

Osprey Approach: Granting Client Access to the Web Portal

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The latest version is always online at
<https://support.ospreyapproach.com/?p=30909>



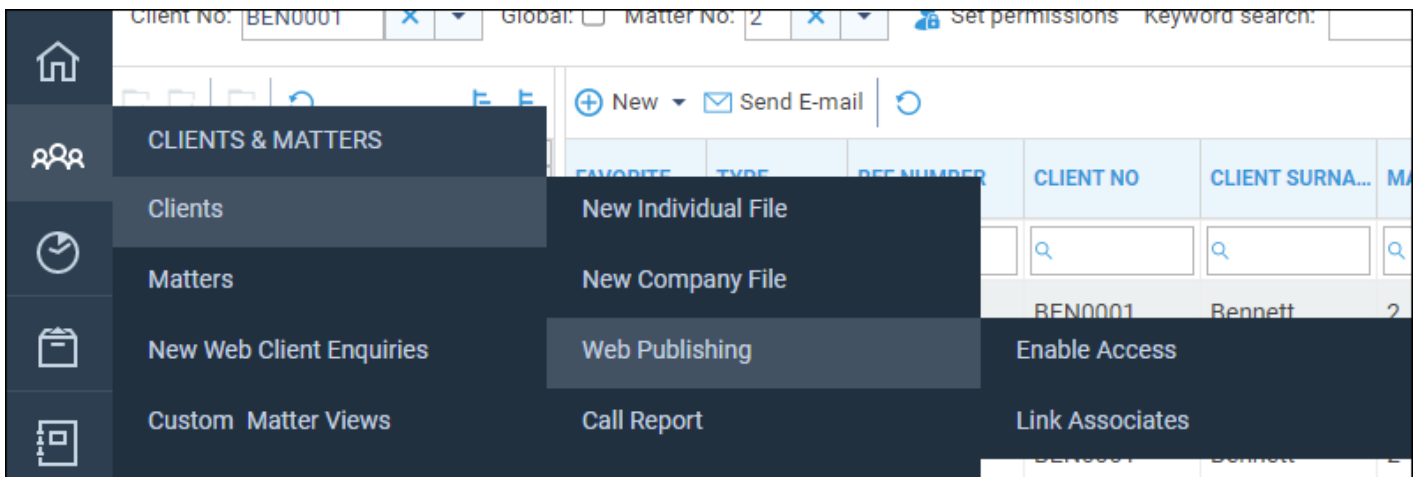
Web enabling your clients and matters

A client must be web enabled in order to grant them access to the Web Portal. Once enabled, you can then decide which matters belonging to a client are visible via the web portal.

To web enable a client, firstly ensure you have the primary client email address added to their file, you will not be able to Web Publish a client without one.

Browser

To web enable a client, ensure you have the relevant client selected and then navigate to Clients & Matters > Clients > Web Publishing > Enable Access



Once you have selected enable access, select a suitable Client Security Level and click 'Save'. The client will then receive an automated email with their login credentials.

A screenshot of the 'Enable Access' form in the software. The breadcrumb trail at the top reads 'Clients & Matters > Clients > Web Publishing > Enable Access'. Below this are 'Save', 'Cancel', and 'Delete' buttons. A light blue informational box contains a warning icon and text: 'This facility is to allow your clients to view their details via the internet. By publishing the client you will allow them to view Workflow, Key Date and Client information simply by logging into your web site. A default password will be generated to allow your clients to log in.' The form fields are: 'Client No:' with value 'BEN0001'; 'Client Email:' with value 'jessica@pracctice.net'; 'Client Security Level:' with a dropdown menu set to 'Client'; 'Generated Name:' with an empty text box; 'Memorable Data:' with value 'AQAAANCMnd8BFdERjHoAwE/CI+sBAAAA'; and 'Reset Password:' with an unchecked checkbox.

If a client forgets their password, it can be re-set by selecting the check box 'Reset Password' by navigating to Clients & Matters; Clients, Enable access. Check the box 'Reset Password' and then 'Save'.

To publish a matter, navigate to Clients & Matters and then edit the matter selected.

