

Osprey Approach: Using the COLP/COFA Functionality

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The latest version is always online at
<https://support.ospreyapproach.com/?p=66053>

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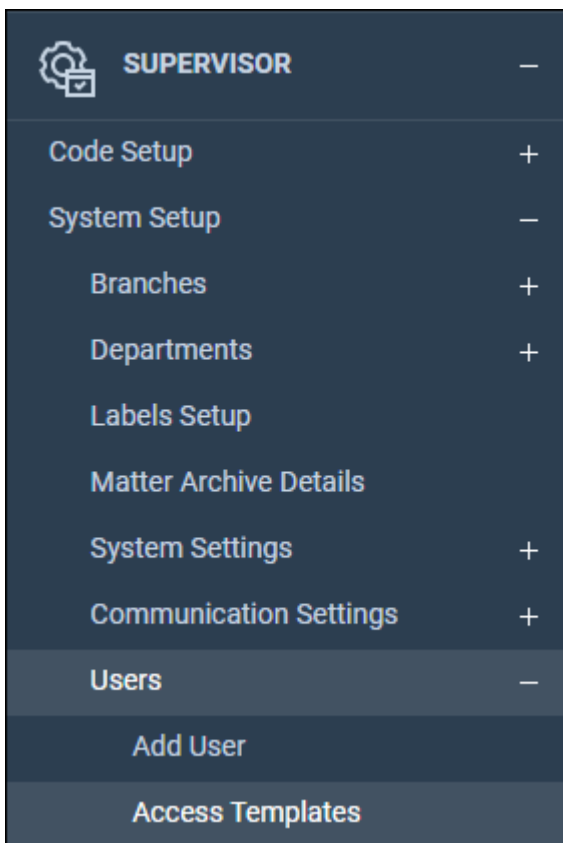
This guide will go through utilising the COLP and COFA functionality in Osprey

In addition to the COLP areas covered by worktypes, the following areas are available within the Case Management menu:

- Oaths
- Storage
- Fee Sharing & Referrals
- Introductions to Third Parties
- Equality and Diversity Breaches

Change the Access Template


To obtain full access to these areas, navigate to your 'Supervisor' tab and select 'System Setup'. Go to 'Users' and then select 'Access Templates'.



Within the 'Supervisor' area of the Access Template, ensure that the below check boxes for COLP/COFA and 'List Management' are ticked.

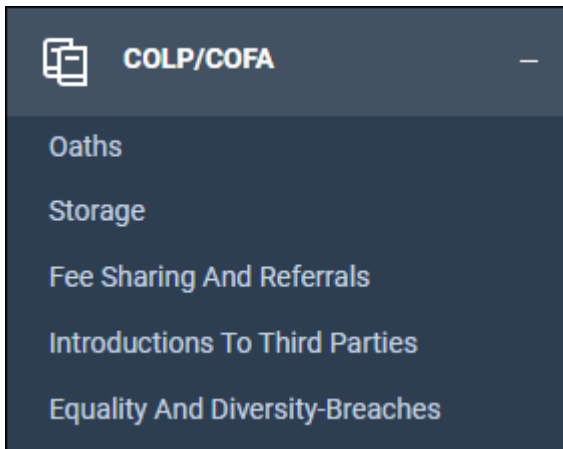
- ▼ Case Management Setup
 - ▶ KPI Details
 - KPI Details
 - ▶ Debt Recovery
 - ▶ Expert Types
 - ▶ Key Date Types
 - ▶ Formulae
 - ▶ Standard Documents
 - ▶ Workflows
 - ▶ Tasks
 - ▶ Dossier Pages
 - ▶ Dossier Fields
 - ▶ Workflow Sections
 - Setup Conveyancer Portal
 - Import XML File
 - Adjust Workflow Dates
 - RTAPI Claim Fields Mapping
 - ▶ E-mail Templates
 - ▶ Matter History
 - ▶ Smart Actions
 - ▼ COLP/COFA
 - List Management

Now select the 'COLP/COFA' option on the main list of template areas and select the 'Allow Area Access' link at the top. Ensure that the relevant areas of COLP/COFA that you wish to use are ticked, then click 'Save'.

