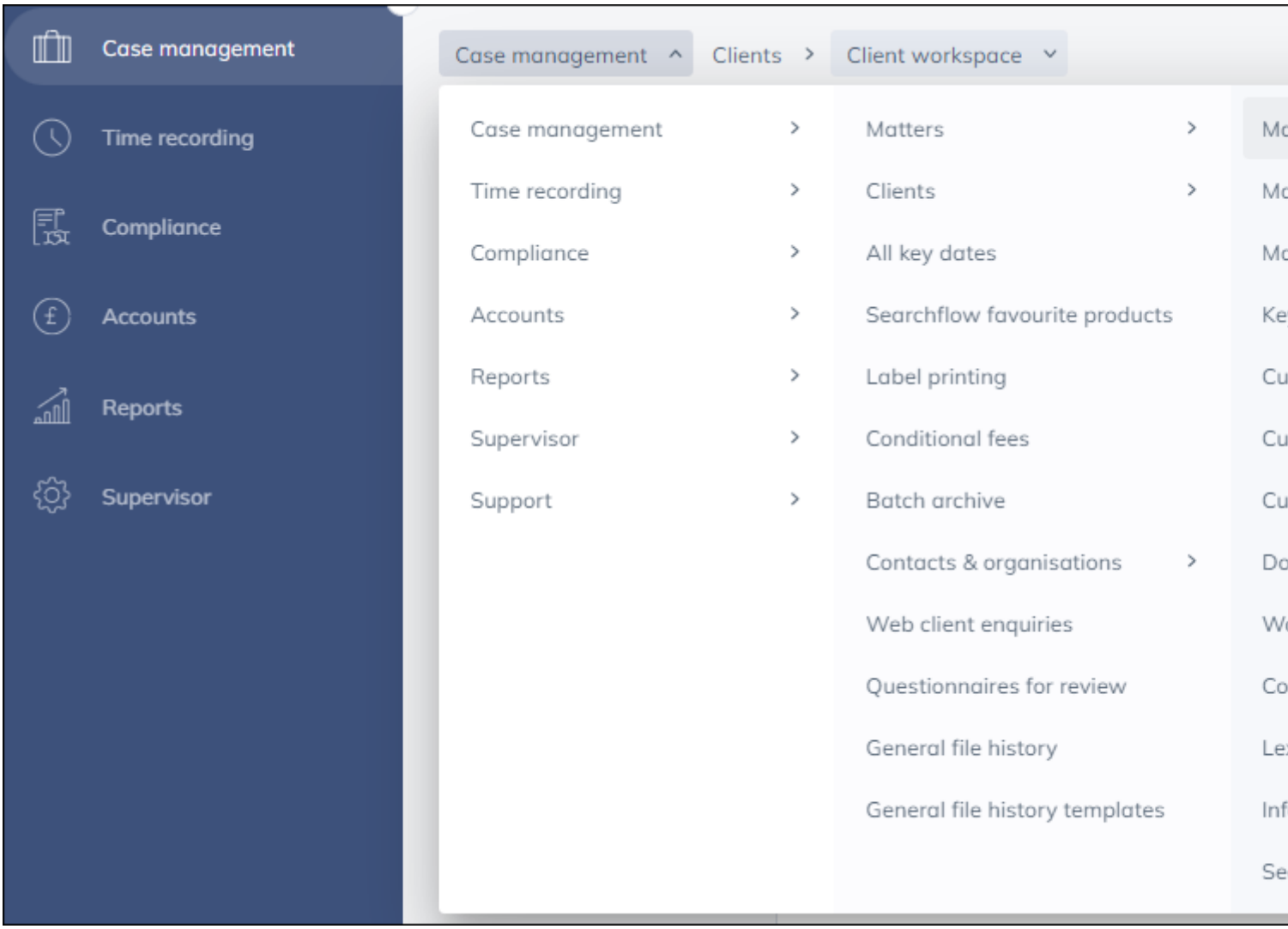


If it has not been enabled you will see an option to enable access to the portal.



