

Osprey Approach: Granting Client Access to the Web Portal

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The latest version is always online at
<https://support.ospreyapproach.com/?p=30909>

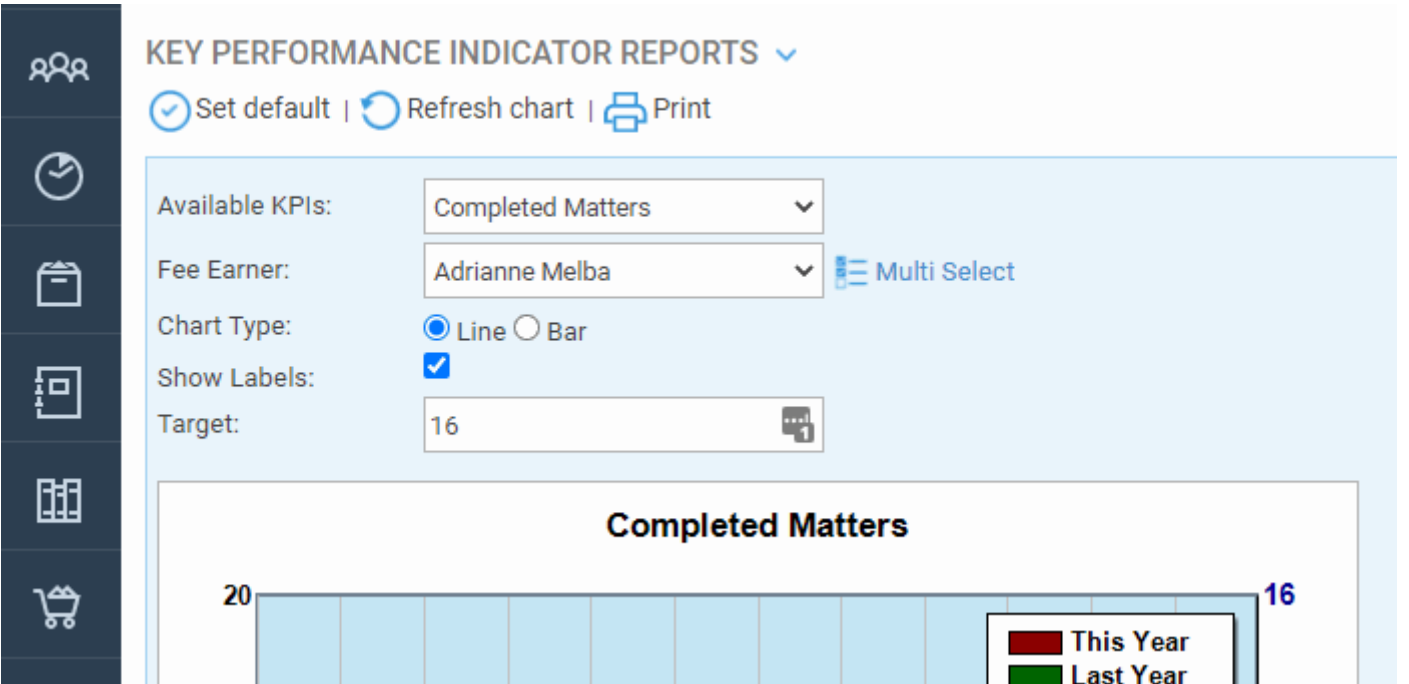


Web Enabling Clients and Matters

A client must be web enabled in order to grant them access to the Web Portal. Once enabled, you can then decide which matters belonging to a client are visible via the web portal.

Browser

To web enable a client, firstly ensure you have the primary client email address added to their file, you will not be able to Web Publish a client without one.



Select Clients & Matters > Clients > Web Publishing > Enable Access



This facility is to allow your clients to view their details via the internet. By publishing the client you will allow them to view Workflow, Key Date and Client information simply by logging into your web site. A default password will be generated to allow your clients to log in.

