



# Osprey Approach: What are Shadow Sessions?

This help guide was last updated on  
Nov 2nd, 2023

The latest version is always online at  
<https://support.ospreyapproach.com/?p=53335>



The purpose of the Shadow Sessions is to explore how your current day to day tasks are performed.

The Shadow Sessions are performed with Microsoft Teams. Please ensure that you have access to Microsoft Teams, and you have the ability to share your display prior to these sessions.

The information we look to gather within these sessions will help define your use of Osprey and tailor your user training. We will also discover any areas where there could be an improvement in your procedures.

The sessions should take between 30 – 60 minutes.

We will need, from each department, someone who can show us the tasks listed below. We will also need a separate session with your accounts department covering their typical tasks.

## What is covered in a shadow session

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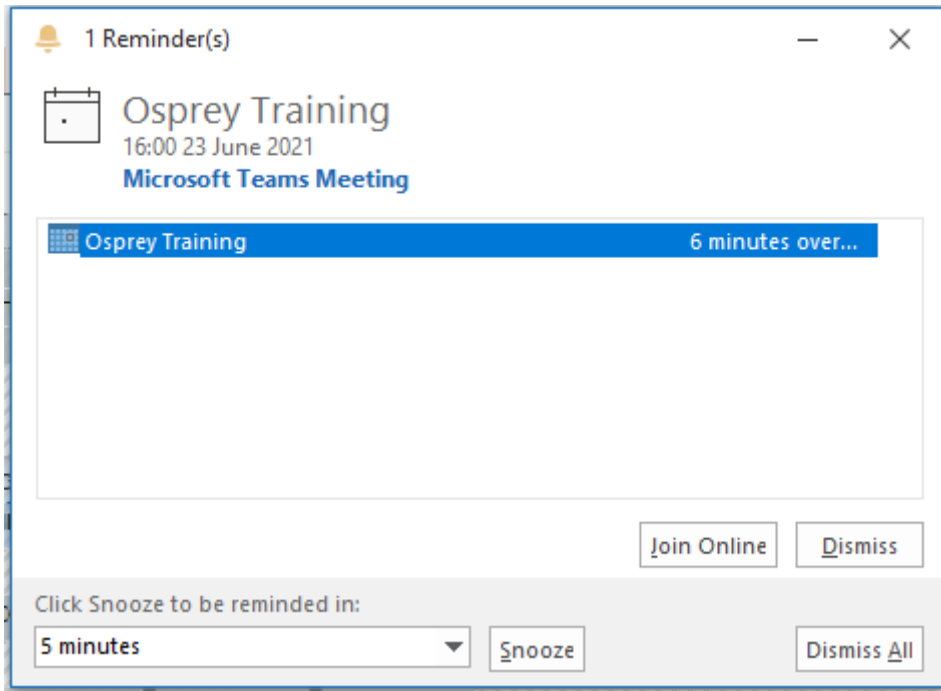
- Adding a new client and matter, then adding a matter to an existing client.
- Running a conflict check
- If matter locking is used
- Preparing client care paperwork
- Preparing general correspondence and any methods of data capture in your current system
- How your document storage is structured
- Emailing  
*What methods of sending correspondence do you use? Outlook? Built-in Email clients? Office 365?*
- How forms are created
- Adding a contact and organisation and linking them to the matter/document templates
- Navigating between screens  
*How do users view WIP, client information, client ledger etc*
- Time recording process.
- Posting to ledgers/requisitions process
- Current billing process
- Archiving a file
- Compliance  
*Taking into consideration risk management, client ID, file reviews etc.*
- Reporting requirements, both high level and fee earner level
- Work environments  
*Are users working from home, in the office, hybrid? What devices do they use?*

## How to join a shadow session

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Shadow sessions are conducted via Microsoft Teams. You will need an audio device connected to your PC along with a microphone to commence the session.

Your session will be added as a calendar appointment, when it's time you may get a reminder