- ▼  **COLP/COFA**
 - Oaths
 - Storage
 - Fee Sharing And Referrals
 - Introductions To Third Parties
 - Equality And Diversity-Breaches

Making use of COLP/COFA

Once access has been enabled, relevant users will be able to access COLP List Management via an independent entry beneath Smart Actions:



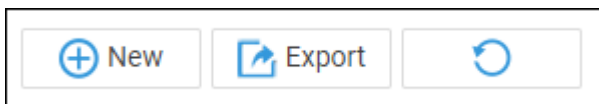
The screen shows all current lists, with one entry for each list item. Data available is Area Type, List Type, Value, Created Date, Created by, Last Modified Date and Last Modified By.

ADMINISTRATOR NAME	ADMINISTRATOR AUTHORISED	ADMINISTRATOR STATUS	COMMENTS	DATE	PROPERLY AUTHORISED	TYPE
crisina	Yes	Solicitor	Case Research	06/09/2018	Yes	Affirmation
Supervisor	No	Licensed Conveyancer	OK	26/07/2018	No	Oath

Columns can be dragged to resize, can be sorted into ascending or descending order and can be hidden or shown as required.

New items can be added to a list, and lists can be edited, cloned and deleted. List Management is available for all COLP lists, except where the content is pre-defined.

To add a new list, click on 'New' at the top of the screen.



Now select 'Area Type', then choose a 'List Type'. Please note that there is no option for Fee Sharing and Referrals as all the lists here are pre-defined.

New List Management

Area Type:

List Type:

Value:

OK Cancel

In terms of list type, you have several options:

Oaths

New List Management

Area Type: Oaths

List Type:

Value:

Oaths Administrator Status

Oaths Type

OK Cancel

Storage

New List Management ✕

Area Type: ▼

List Type: ▼

Value:

- Storage Type
- Storage Location
- Storage Reference

Introduction to Third Parties

New List Management ✕

Area Type: ▼

List Type: ▼

Value:

- Introductions To Third Parties Purpose

Equality and Diversity Breaches

New List Management [X]

Area Type: Equality And Diversity Br [v]

List Type: [v]

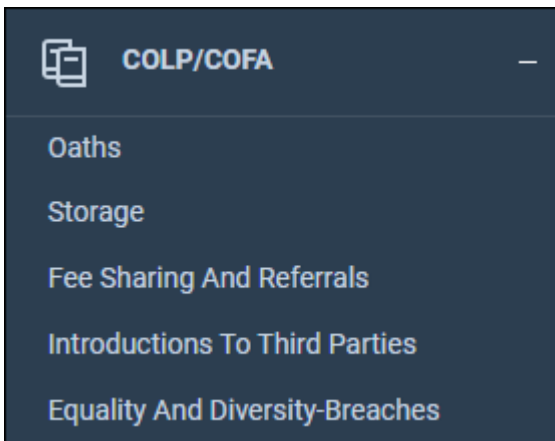
Value:

- Equality And Diversity Breaches Complaina
- Equality And Diversity Breaches Status Part
- Equality And Diversity Breaches Status Part

OK Cancel

Then type in the text required into the Value field, and Save. Repeat as required.

In terms of user level access to COLP/COFA, the tab is available on the left-hand menu.



Please note that if the tab does not appear, it is likely that your access template does not allow you to view this area of Osprey. Please contact your system supervisor to arrange access.

The COLP/COFA functionality offers a number of search and filter options which may be new to users. The details below apply to all COLP areas.

Click at the far right of any search field to reveal Filter Options. Each Search can be set up with individual filter options, if required:

Filter on	▶
Filter type	▶
Clear filter	
Clear all filters	

Select 'Filter On' will allow you to select the option for 'Keyup', which means that the filter can be set to operate as soon as characters are typed into the search box, or 'Enter Key', which will only operate upon clicking 'Enter' on your keyboard.

Filter on	▶	Enter key
Filter type	▶	✓ Keyup
Clear filter		
Clear all filters		

The 'Filter Type' area allows you to select an 'Exact Filter' to match the typed text exactly, or the 'Starts With' filter in which you can add the start of your text, then search.

'Expression Filter' looks for patterns in text data – the use of * means “match zero or more of the following characters” – eg *thd** would return results for “Third Party Introductions” as well as “Oaths Administrator”.