Client No:	<input type="text" value="B00002"/>
Client Email:	<input type="text" value="neil@pracctice.net"/>
Linked Clients:	<div><div> The following Individuals/Companies are linked to the current client/matter. Web Publisher Login information will also be emailed to them.</div><div><input type="checkbox"/> Cox Matthew</div></div>
Client Security Level:	<input type="text" value="Client"/>
Generated Name:	<input type="text" value="fiq7dkU3sH"/>
Memorable Data:	<input type="text" value="AQAAANCMnd8BFdERjHoAwE/Cl+sBAAAA"/>
Reset Password:	<input type="checkbox"/>

If there are additional parties linked to a file, you may tick their names to also generate credentials for them

Select a suitable Client Security Level

Click 'Save' and the client will receive an automated email with their log in details.

If a client forgets their password, it can be re-set by selecting the check box 'Reset Password' by navigating to Clients & Matters; Clients, Enable access. Check the box 'Reset Password' and then 'Save'.

Debtor Limit:	<input type="text" value="0.00"/>	Disbursements Limit:	<input type="text" value="0.00"/>
Date Opened:	<input type="text" value="22/08/2018"/>	Date Completed:	<input type="text"/>
Review Date:	<input type="text"/>	Review Type:	<input type="text" value="(None)"/>
Publish:	<input checked="" type="checkbox"/>		
Email:	<input type="text"/>		

Select Clients & Matters and Edit the Matter, you can toggle publishing the Matter by ticking or unticking Publish

Case Management App

To web enable a client, firstly ensure you have the primary client email address added to their file, you will not be able to Web Publish a client without one.

Osprey Approach (3.0.1)

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

Workflow Status Bar

Client/Matter - TAR00001/1 (Tarping AT Adam/Client Portal Login Test) FE: ADAMB WT: ADAMB

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

Print

Branch
Aberdeen - userid: 044837853251

Department
Civil Department

Fee Earner
AdamB

Supervising Fee Earner
AdamB

If there are additional parties linked to a file, you may tick their names to also generate credentials for them


Select a suitable Client Security Level

Click 'Save' and the client will receive an automated email with their log in details.

If a client forgets their password, it can be re-set by selecting the slider button for 'Reset Password' by navigating to Clients & Matters; Clients, Enable access. Enable the button 'Reset Password' and then 'Save'.

Web Publishing - Enable Access - Osprey Approach (3.0.1)

Enable Client Web Access - TAR00001 (Tarping AT Adam)



This facility is to allow your clients to view their details via the internet. By publishing the client you will allow them to view Workflow, Key Date and Client information simply by logging into your website. A default password will be generated to allow your clients to log in.

Client Email:

adamb@pracctice.net

Client Security Level:

Client

Temporary Password:

Reset Password

☐





Save

Delete

Cancel

Linking Associates to Published Matters

In order for Associates to be able to view specific Client cases via the Web Portal, they must firstly be linked to applicable published matters.



KEY PERFORMANCE INDICATOR REPORTS

Set default

Refresh chart

Print

Available KPIs:

Completed Matters

Fee Earner:

Adrianne Melba

Multi Select

Chart Type:


☒ Line ☐ Bar





Show Labels:

☒

Select Clients & Matters > Clients > Web Publishing > Link Associates

This area will show all of the current clients published matters along with a list of available Associates.

 From this screen you can set up which associates you want to have access to Client : B00002 and which of the enabled matters you want them to have access to.

MATTER NO	MATTER DES	LINKED	LINK/UNLINK	USER ACCESS TEMPLATE
1	Default Matter		<input type="checkbox"/>	Client
7	PRIE matter		<input type="checkbox"/>	Client
8	New Matter		<input type="checkbox"/>	Client
10	Accounts 1		<input type="checkbox"/>	Client

Firstly, select an Associate from the 'Associates' list
 Click the Link/Unlink check box to select which matters you wish to Publish to the selected Associate and then link a suitable User Access Template.
 Select the 'Update' option to confirm the link.

