



# Osprey Approach: Glossary

This help guide was last updated on  
Apr 24th, 2024

The latest version is always online at  
<https://support.ospreyapproach.com/?p=55316>



# 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**

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

**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**

Sideloaded 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.