

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*

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.

The screenshot displays the OSPREY BROWSER interface. On the left is a dark sidebar with navigation options: OSPREY BROWSER, OSPREY HOME, CLIENT & MATTERS, TIME RECORDING, CASE MANAGEMENT, Contract Work Forms, Contacts, Organisations, Case Bundle, Packages, Searchflow, Infotrack, and Coadjute. The main content area shows a purple notification bar: "Client had completed workflow - Please archive". Below this is the case title: "Case Management - 100003/1 (O'Wilson/Purchase 6 Anfield Road) FE: AG WT: FWRCPI". Action buttons include "Change Client/Matter", "Email", "Conflict of Interest", "Enable Client Web Access", and "Send SMS". A "Document Production" link is also present. The "KEYDATES", "DOCUMENTS", and "WORKFLOWS" tabs are visible, with "WORKFLOWS" being the active tab. Under "WORKFLOWS", there are "Load Workflow" and "Remove All" buttons, a search box for "Search workflow task", and a toggle for "Client Level Workflows". A workflow card titled "File Opening/Data Entry FWRCPI (InfoTrack Purchase Residential Conveyancing Workflow v3)" is shown with a list of tasks, all of which are checked: "Display a message to the user: Enter as much information as you hold into the following questionnaires. An opportunity to add fur...", "Allocate a Custom Questionnaire: Number of Parties FWRCPI", "Allocate a Custom Questionnaire: Purchaser 1 FWRCPI", "Allocate a Custom Questionnaire: Purchaser 2 FWRCPI", and "Allocate a Custom Questionnaire: Purchaser 3 FWRCPI".

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

- [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_PROPDDETAIL	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](#)

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John

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Solicitor Surname

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