Osprey Approach: Upgrading to the new era of Osprey

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The latest version is always online at
https://support.ospreyapproach.com/?p=70523

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Osprey™ Approach

Welcome to the new era of Osprey. This upgrade introduces a modern, more powerful platform designed to make your workflows faster, clearer, and easier to manage.

From refreshed dashboards and improved navigation to brand-new client and matter workspaces, this release provides the tools your firm needs to work smarter and deliver outstanding client service.

Before your upgrade

You've been assigned a go-live date for your upgrade. Leading up to that date, you'll receive a series of emails to guide you through the process and help you prepare for the transition.

Your upgrade will happen during the early hours to minimise disruption.

- After the upgrade, you'll be provided with a new URL to access the updated platform.
- All your existing data, including matters, clients, notes, and workflows, will remain intact.
- Links to release notes, training sessions, and how-to guides will be included in these emails so you can explore the new features at your own pace.

Please review that email carefully — it contains everything you need to prepare.

Once you are using Osprey 1.5 you will need to ensure you clear your browser cache to remove the possibility of conflicting information.

Using the new era of Osprey

Explore the latest version how-to guides to understand how to access, set up, and use the new features in Osprey.

- Accessing your Osprey sites >
- First login - forgotten password >
- Moving around Osprey >
- Osprey Dashboard >
- Conflict of Interest Search
- Creating a Client and Matter
- Client & Matter Workspaces
- Time Tracker
- Produce a Document
- Custom Data Pages
- Client & Matter Notes
- Client & Matter Tables
- Adding and Managing Key Dates

Overview & training Sessions

Join one of our live sessions to see the new features in action:

- **Monday overview session**
- **Thursday overview session**

These sessions cover what's new, what's changed, and how to get the most from Osprey 1.5.

Latest release notes & how-to guides

- **View the latest Q1 release notes**
- **View Q3 2024 release notes**
- **Explore the New Era guide**

Our how-to articles walk you through key changes step-by-step, from navigation updates to using the new client and matter workspaces.

Key updates in the new era

Here are some of the most important enhancements you'll notice after the upgrade:

- **Modern dashboards & refreshed UI** – Clearer overview of tasks, matters, and KPIs.
- **Streamlined navigation** – Core tools like case management, accounts, reporting, and compliance are easier to access.
- **New time tracking sidebar** – Record time faster and more accurately without interrupting workflows.
- **Improved client & matter setup** – Smoother creation flows with enhanced conflict-of-interest checks.
- **Enhanced integrations** – More connections with market-leading tools to streamline your practice.

And here are some **brand-new features and integrations** introduced in Osprey 1.5:

- **Dedicated Client & Matter Workspaces** – All key information in one place for faster, more accurate work.
- **Client & matter notes** – Capture, track, and search updates directly in the workspace.
- **Client & matter tables** – Sortable, filterable, exportable lists with batch actions.
- **Enhanced custom data pages** – Greater flexibility to capture and display the data you need.
- **Perfect Portal integration** – Improve client communications, onboarding, and quote management.
- **Katchr dashboards** – Advanced reporting and firm-wide performance insights.
- **Minerva integration** – A new connection with Minerva's client onboarding platform streamlines new client intake.

Need help?

Our support team and CSMs are here to help at every step. If you have any questions before, during, or after the upgrade, please contact:

- **Support:** support@ospreyapproach.com
- **Phone:** 0330 060 4940