Osprey Approach: Glossary

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A guide to legal case management software and Osprey terminology, containing definitions of terms related to legal tech and Osprey's features and functionality.

Press Control + F to perform a search.

A - C

Actions (Workflows)
A Workflow action is the singular operation within a workflow task, such as generating a document, composing an email, or capturing of data via a questionnaire.

Access Template
An Access Template dictates what area(s) of Osprey a specific group of users can access when using Osprey from a Web Browser.

Activity Code (Time)
The activity performed when recording time on a client's matter.
I.e. Email in, Travelling, Waiting

Add-in
An installable program that enhances functionality of other programs.

Aged Debtors
Clients who have outstanding bills to pay.

Archive
Archiving within Osprey will hide items from general user view without deletion of data.
This can relate to archiving clients, fee earners, users and more.

Associates
Third-parties who may be associated with a matter.

Backup Site
A secondary backup URL, allowing users to access Osprey if your primary site URL is inaccessible.
*https://**yourfirmname**.ospreyapproachbackup.com/main*

Case Bundle
A Case Bundles is a PDF documents, made up from items stored within the Matter History, created with an index and bookmarks. Also known as a court bundle.

Cash Accounting
Method of VAT where payment of VAT is not due until the invoice has been paid.

Client
The person(s) requesting for your firm's services. Usually denoted within Osprey with a unique client number.

Client-level
Client Level refers to information relating to the client and would not change between areas of law.

Examples may include date of birth, passport number, nationality.

Client Number
A unique identifying number assigned to the client.

COM Add-in / Connector
A COM add-in is a type of program that can extend the functionality of Microsoft Office applications, such as Word, Excel, PowerPoint, and Outlook. A COM add-in can add custom commands and features to the Office user interface, such as menus, toolbars, buttons, or task panes.

Convert 2 Client
A digital onboarding portal that can be embedded into your website, allowing potential clients to raise enquiries and generate conveyancing quotes.

Client View
Non-editable customised view of client information through workflows and the web portal.

Custom Questionnaires
A customisable form that is completed via a workflow. The custom questionnaire consists of pre-defined dossier field information. When the questionnaire is complete, the information is automatically stored in the client or matter area.

Contacts
Third-party Individuals who can be linked to matters.

D – F

Deal Room / Document Sharing
Located within the Osprey Web Portal, the Deal Room provides the ability to upload and collaborate on documents. Users will see "Document Sharing" within the web portal.

Dossier Field
An individual field that holds data relating to the matter, such as an email address, date, value such as text or monetary amounts, contact or organisation.

Dossier Page
A grouping of up to twenty dossier fields, which can be linked at a client level, or to specific work type(s) to use at matter level.

Extensions
Extensions are available at two levels, Client, and Matter.
These can display specific dossier fields on the client or matter page.

Extension (Client)
These offer shortcuts to quickly populate selected client level dossier fields, relevant to the client. These can be set for Individuals, Companies or both.

Extension (Matter)
These offer shortcuts to quickly populate selected matter level dossier fields, relevant to the area of work.

Fee Earner
Person who can be assigned matters in Osprey and can time record.
This can relate to either:

- Supervising Fee Earner (supervisor assigned to the matter),
- Matter Fee Earner (person assigned to the matter for day-to-day conduct),
- Time Fee Earner (person not assigned to the matter but can record time entries for work carried out)

File System / General File System
Document storage for non-case related documents (*e.g. internal company documents*).

Financial Access Template
Dictates what financial access a user has. This can include out-of-period postings and running Period End.

Focused Workflow Pack
Osprey's pre-built workflows, each focusing on specific areas of law, which can be further amended by a system supervisor.

G – I

Go Live
The process of converting a prospect client to an active client.

Integration
Third-party software or service embedded into the Osprey solution to utilise shared data or improve joint functionality.

J – L

Key Date
An important date throughout the course of the matter. A Key Date can also refer to an upcoming task or requirement.

Key Date Summary
A filterable report to show key dates assigned to a specific fee earner.

M – O

Main Site
The primary URL to access your firm's Osprey system.
*https://**yourfirmname**.ospreyapproach.com/main*

Matter
The individual case associated with the client. Clients can have multiple matters, and is denoted as /1, /2...

Matter History
Library of uploaded correspondence and digital files that relate to the matter, shown in reverse-chronological order.

Matter-level
Details linked to the matter, such as the property price within a conveyancing matter, other side details.

Matter Restriction
The ability to restrict access to a matter for specific users.

Matter View
Non-editable customised view of matter information through workflows and the web portal.

Osprey Gateway
An installable program that runs in the background, allowing users to produce Osprey documents in Microsoft Word from the Web Browser.

Outlook Add-in
An add-in that enable users to extract / import data to and from Osprey directly from Microsoft Outlook.

Office 365
Microsoft's Online Office suite.

Office 365 Add-in (Word and Outlook)
An add-in designed for Office 365 online users to extract and import data between Osprey directly from Microsoft.

Organisations
3rd-Party Companies that can be associated to a matter.

Osprey Web App
Osprey when accessed from a web browser *(i.e., Google Chrome, Microsoft Edge)*

Osprey Desktop App
Osprey when accessed from the dedicated Windows Case Management app.

Osprey Mobile Portal App
Dedicated mobile portal app, available to download on Google Play and Apple App stores.

Online Editor
A built-in alternative to Microsoft Word, allowing users to create and amend documents directly from Osprey.

P – R

Package
A collection of files collated into a single PDF, or a ZIP file, which can be sent and downloaded from a unique URL.

Prospect Client
A potential client which you can convert to a live client at the point of instruction.

Prospect Matter
A matter where the client has yet not instructed the firm to act.

Remuneration
The hourly charge rate for a fee earner's time recording.

S – U

Sideload
Sideloading apps is the installation of an app on a device without using the official app store of the device's platform (i.e. Windows Store).

Smart Actions
Smart Actions allows for bulk entry of data from a CSV into Osprey.
These are broken into 4 categories:

- Smart Actions: Auto Billing for preparing bill postings
- Smart Actions: Client and Matter Import for importing client and matter information
- Smart Actions: Matter History Notes for adding matter history notes onto files
- Smart Actions: Timesheets for posting time entries

System Supervisor
User(s) with the supervisor access template assigned.

Task (Workflow)
A group of actions to be performed at a specific phase of a workflow.

Units (Time)
Six-minute time unit, used for time recording.

V – Z

VAT Registration Type / VAT Method
Configuration setting to record the method of calculating VAT.

Web Portal
Secure online portal allowing clients and third parties to access and exchange documents and messages, and view the progress of their matters.

Web Publishing / Web Enabling
The act of sharing information to the web portal so associated clients and third-parties can view it.

Web Questionnaires
Digital questionnaires that can be completed by the client, through the client web portal.

Workflows
A schedule of tasks, containing individual actions that are performed. Some actions can be set to only run when pre-determined criteria is met.