Filter on	▶	
Filter type	▶	Exact filter
Clear filter		✓ Starts with filter
Clear all filters		Expression filter

Oaths

Clicking on the 'Oaths' heading will reveal all records on the database. Clicking on a particular record will bring up the details for this particular record on the right-hand side of the screen.

ADMINISTRATOR NAME	ADMINISTRATOR AUTHO...	ADMINISTRATOR STATUS	COMMENTS	DATE	PROPERLY AUTHORIZED	TYPE
crisrina	Yes	Solicitor	Case Research	06/09/2018	Yes	Affirmation
Supervisor	No	Licensed Conveyancer	OK	26/07/2018	No	Oath

Administrator Name	crisrina
Administrator Authorised	Yes
Administrator Status	Solicitor
Comments	Case Research
Date	06/09/2018
Properly Authorized	Yes
Type	Affirmation

Alternatively, right-click on one of the available records and click 'View' to bring up the details panel.

To add a new record, select the 'New' icon on the top toolbar and enter the data as required. Then select 'Save' once complete.

New - Oath

Administrator Name*: ?

Administrator Authorised: ?

Administrator Status*: Please select ▼ ?

Comments*: ?

Date*: 📅

Properly Authorised:

Type*: Please select ▼

Save Cancel

Within the 'Record Details' side panel, select the 'Attachments' tab to view any available documents attached. These can be viewed, downloaded, deleted and added. Right-click an attachment to view options for deleting and downloading.

Record Details | **Attachments** | Client/Matter

⊕ New | 🗑️ | ↻

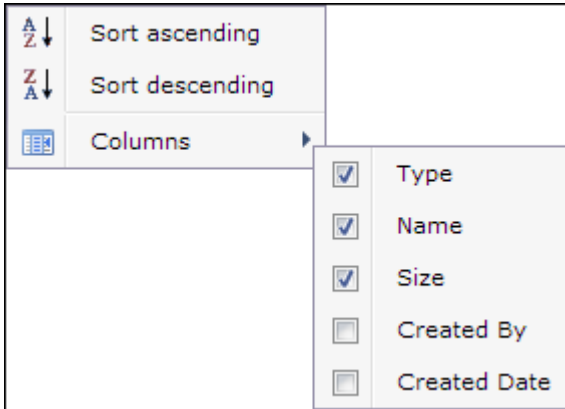
TYPE	NAME	SIZE
🔍	🔍	🔍
JPG	C:\User...top\buchare...	72.10 Kb
PDF	C:\User...uments\all fil...	621.88 ...

🗑️ Delete

📄 Download

To add an attachment click on the 'New' icon and browse to the required document. Click 'Open' and the document will be saved to the record. Repeat for as many documents as are required.

The following column options are available within the Attachment details area.

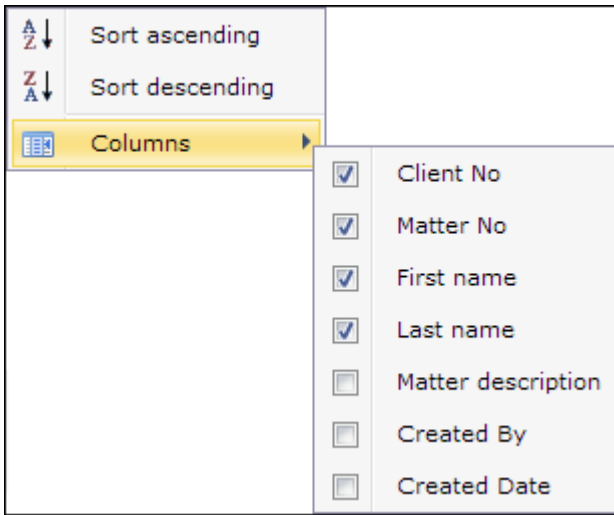


You may also assign particular records to clients or matters if required. Left click on the relevant record and then select the 'Client/Matter' tab. Click 'New' and you may now either type in the details required or select the drop-down arrow for further search options.

Records can be assigned at Client level or at Matter level. They can be assigned to more than one Client and/or Matter.

Record Details	Attachments	Client/Matter
+ New [Refresh] [Refresh]		
CLIENT NO	MATTER NO	
<input type="text"/>	<input type="text"/>	
B00094	4	
B00094	3	
S00002	1	
D00001	1	

Within the 'Client/Matter' tab, you have the following column options.



Individual records can be printed by selecting the 'Print' option within the 'Record Details' area.