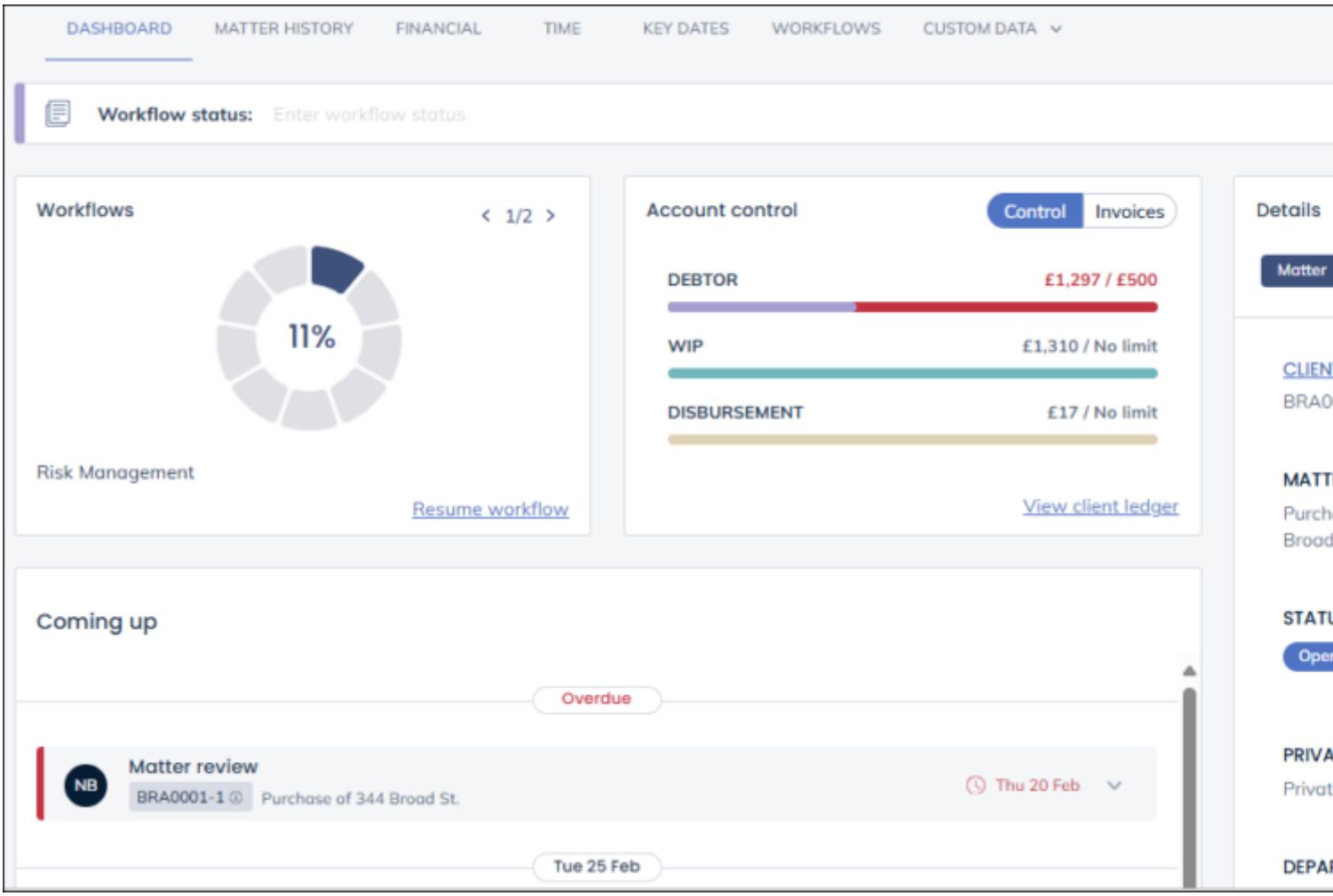
Matter workspace

You will find the matter workspace by going to Case management > Matters > Matter workspace



The matter workspace provides easy access to Matter History, Financial (Client Ledger), Time, Key Dates, Workflows and Custom Data relating to the matter. Not only do you have key dashboard reporting options and data displayed on the client workspace, but there is now a simple navigation tabs across the top which help you navigate across the tools required to manage your clients.