click Join Online

Alternatively, open your calendar appointment

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## Microsoft Teams meeting

### Join on your computer or mobile app

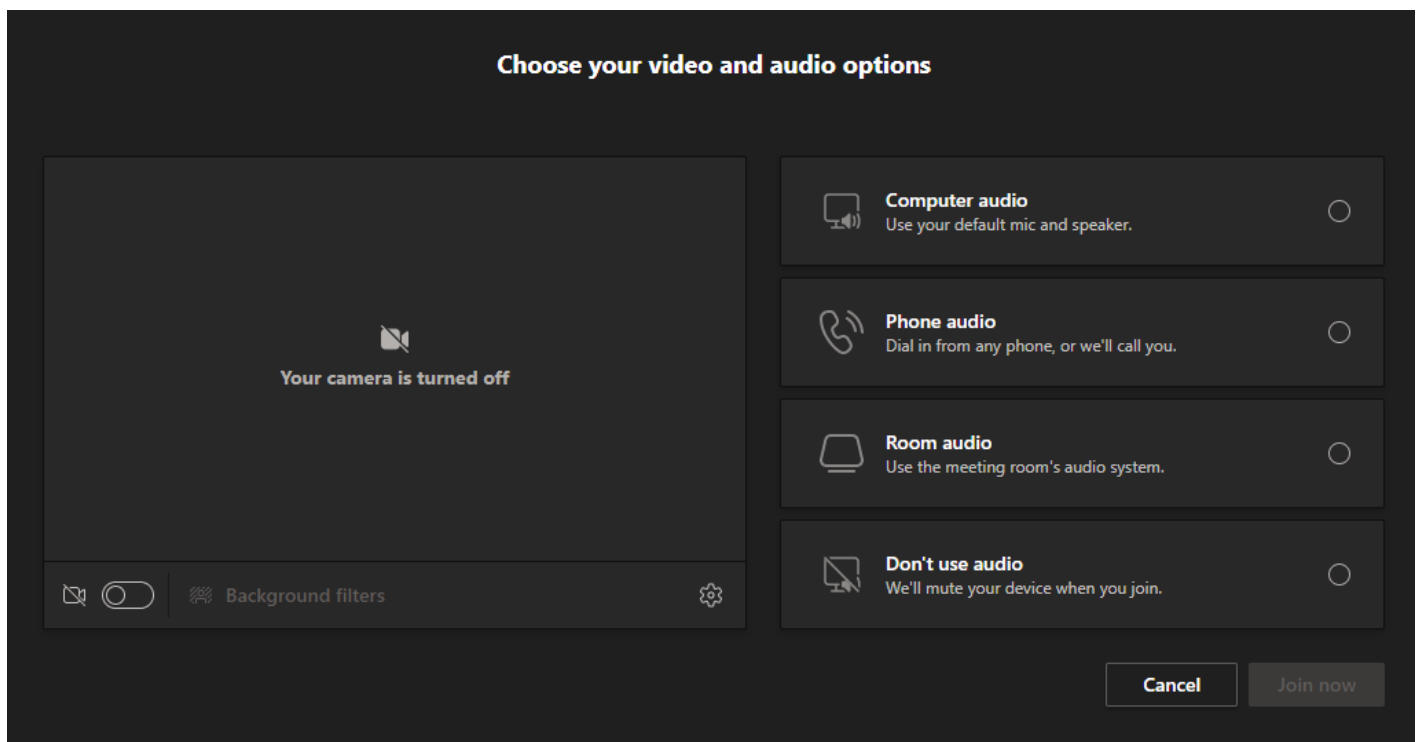
[Click here to join the meeting](#)

[Learn More](#) | [Meeting options](#)

Click on Click here to join the meeting

You may have three choices:

- **Download the Windows app:** Download the Teams desktop app.
- **Continue on this browser:** Join a Teams meeting on the web.
  - Type your name.
  - Choose your audio and video settings.
  - Select Join now.
- **Open your Teams app:** If you already have the Teams app, go right to your meeting.

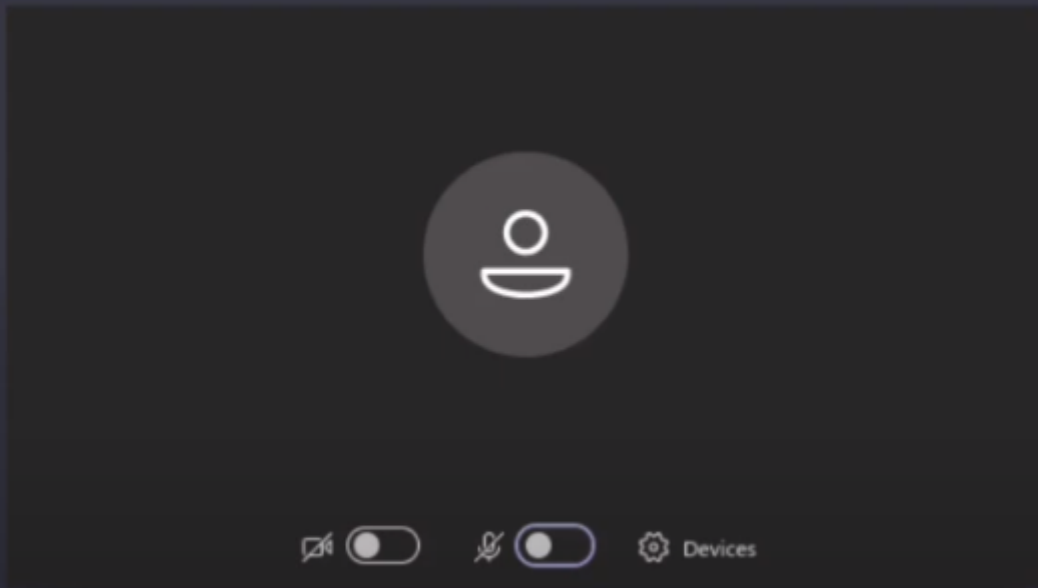


- Turn on your camera, select Background filters, and choose how you'd like to appear:
  - ■ Select a custom background.
  - ■ Select Blur.
  - Choose your audio settings.
    - Computer Audio
    - Phone audio
    - Room Audio
  - Select Join now.