Storage

Clicking on the 'Storage' heading will reveal all records on the database. Clicking on a record will bring up the details for this particular record on the right-hand side of the screen.

New Clone Export											Record Details	Attachments	Client/Matter
TYPE	DETAILS	LOCATION	REFERENCE	DATE DEPOSIT	DEPOSITED BY	DATE RETRIEV...	RETRIEVED BY	REASON RETRI...	RETURNED TO	DATE RETURN	Clone Refresh Refresh		
Will	Will Test W00...	Wills Test	DWON123	30/05/2019	Ethan Test						Type	Will	
Will	Will Test	Cellar	11233	30/05/2019	Ethan	12/09/2019					Details	Will Test W00016	
Will	Mr Matthews...	Cellar	1234856	17/04/2019	craig						Location	Wills Test	
Chelsea Test	Chelsea Test	Chelsea Test	Chelsea Test	10/04/2019	Chelsea	10/04/2019	Chelsea	Chelsea	Chelsea	10/04/2019	Reference	DWON123	
Will & LPA	Chelsea Test	Cellar	12345	02/04/2019	Chelsea						Date Deposit	30/05/2019	
Will	New Will	Basement	11233	18/09/2018	neil						Deposited By	Ethan Test	
											Date Retrieval		
											Retrieved By		
											Reason Retrieval		
											Returned To		
											Date Return		
											Comments		

Alternatively, right-click on one of the available records and click 'View' to bring up the details panel.

To add a new record, select the 'New' icon on the top toolbar and enter the data as required. Then select 'Save' once complete.

New - Storage
□ ×

Type*: ?

Details*: ?

Location*: ?

Reference*: ?

Date Deposit*: ?

Deposited By*: ?

Date Retrieval: ?

Retrieved By: ?

Reason Retrieval: ?

Returned To: ?

Date Return: ?

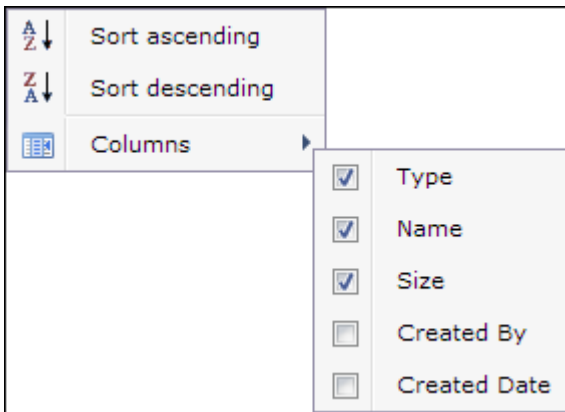
Comments: ?

Within the 'Record Details' side panel, select the 'Attachments' tab to view any available documents attached. These can be viewed, downloaded, deleted and added. Right-click an attachment to view options for deleting and downloading.

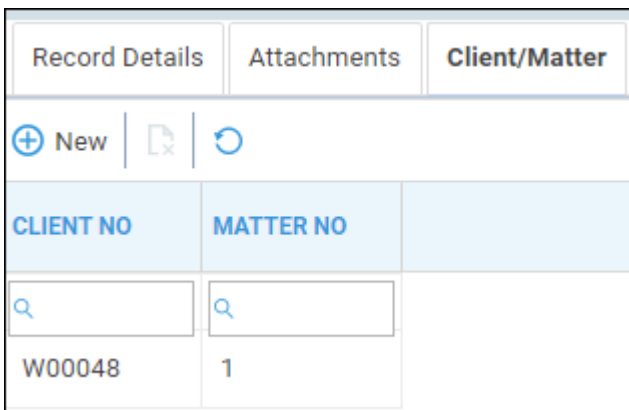
Record Details	Attachments	Client/Matter
+ New <input type="button" value="New Document"/> <input type="button" value="Refresh"/>		
TYPE	NAME	SIZE
<input type="text" value="🔍"/>	<input type="text" value="🔍"/>	<input type="text" value="🔍"/>
	C:\Users\Ethan\Desktop\Will Test For ...	11.61 Kb

To add an attachment click on the 'New' icon and browse to the required document. Click 'Open' and the document will be saved to the record. Repeat for as many documents as are required.

