

Osprey Approach: Using the Dossier

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The latest version is always online at
<https://support.ospreyapproach.com/?p=53154>

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This guide will show you how to use dossiers to capture information in Osprey, which can then populate documents and email templates

Dossier fields allow you to capture information you require to be able to progress and complete your client's matters, when can then be reused to populate documents and email templates, perform searches, or even dictate which actions should run from within a workflow.

As each firm will work differently, your system supervisor may configure Osprey to use one or more of the below methods.

Client or matter level

Dossiers may be set to be at a client level or a matter level.

Client level will relate to the client themselves and can capture information that would not change between areas of law.

Examples of Client Level Dossier fields: *Date of Birth, National Insurance Number, Passport Number, Company Registration Number.*

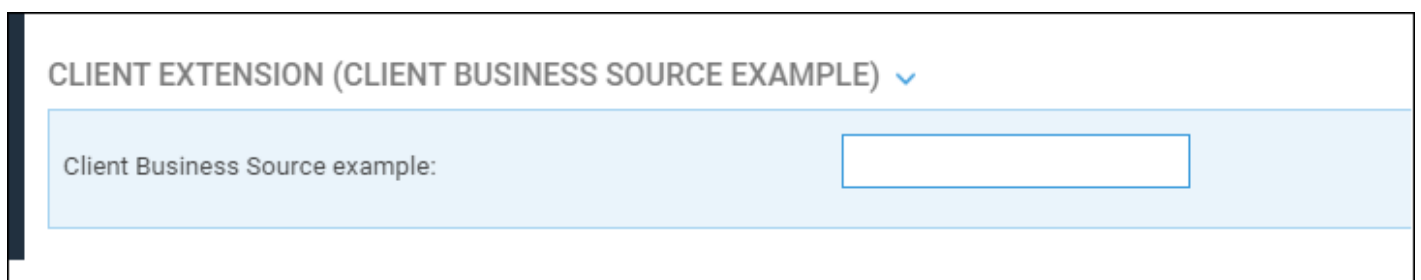
Matter Level will relate to the work being carried out, that would only be applicable for the matter.

Examples of Matter Level Dossier: *Property Sale Price, Name of Police Officer in attendance, date of incident*

Extensions

Extensions allow specific dossier fields to be captured whilst adding the client into Osprey.

Client extensions will appear at the bottom of the client screen and can be set up to display if the client is an individual, a company, or either.



The screenshot shows a user interface element for a client extension. At the top, there is a header 'CLIENT EXTENSION (CLIENT BUSINESS SOURCE EXAMPLE) v'. Below this, there is a light blue horizontal bar containing the text 'Client Business Source example:' followed by a white rectangular input field with a blue border.

Matter extensions will be linked to a specific work type but work in a similar way.

When adding a matter, a matter extension will appear at the bottom of the screen. This section may contain fields that are linked to various dossier pages.

MATTER EXTENSION (DAN MATTER EXTENSION) ▾

Client 1 account name:	<input type="text" value="Client 1 Account Name 20/04"/>
Client 1 account number:	<input type="text"/>
Client 2 account name:	<input type="text"/>
Client 2 account number:	<input type="text"/>
Client 2 bank name:	<input type="text"/>
Client joint account name:	<input type="text"/>
Client joint account number:	<input type="text"/>
Client joint bank name:	<input type="text"/>

Capture this information where possible and click Save.

If you require to amend any of these fields, you can edit the client details page, or matter details page respectively.

Questionnaires

Questionnaires provide another format for you to be able to capture information and can even be sent out via the client web portal, to be completed by the client or associate directly.

These are produced through workflows, which can be accessed from Case Management > Workflows.

Dossier pages

Any data captured via the Questionnaire or extensions are saved into dossier fields. Dossier pages hold the fields and can contain up to 20 dossier fields per dossier page.

To access matter level dossier pages, navigate to Case Management > Dossier.

If you need to access the client dossier pages, navigate to Case Management > Dossier and select [Go to Client Level]

Key Dates: Date: Description: More Key Dates

CRM Search | Send e-mail | Client Dossier | SMS

Notes

Document Production

Contacts & Organisations

Workflows

Debt Recovery

Contract Work Forms

RTAPI Claims

Run IHT Forms

Searchflow

Lexis Forms

SDLT Forms

Matter History New

Search...

ION	SELECT
	✓
Other Details RC	✓
ortion RC	✓

DOSSIER PAGE ▾

Dossier pages available for this matter: [\[Go to client level\]](#)

Export

Left click on the dossier page you wish to open. All linked dossier fields will appear. You will be able to make any adjustments and click Save.

Save Cancel

Leasehold/Freehold?:	Freehold ▾	Registered/Unregistered?:	Please Select ▾
Vacant possession or subject to lease/tenancy?:	Please Select ▾	Title Number:	<input type="text"/>
Root of Title:	<input type="text"/>	Matter Type:	Sale ▾
Property Price:	0.00	Town:	Fakington
Street Number:	123 Fake Street	Street Name:	<input type="text"/>
Postcode:	AB12 3CD	County:	<input type="text"/>
Building name:	<input type="text"/>	Amount of Vendors:	1 ▾
Amount of Purchasers:	1 ▾	Freehold with Ground Rent/Service Charge?:	Please Select ▾
Allowance:	0.00		