From here, you can tick the box next to 'Publish'

Clients & Matters

Matters

Edit Matter

Save

Cancel

Client No:

BEN0001

Matter No:

2

Matter Description:

Accident

Prospect matter:

☐

Branch:

2: Malvern

Dept:

1: Civil Department

Fee Earner:

Tom Genever

Supervising F/E:

(None)

Work Type:

Residential Conveyancing Sale

Private Or La:

Private

Remuneration Type:

Standard Remuneration

Debtor Limit:

2000.00

Disbursements Limit:

500.00

WIP Limit:

1000.00

Date Opened:

19/02/2024

Date Completed:

21/02/2024

☐ Clear Date

Date Archived:

Review Date:

12/03/2024

Review Type:

Monthly

Review Period:

0

Publish:

☒

Email:

jessica@pracctice.net

☒ Load Default Workflow

☒ Create Label?

Case Management app

To web enable a client in the app, firstly ensure you have the primary client email address added to their file, you will not be able to Web Publish a client without one.

Osprey Approach (3.0.1)

☰

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS

Add New Individual

Add New Company

Label Printing

TIME RECORDING

CASE MANAGEMENT

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

Workflow Status Bar

Client/Matter - TAR00001/1 (Tarping AT Adam/Client Portal Login Test) FE: ADAMB WT: ADAMB

Change Client/Matter

Email

Conflict of Interest

Enable Client Web Access

Send SMS

Document Production

Add Matter

Edit Matter

Client Contact Details

Dossier Matter Level

Notes Matter Level

Client Details

Archive

Print

Branch

Aberdeen - userid: 044837853251

Department

Civil Department

Fee Earner

AdamB

Supervising Fee Earner

If there are additional parties linked to a file, you may tick their names to also generate credentials for them


Select a suitable Client Security Level

Click 'Save' and the client will receive an automated email with their log in details.

If a client forgets their password, it can be re-set by selecting the slider button for 'Reset Password' by navigating to Clients & Matters; Clients, Enable access. Enable the button 'Reset Password' and then 'Save'.

Web Publishing - Enable Access - Osprey Approach (3.0.1)

Enable Client Web Access - TAR00001 (Tarping AT Adam)



This facility is to allow your clients to view their details via the internet. By publishing the client you will allow them to view Workflow, Key Date and Client information simply by logging into your website. A default password will be generated to allow your clients to log in.

Client Email:

adamb@pracctice.net

Client Security Level:

Client

Temporary Password:

Reset Password

☐

Save

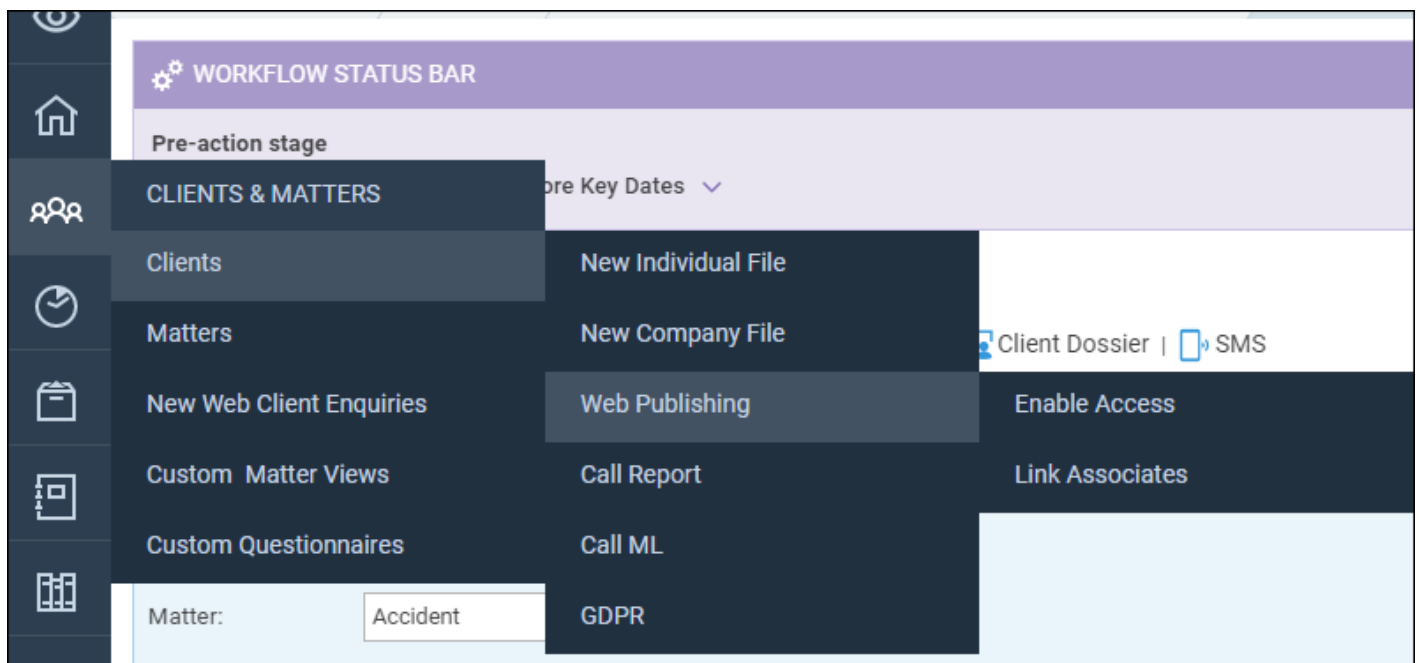
Delete

Cancel

Linking associates to published matters

In order for Associates to be able to view specific client cases via the Web Portal, they must firstly be linked to applicable published matters.

Navigate to Clients & Matters > Clients > Web Publishing > Link Associates



This area will show all of the current clients published matters along with a list of available Associates.

Print Links
 Export

 Associates: Adam Buckley

 Update
 Search..

From this screen you can set up which associates you want to have access to Client : B00002 and which of the enabled matters you want them to have access to.

MATTER NO	MATTER DES	LINKED	LINK/UNLINK	USER ACCESS TEMPLATE
1	Default Matter		<input type="checkbox"/>	Client
7	PRIE matter		<input type="checkbox"/>	Client
8	New Matter		<input type="checkbox"/>	Client
10	Accounts 1		<input type="checkbox"/>	Client

Firstly, select an Associate from the 'Associates' list. Click the Link/Unlink check box to select which matters you wish to Publish to the selected Associate and then link a suitable User Access Template.

Select the 'Update' option to confirm the link.

To unlink an Associate from published matters, select the appropriate Associate from the list. Any linked matters will show a tick in the Linked? Column, to remove this link, check the Link/Unlink box and then select 'Update'.

Web enabling documents from matter history

Any type of document saved within a client's matter history can be Web Enabled and then made visible to a client and any linked Associates via the Web Portal.

When in the matter history, right click the relevant file and select 'Edit Details'

TYPE	REF NUMBER	CLIENT NO	CLIENT SURNA...	MATTER NO	MAT
	122789	BEN0001	Bennett	2	Acci
	122788	BEN0001	<div><div> New</div><div> Send E-mail</div><div> Edit Details</div><div> Clone</div><div> Check Out</div></div>		
	122034	BEN0001			
	122020	BEN0001			

You will then need to tick the box next to 'Web Enabled' and then click 'Save'.

Edit Matter History Item

Client No**:

BEN0001

X

Global: ☐

Matter No**:

2

X

Custom Type:

Folder:

Processed date:

10/04/2024

HH:

13

MM:

03

SS:

17

Retention Period:

Retention Date:

Description

Time Recording Bill

Web Enabled

Web Enabled:

☐


Save

Cancel

Once web enables has been ticked, further information will appear as below:

Web Enabled: ☒

☐ Apply to all users or select from below user list



NAME	PERMISSION
<input type="text"/>	<input type="text"/> All
BEN0001	None

Save

Cancel

This area will show the Client reference and also any linked associates. Ticking the 'Apply to all users' check box will automatically Web Enable the document for all users in the list.

Alternately, you can click 'None' next to a record and select Read/Write to Web Enable for that specific user.