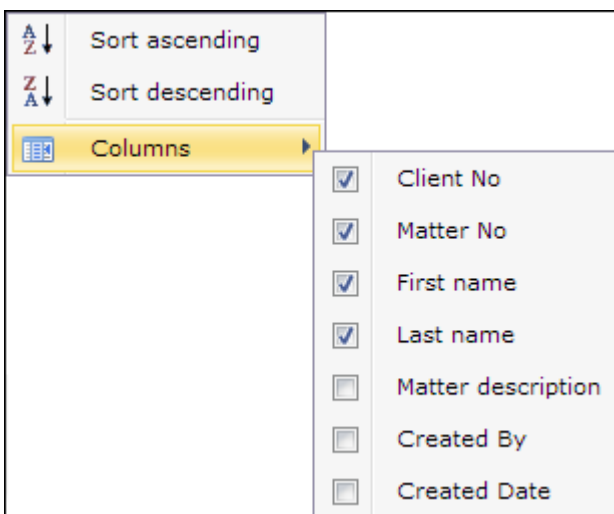
The following column options are available within the Attachment details area.



You may also assign particular records to clients or matters if required. Left click on the relevant record and then select the 'Client/Matter' tab. Click 'New' and you may now either type in the details required or select the drop-down arrow for further search options. Records can be assigned at Client level or at Matter level. They can be assigned to more than one Client and/or Matter.



Within the 'Client/Matter' tab, you have the following column options.



Individual records can be printed by selecting the 'Print' option within the 'Record Details' area.



Fee Sharing and Referrals

After selecting the 'New' button under 'Fee Sharing & Referrals', complete all relevant data in respect of the Fee Sharing Arrangement by checking the relevant boxes.

The screenshot shows a window titled "New - Fee Sharing And Referral" with a list of 13 items, each with a checkbox and a question mark icon. At the bottom, there are "Save" and "Cancel" buttons.

Field	Option
Referred?:	<input checked="" type="checkbox"/> ?
Fees Shared?:	<input checked="" type="checkbox"/> ?
Referrer Interests?:	<input checked="" type="checkbox"/> ?
Fee Sharing Arrangement?:	<input checked="" type="checkbox"/> ?
Written Agreement?:	<input checked="" type="checkbox"/> ?
Information to Client:	<input checked="" type="checkbox"/> ?
Best Interests?:	<input checked="" type="checkbox"/> ?
Reputable Parties?:	<input checked="" type="checkbox"/> ?
Criminal Proceedings?:	<input checked="" type="checkbox"/> ?
Public Funding?:	<input checked="" type="checkbox"/> ?
Breach?:	<input checked="" type="checkbox"/> ?
Monitoring?:	<input checked="" type="checkbox"/> ?
Fair Treatment?:	<input checked="" type="checkbox"/> ?

Left-click the check box one or more times to cycle through the options.

- A tick in the box means 'Yes'.
- A solid square in the box means 'Not Applicable'
- An empty box means 'No'

When the report is run, 'Yes' results show as 'True'. 'No' results show as 'False' and 'Not Applicable' results show as blank.

Within the 'Record Details' side panel, select the 'Attachments' tab to view any available documents attached. These can be viewed, downloaded, deleted and added. Right-click an attachment to view options for deleting and downloading.

Record Details		Attachments	Client/Matter
+ New			
TYPE	NAME	SIZE	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
	Osprey Approach Standard Documents...	546.00 ...	

To add an attachment click on the 'New' icon and browse to the required document. Click 'Open' and the document will be saved to the record. Repeat for as many documents as are required.

The following column options are available within the Attachment details area.

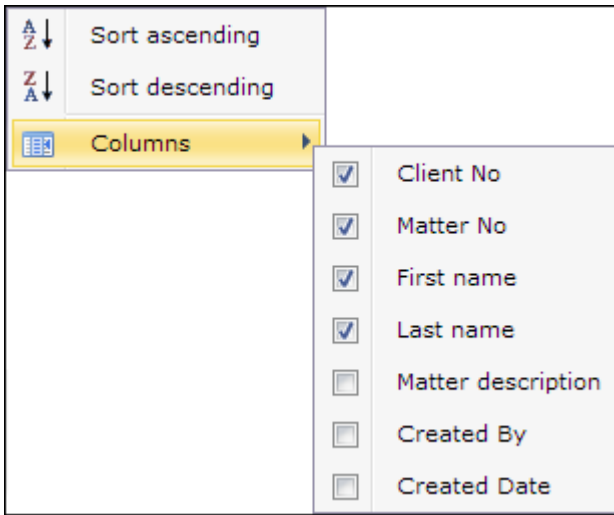
	Sort ascending	
	Sort descending	
	Columns	<input checked="" type="checkbox"/> Type <input checked="" type="checkbox"/> Name <input checked="" type="checkbox"/> Size <input type="checkbox"/> Created By <input type="checkbox"/> Created Date