The navigation tabs will remain as you switch between tools so it's quick and easy to manage matters.



Workflow status bar

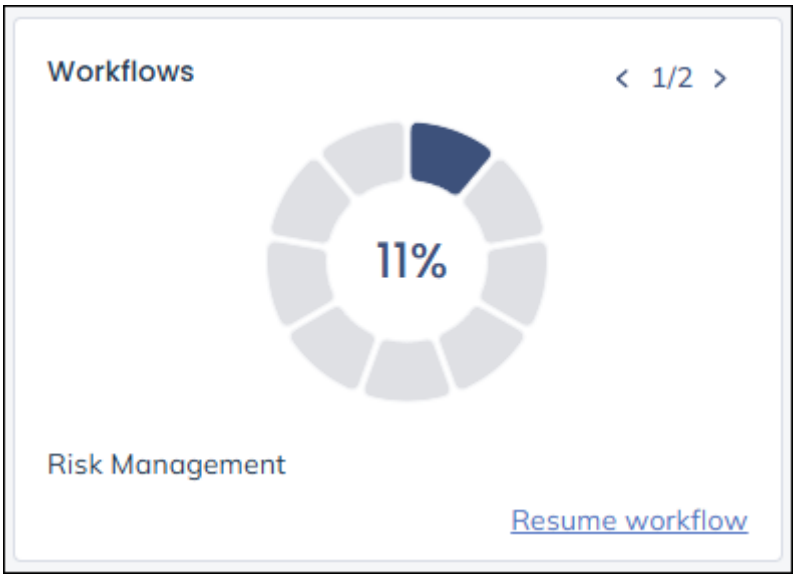
The workflow status bar is a signpost for important information on the matter. The status bar is visible at the top across all key tools you'll need to manage a matter including the Dashboard, Matter History, Financial, Time, Key Dates, Workflows and Custom Data.

Clicking the edit (pencil) icon allows you to add or change the displayed message. The bin icon will remove any shown message. The status can be updated manually or automatically via a workflow

Workflows

The workflows panel displays the progress percentage of each related workflow for that matter. From the panel you can resume a workflow, and easily complete the next task with one-click.

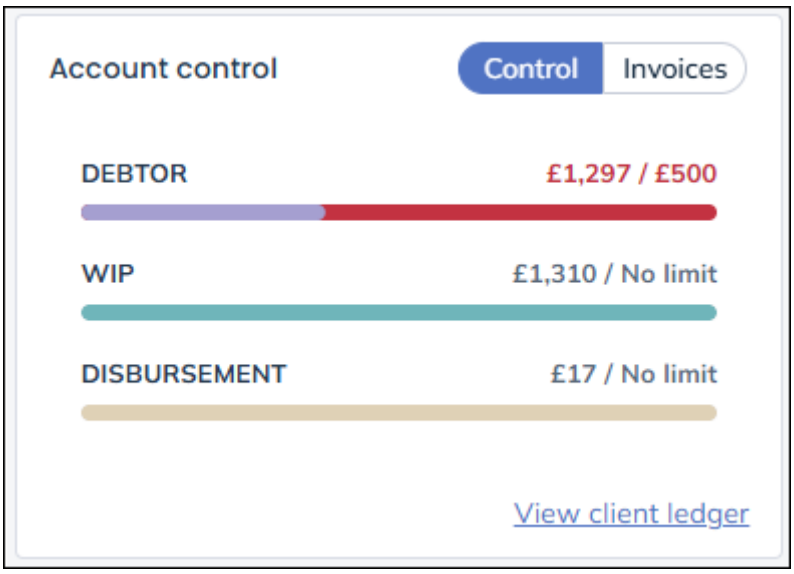
If you have multiple workflows loaded to the matter, the workflows panel will become a carousel to enable you to click through the workflows to see the progress of each.