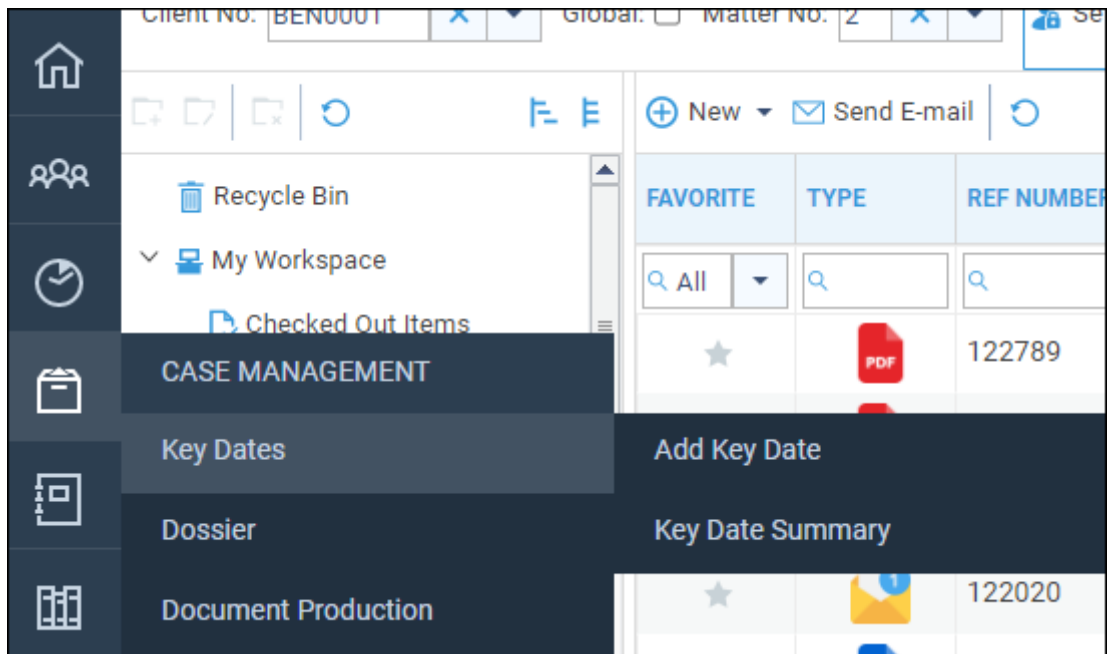
Select 'Save' to save your changes.

To remove the permissions, right click the document and then change Read/Write to 'None' and save.

Web enabling key dates

Key dates can be web enabled in the exact same manner as documents.

Navigate to Case Management > Key Dates > Add Key Date



Enter in the relevant details, then check the box next to 'Published' to reveal the client details and any linked Associates. Click 'Publish to all' and then 'Save' to link all users or change from 'None' to Read/Write against an appropriate user.

Client No	<input type="text" value="WO0009"/>	
Matter No	<input type="text" value="1"/>	
Key Date	<input type="text" value="16/04/2024"/>	
Key Date Type	<input type="text" value="CHASECLI"/>	
Notes	<input type="text" value="Chase client for documents"/>	
Fee Earner	<input type="text" value="RW"/>	<input checked="" type="checkbox"/> Multi Select
Date Met ?	<input type="checkbox"/>	
Create Diary Appointment ?	<input type="checkbox"/> All Day <input type="checkbox"/> At	
Published ?	<input checked="" type="checkbox"/>	
Published to all	<input type="checkbox"/>	
NAME		
<input type="text" value="WO0009"/>		<input type="text" value="ReadWrite"/>

Click 'Save' to retain the changes.

To remove Published access, right click the key date in question and then amend each linked user individually and set to 'None' and select 'Save'.


It is also possible to edit existing key dates to publish and set permissions.

Web enabling emails and creating messages for web enabled clients and associates

When sending an email to a recipient via Osprey, it is possible to also create a message for a Client or Associate.

Selecting this via the Portal enables the client and associate access to read the same sent email but via the Web Portal within the 'Messages' section.

Once any published users log into the portal, new messages will appear against relevant matters. Messages (Emails) can be viewed then marked as read.

Messages						
Send message to solicitor				Mark selected messages as read		
Author	Date	Subject	Message	<input type="checkbox"/>	Actions	
AdamB	17/12/2020 09:50	Email Regarding Case : Default Matter	Message	<input type="checkbox"/>		

Messages contain just the text only of the email and not the attachments. If the full email including attachment/s needs to be accessed via the Web Portal by either Associate or Client, it can be published from the matter history.

There is also an option to submit a new message to the Solicitor dealing with the matter.

Publishing emails

Any sent emails are automatically saved into the matter History. These can be published via the Web Portal in the exact same manner as published documents. Published emails are accessed within the same

area as Published documents when logging into the Web Portal.

To create a message that is accessible to both the Client and Associate via the web portal, select 'Send Email'. This option is available within the search area at the top of most Osprey menus and also from within matter history.

Send e-mail

Attach

Signature

Template:

(none)

High Importance:

Low Importance:

Create message for client:

Create message for associate:

If you wish to copy in an associate or a client, ensure the boxes are checked to the right hand side of the message then send as normal.