You may also assign particular records to clients or matters if required. Left click on the relevant record and then select the 'Client/Matter' tab. Click 'New' and you may now either type in the details required or select the drop-down arrow for further search options.

Records can be assigned at Client level or at Matter level. They can be assigned to more than one Client and/or Matter.

Record Details		Attachments	Client/Matter
+ New			
CLIENT NO	MATTER NO		
<input type="text"/>	<input type="text"/>		
D00001	3		

Within the 'Client/Matter' tab, you have the following column options.



Individual records can be printed by selecting the 'Print' option within the 'Record Details' area.



Introductions to Third Parties

After selecting the 'New' button under 'Introductions to Third Parties', complete all relevant data in respect of the introduction by checking the relevant boxes and filling in any fields.

New - Introduction To Third Party □ ×

Recommendation?: ?

TP Name*: ?

TP Address: ?

TP Business: ?

Purpose*: ▼ ?

Best Interests?: ?

Suitable?: ?

Limitations?: ?

Client Informed?: ?

Details: ?

Independence Compromised?: ?

Interest In Referral?: ?

Client Informed?: ?

Investment Advice?: ?

Independent Intermediary?: ?

Appointed Representative?: ?

Left-click the check box one or more times to cycle through the options.

- A tick in the box means 'Yes'.
- A solid square in the box means 'Not Applicable'
- An empty box means 'No'

When the report is run, 'Yes' results show as 'True'. 'No' results show as 'False' and 'Not Applicable' results show as blank.

Within the 'Record Details' side panel, select the 'Attachments' tab to view any available documents attached. These can be viewed, downloaded, deleted and added. Right-click an attachment to view options for deleting and downloading.

Record Details		Attachments	Client/Matter
+ New			
TYPE	NAME	SIZE	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
	Doc1.docx	100.92 ...	

To add an attachment click on the 'New' icon and browse to the required document. Click 'Open' and the document will be saved to the record. Repeat for as many documents as are required.

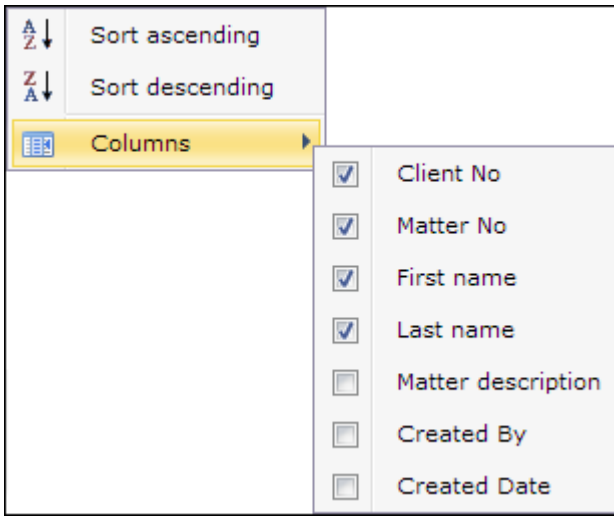
The following column options are available within the Attachment details area.

	Sort ascending	
	Sort descending	
	Columns	
	<input checked="" type="checkbox"/>	Type
	<input checked="" type="checkbox"/>	Name
	<input checked="" type="checkbox"/>	Size
	<input type="checkbox"/>	Created By
	<input type="checkbox"/>	Created Date

You may also assign particular records to clients or matters if required. Left click on the relevant record and then select the 'Client/Matter' tab. Click 'New' and you may now either type in the details required or select the drop-down arrow for further search options. Records can be assigned at Client level or at Matter level. They can be assigned to more than one Client and/or Matter.

Record Details		Attachments	Client/Matter
+ New			
CLIENT NO	MATTER NO		
<input type="text"/>	<input type="text"/>		
D00001	3		

Within the 'Client/Matter' tab, you have the following column options.