Account control & invoices

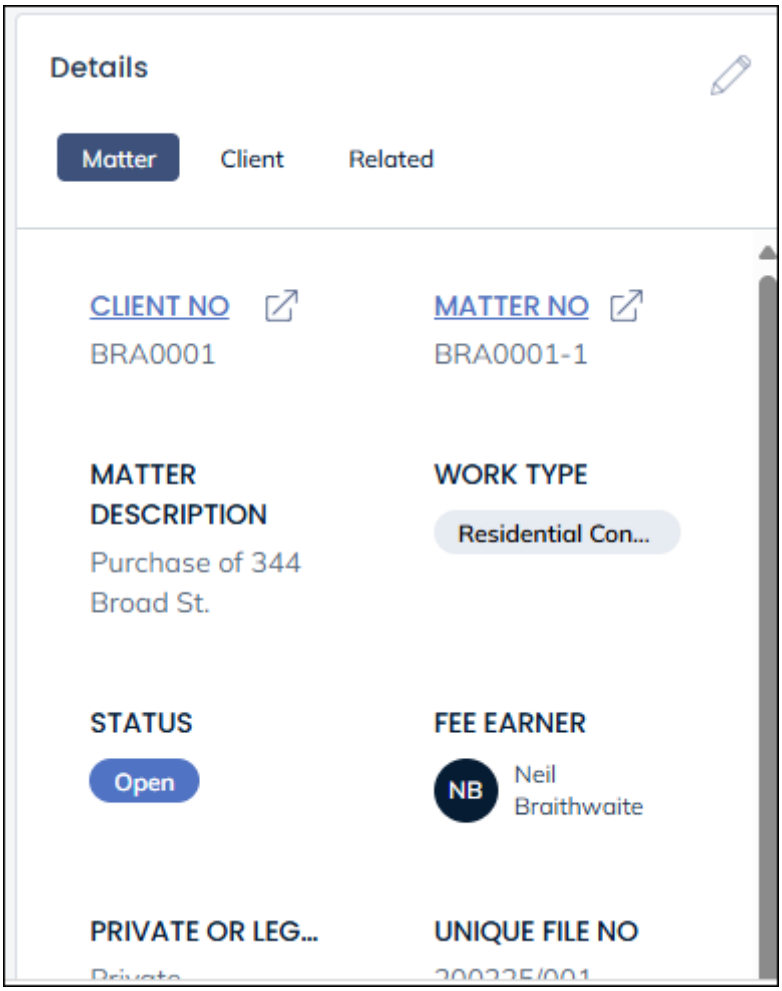
The account control panel displays both the matter limits and invoices. The account control section will present the live debtor, WIP and disbursement amounts against the limits you have set at matter-level. If no limit is set, this will be easy to identify too. Easily load the clients ledger by clicking 'View client ledger'.

Switch to the invoices panel to show a history of all invoices raised against the matter, including paid and unpaid. View sent invoices to load the Matter History to review the saved documents.