Once you are in the meeting, if you are the first to join you will be in the lobby of the meeting

## When the meeting starts, we'll let people know you're waiting.

If you're the organiser or the invite came from your work or school, please sign in.

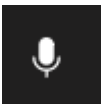


Once the Trainer joins you will automatically be admitted to the meeting

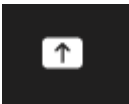
Within the meeting the controls are at the top,



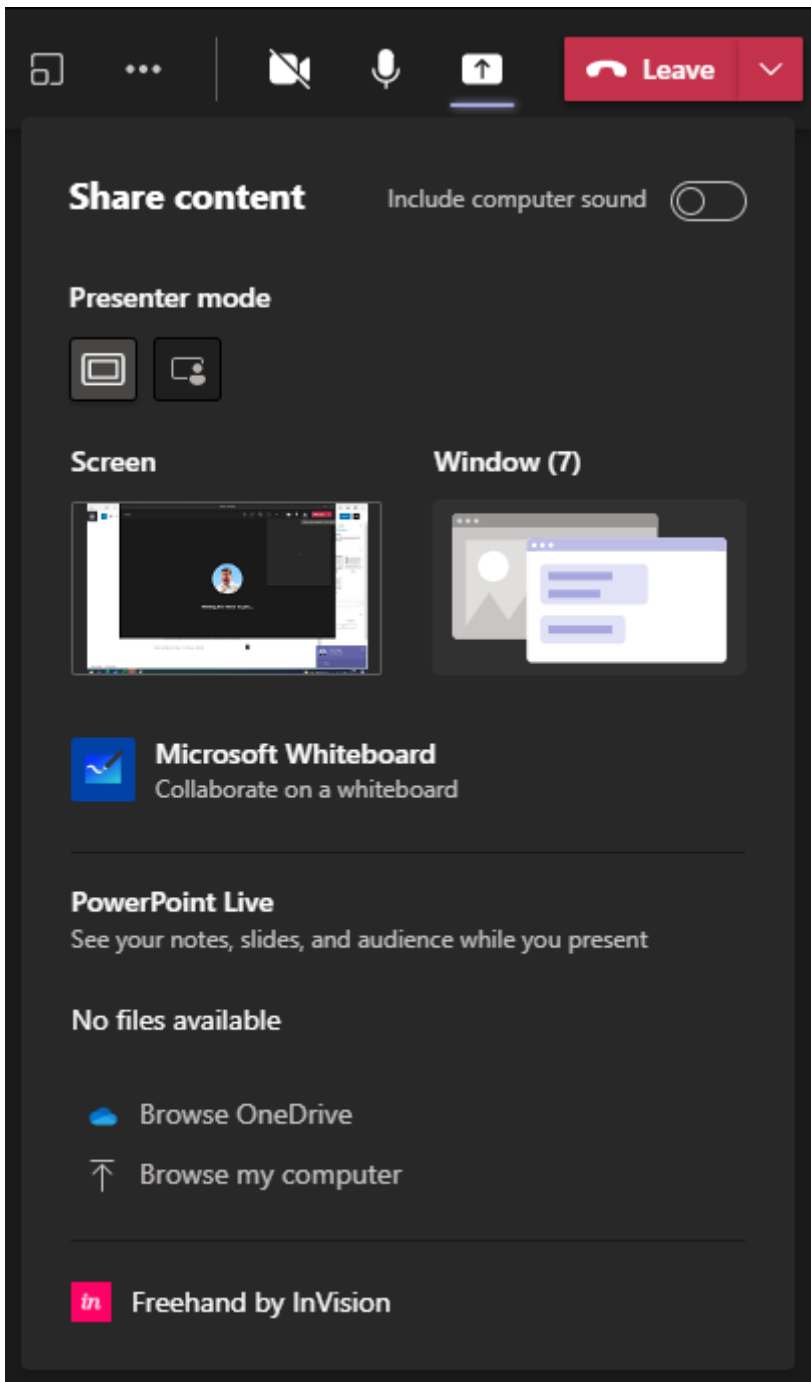
Toggling this icon will enable and disable the webcam



Toggling this icon will mute or unmute your microphone



Click this Share Icon to Share your content



You will need to use the screenshare function during the session.