Individual records can be printed by selecting the 'Print' option within the 'Record Details' area.



Equality and Diversity Breaches

After selecting the 'New' button under 'Equality & Diversity Breaches', complete all relevant data in respect of the introduction by checking the relevant boxes and filling in any fields.

New - Equality And Diversity-Breach

Complainant Name*: ?

Complainant Status*: Please select ?

Cited Party (1)*: ?

Status Party (1)*: Please select ?

Cited Party (2): ?

Status Party (2): Please select ?

Breach Details*: ?

Reported By*: ?

Reported To*: ?

Date Reported*: ?

Save Cancel

Left-click the check box one or more times to cycle through the options.

- A tick in the box means 'Yes'.
- A solid square in the box means 'Not Applicable'
- An empty box means 'No'

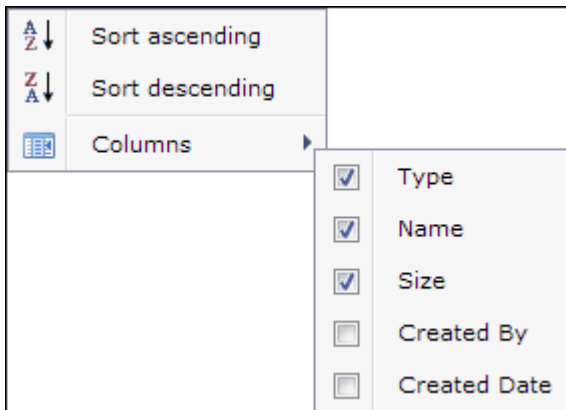
When the report is run, 'Yes' results show as 'True'. 'No' results show as 'False' and 'Not Applicable' results show as blank.

Within the 'Record Details' side panel, select the 'Attachments' tab to view any available documents attached. These can be viewed, downloaded, deleted and added. Right-click an attachment to view options for deleting and downloading.

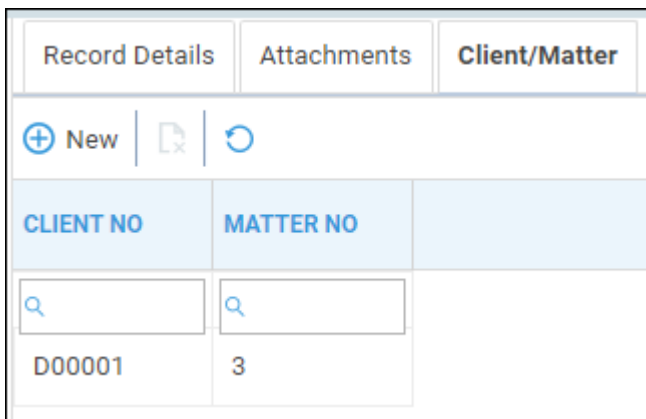
Record Details		Attachments	Client/Matter
(+) New			
TYPE	NAME	SIZE	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
	Osprey Approach Standard Documents...	546.00 ...	

To add an attachment click on the 'New' icon and browse to the required document. Click 'Open' and the document will be saved to the record. Repeat for as many documents as are required.

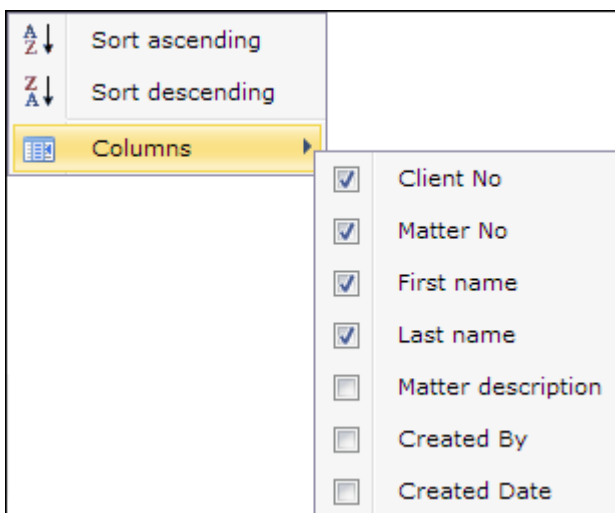
The following column options are available within the Attachment details area.



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