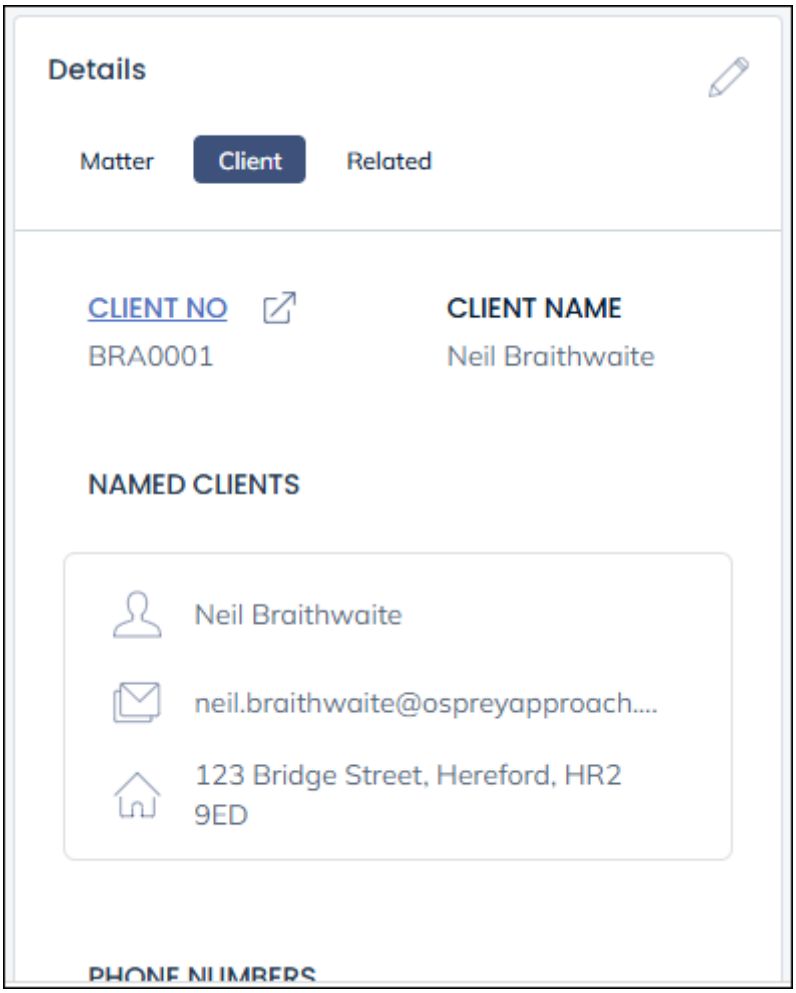


Details panel

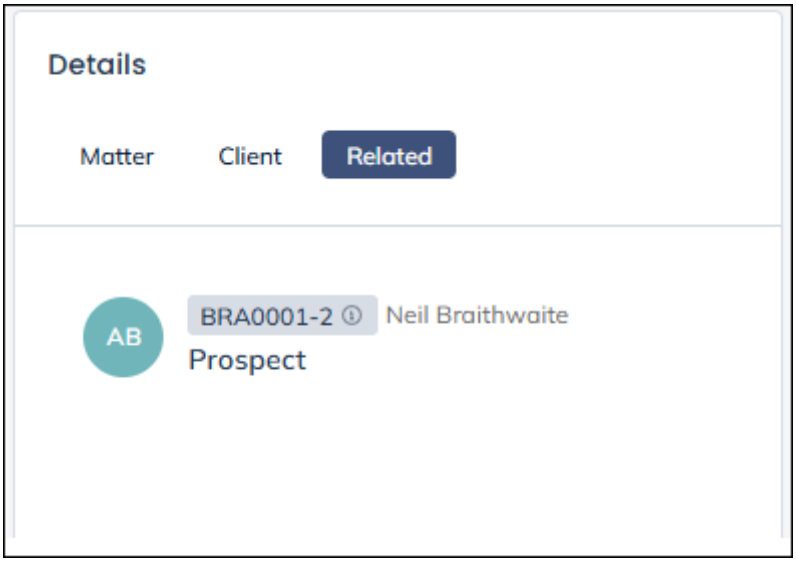
The Details panel presents useful information for the selected matter. Details can be updated and changed from this panel by clicking the edit (pencil) icon.



The matter and client tab displays important matter related details and then associated client details. All data can be copied with just one-click.



