Osprey Approach: Osprey Deal Room

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Sep 21st, 2022

The latest version is always online at
https://support.ospreyapproach.com/?p=30049

What is the Deal Room?

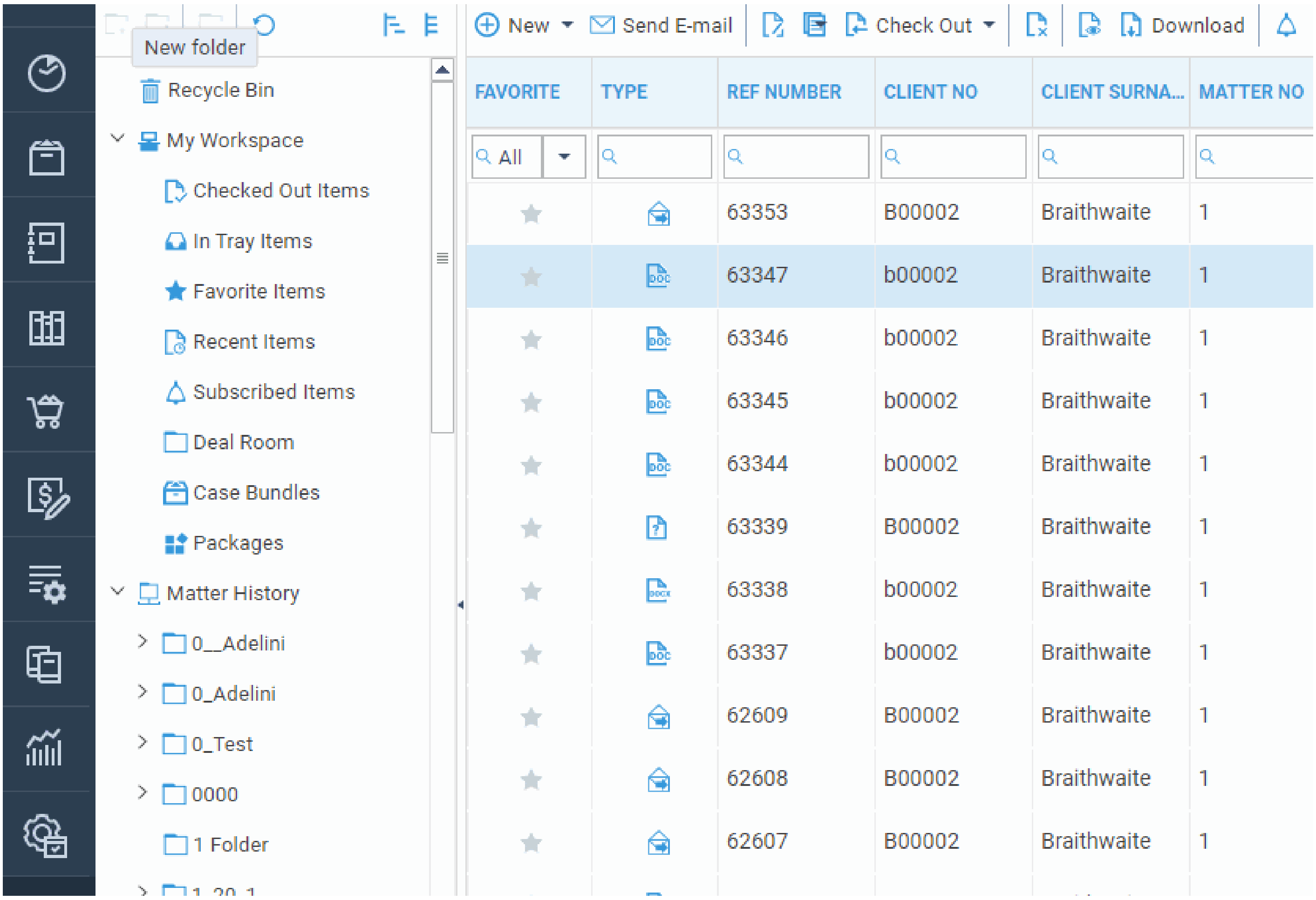
If you utilise the Osprey Web Portal facility there is a feature called ‘Deal Room’ available within a client’s matter history and within the Web Portal.

