



# Osprey Approach: Glossary

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<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

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### **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**

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### **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

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### 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

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### 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

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### 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**

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### **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**

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### **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**

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### **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.