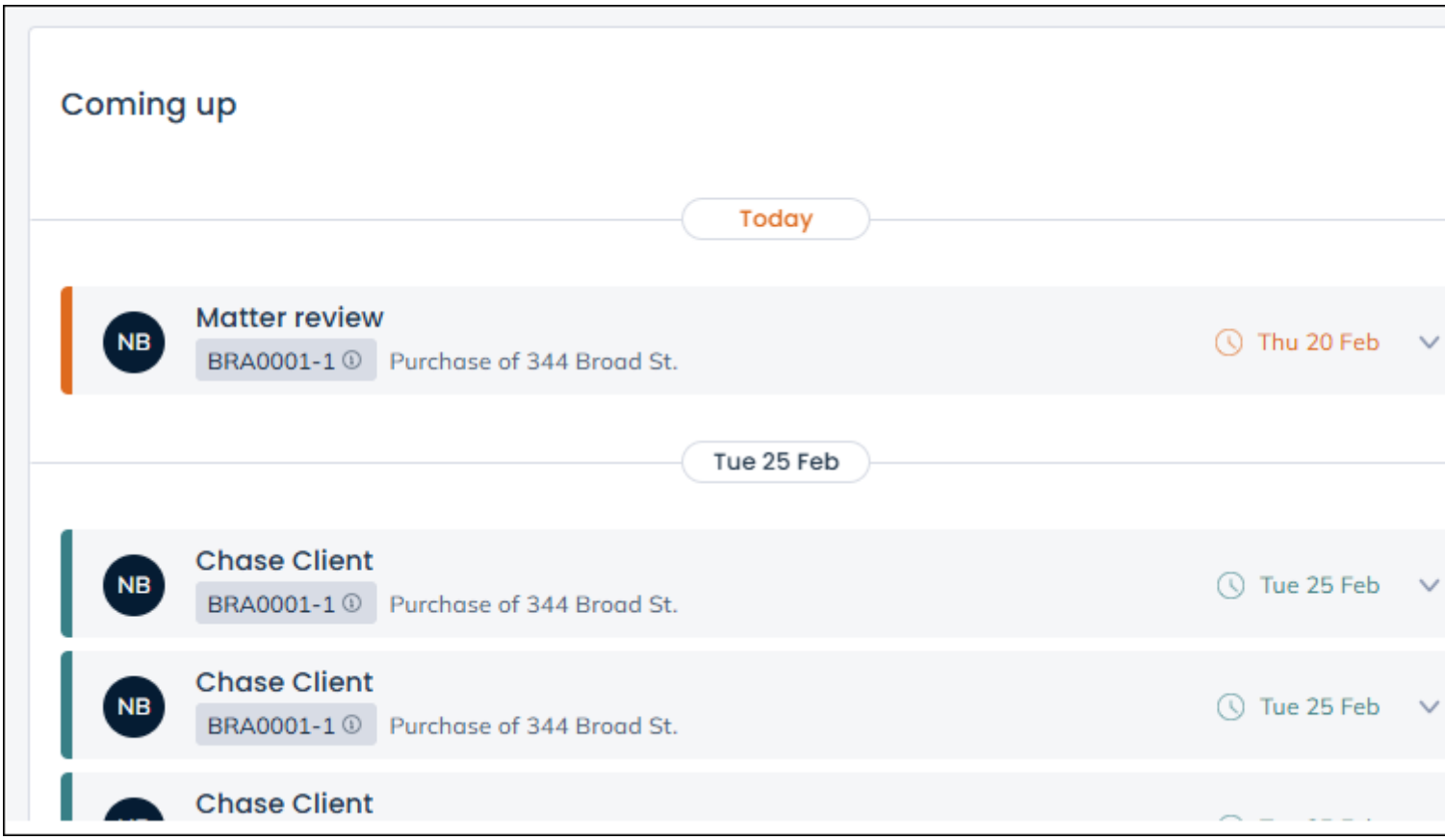
The related tab will list all other matters for the selected client.



At the bottom there's an option to view custom data extension by choosing 'View extensions'.

Coming up

The coming up panel will show outstanding key dates and matter review tasks for the matter including overdue, today's tasks, and upcoming actions. Simply click on each key date to view additional information.


Coming up
Today
NB
Matter review
BRA0001-1
Purchase of 344 Broad St.
Thu 20 Feb
Tue 25 Feb
NB
Chase Client
BRA0001-1
Purchase of 344 Broad St.
Tue 25 Feb
NB
Chase Client
BRA0001-1
Purchase of 344 Broad St.
Tue 25 Feb
Chase Client