The Deal Room contains documents from matter history which are published to the web portal and used collaboratively by the published clients and their associates, an example might be for negotiating contracts. Not all documents from Osprey matter history are visible in the Web Portal Deal Room View, only those published from Deal Room.

Amending Access Templates for use with The Deal Room

To amend an access template navigate to:

Supervisor > System Setup > Users > Access Templates



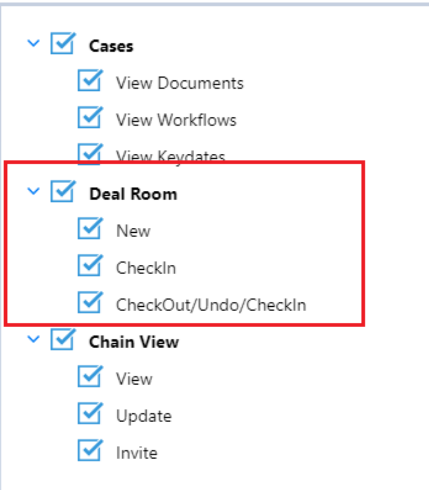
Select edit against the relevant access template

TEMPLATE ID	TEMPLATE NAME	DELETE	EDIT
1	Supervisor		
2	Guest		
5	Case Worker		

Then select the supervisor section and ensure the following are ticked then save the template.

- [x] Publish to Deal Room
- [x] Finalize Version

Access options within the deal room are also reliant on the relevant User Access Template settings, found in Supervisor - Portal Setup - Access Templates. Click on the user and choose edit. Here you can decide what actions are permissible by the portal users within the deal room



Publishing Documents to the Osprey Deal Room

In order to allow your Client or Associates access to documents in the deal room within the web portal, you must firstly publish any required documents from within the matter history in Osprey and grant relevant permission.

Right click any document you wish to publish and select the option of:

Publish to Deal Room

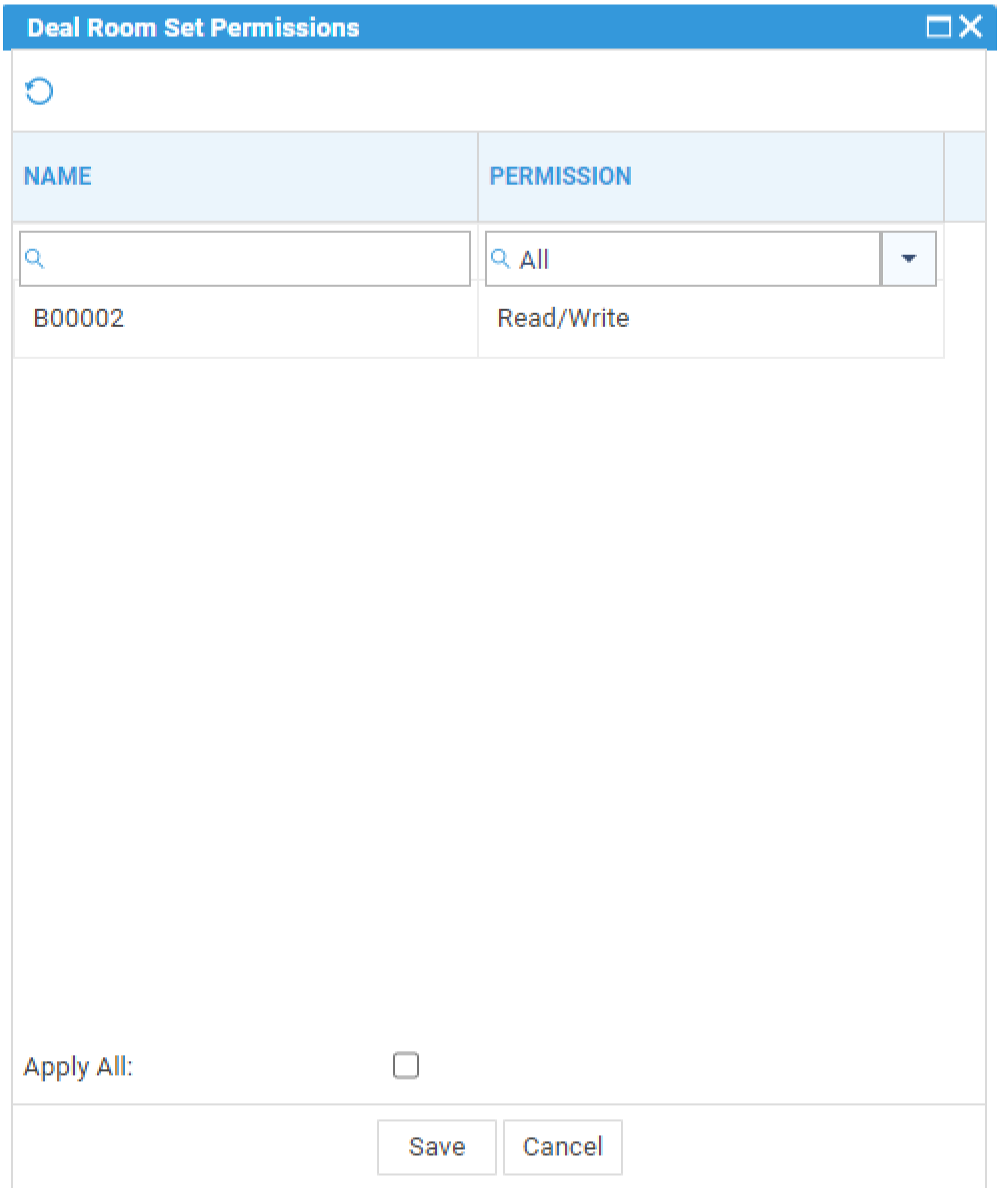
	63353	B00002	Braithwaite
	63347	b00002	Braithwaite
	63346	b00002	Braithwaite
	63345	b00002	Braithwaite
	63344	b00002	Braithwaite
	63339	B00002	Braithwaite
	63338	b00002	Braithwaite
	63337	b00002	Braithwaite
	62609	B00002	Braithwaite
	62608	B00002	Braithwaite
	62607	B00002	Braithwaite
	62360	B00002	Braithwaite
	62121	B00002	Braithwaite
	62120	B00002	Braithwaite
	62118	B00002	Braithwaite

At this point, a permissions screen will appear listing the client reference and all linked associates.

In order to allow your Client or Associate/s access to view/edit etc, you must set suitable permissions at this point.

If read/write has been selected for one, selecting 'All' will apply to all other linked users.

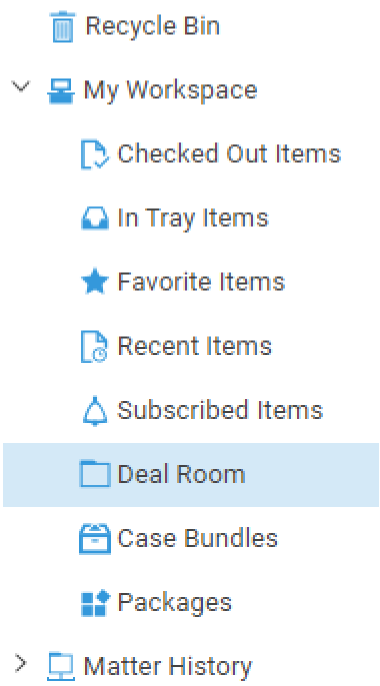
Select the 'Save' option to apply the permissions.



If permissions are not set at this point, it is possible to amend within the deal room.

Accessing Documents from within the Deal Room Folder.

Providing you have relevant access, you will now be able to view and make changes to any documents published to the Deal Room Folder, this folder is found in the 'My Workspace' area of a client's Matter History.



Documents from within the deal room have the following options available in addition to the standard check in/out/delete options etc:

Unpublish from Deal Room Will unlink the document from the deal room folder and unpublish from the deal room.

Finalise version Will disable the document from being edited from the Web Portal. Clients and Associates will still be able to view and download though.