To unlink an Associate from published matters, select the appropriate Associate from the list. Any linked matters will show a tick in the Linked? Column, to remove this link, check the Link/Unlink box and then select 'Update'.

Web Enabling Documents from Matter History

Any type of document saved within a client's matter history can be Web Enabled and then made visible to a client and any linked Associates via the Web Portal.

	▼	🔍	🔍	🔍
★	📄	57588	B00002	Braithwaite
★	📄	48368	B00002	Braithwaite
★	📄	48364	B00002	Braithwaite
★	📄	43790	B00002	Braithwaite

Right Click the document and click Edit Details

Web Enabled

Web Enabled:

Save Cancel

Tick Web Enabled

This area will show the Client reference and also any linked associates.

Ticking the 'Apply to all users' check box will automatically Web Enable the document for all users in the list. Alternately, Click 'none' next to a record and select Read/Write to Web Enable for that specific user. Select 'Save' to save your changes.

To remove the permissions, right click the document and then change Read/Write to 'None' and save.

Web Enabling Key dates

Key dates can be web enabled in the exact same manner as documents.

Key Dates: Date: Description: More Key Dates

CLIENT & MATTER SEARCH

Client Search | Dossier Search | CRM Search | Send e

Client No: B00002

Matter No: 1

Name: Braithwaite

Matter: Default Matter

Load Client/Ma

KEY DATES

Add Export

Filter by Keydate Typ

Select Case Management > Key Dates > Add Key Date

Enter in suitable details and then check the box 'Published' to reveal the client details and any linked Associates.

Date Met ?
Create Diary Appointment ?
Published ?

☐
☐ All Day ☐ At
☒

Click 'Publish to all' and then 'Save' to link all users or change from 'None' to Read/Write against an appropriate user.

Click 'Save' to retain the changes.

To remove Published access, right click the key date in question and then amend each linked user individually and set to 'None' and select 'Save'.

It is also possible to edit existing key dates to publish and set permissions.

Web Enabling Emails and Creating Messages for Web Enabled Clients and Associates

When sending an email to a recipient via Osprey, it is possible to also create a message for a Client or Associate.


Selecting this via the Portal enables the client and associate access to read the same sent email but via the Web Portal within the 'Messages' section.

Current Cases

Matter No	Case De...	Work Type	Date Op...	Solicitor	Messages
1	Default Matter	Convey Purchase	08/22/2018	AdamB	1 New

Once any published users log into the portal, new messages will appear against relevant matters. Messages (Emails) can be viewed then marked as read.

Messages

Send message to solicitor				Mark selected messages as read	
Author	Date	Subject	Message	<input type="checkbox"/>	Actions
AdamB	17/12/2020 09:50	Email Regarding Case : Default Matter	Message	<input type="checkbox"/>	


Messages contain just the text only of the email and not the attachments. If the full email including attachment/s needs to be accessed via the Web Portal by either Associate or Client, it can be published from the matter history.

There is also an option to submit a new message to the Solicitor dealing with the matter.

Messages

Send message to solicitor

Mark se

Author	Date	Subject	Message	<input type="checkbox"/>	Actions
AdamB	17/12/2020 09:50	Email Regarding Case : Default Matter	Message	<input type="checkbox"/>	

1


10 items per page


Publishing Emails

Any sent emails are automatically saved into the matter History. These can be published via the Web Portal in the exact same manner as published documents. Published emails are accessed within the same area as Published documents when logging into the Web Portal.

To create a message that is accessible to both the Client and Associate via the web portal, select 'Send Email'. This option is available within the search area at the top of most Osprey menus and also from within matter history.

Send e-mail

 Attach

 Signature

Template: (none)

High Importance: ☐

Low Importance: ☐

Create message for client: ☐

Create message for associate: ☐

If you wish to copy in an associate or a client, ensure the boxes are checked to the right hand side of the message then send as normal.