Osprey Approach: Using the Dossier (App)

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The latest version is always online at
https://support.ospreyapproach.com/?p=44865

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This guide will show you how to use dossiers to capture information in our case management app, 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*
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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.

Client Extension

Communication Method

Please Select

ID Provided?

Please Select

ID 1

Please Select

ID 2

Please Select

Client Gender

Please Select

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

BK Purchase Address

Estate Agent

(None selected)

Estate Agent Ref

Other Party 1 Full Name

Neil Braithwaite

Other Party 1 address

Other Party 2 Full Name

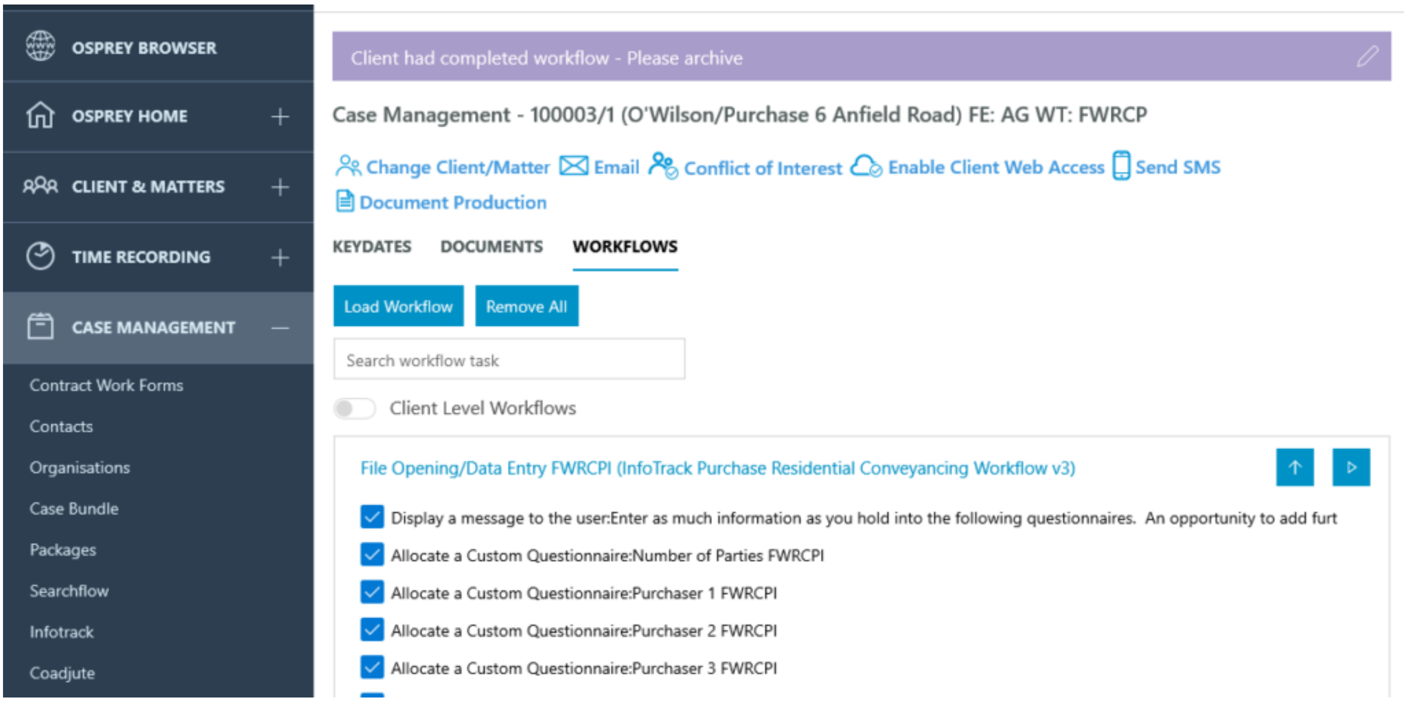
Capture this information where possible and click Save.

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, and selecting the Workflows tab.



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 Client/Matter > Dossier Matter Level/
If you need to access the client dossier pages, navigate to Client/Matter > Client Details > Dossier Client Level

Dossier Pages - 100003/1 (O'Wilson/Purchase 6 Anfield Road) FE: AG WT: FWRCP

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

Page Id	Description
RC_OCCUPIER	Occupier Details RC
RC_ORGANISATION	Organisations RC
RC_PROPDETAIL	Property Details RC
RC_PURCH1	Purchaser 1 RC
RC_PURCH2	Purchaser 2 RC
RC_PURCH3	Purchaser 3 RC
RC_PURCH4	Purchaser 4 RC

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.

Edit Dossier Page - Agent 1 RC - 100003/1 (O'Wilson/Purchase 6 Anfield Road) FE: AG WT: FWRCP

Save

Solicitor Title	Mr	Solicitor First Name	John
Solicitor Second Name		Solicitor Surname	Jones
Solicitor Telephone	01234 567890	Solicitor Email	john@jones.com
Solicitor Firm Name	Jones and Jones	Solicitor DX	DX 12345
Solicitor Building Name	The Oaks	Solicitor Street Number	
Solicitor Street Name	High street	Solicitor Town	Townington
Solicitor County	Countryshire	Solicitor Postcode	AB1 2CD
Solicitor DX 2			