Osprey Approach: Searching for Clients

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The latest version is always online at
https://support.ospreyapproach.com/?p=874

Osprey
Approach

Osprey gives you several ways of searching for your clients in the system. Included in these are the Name Search, Matter Detail search and full client/matter search.

There are several ways of searching for a client.

Name Search

Select the 'Name' Magnifying Glass

You may use this method if you know all or part of the client's surname.

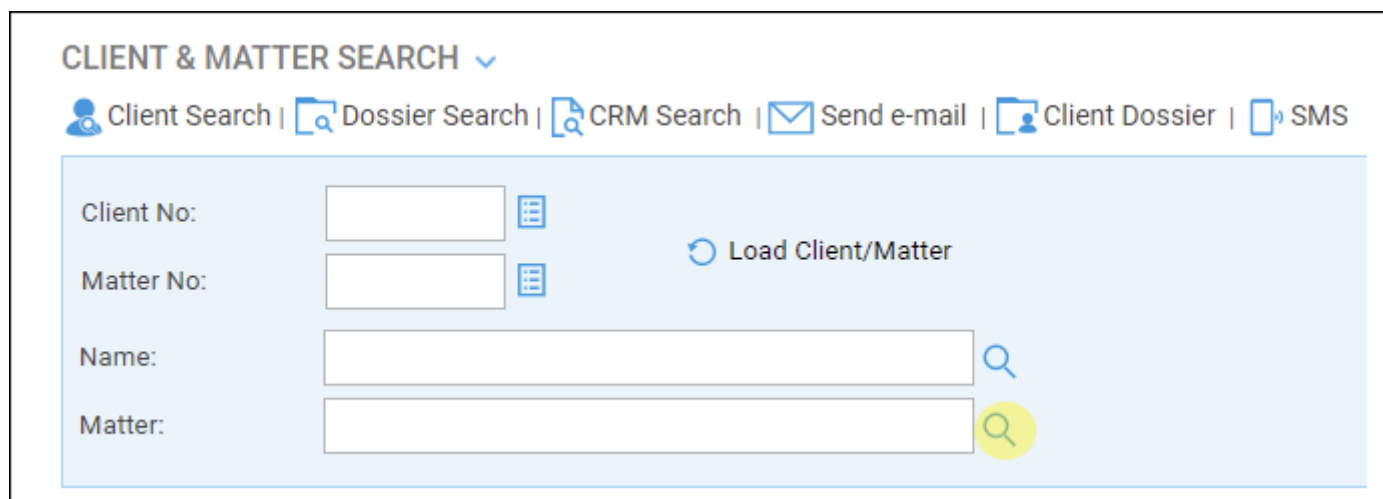Type into the 'Enter Surname Search Criteria' box and click 'Search'

Examples:

If you know that the client's surname is Smith, enter 'Smith'. This search will find clients whose names are exactly Smith.

If you think his name may end in son, then enter ..son and click search. This search would find Thomason, Jameson, Williamson, etc.

If you know his name contains a certain string of characters, but are not sure of the beginning and end, enter the characters in between the wildcard. For example, search criteria of ..one.. would find Jones, Monet etc.

Matter Description Search

Use this if you know all or part of the matter description.
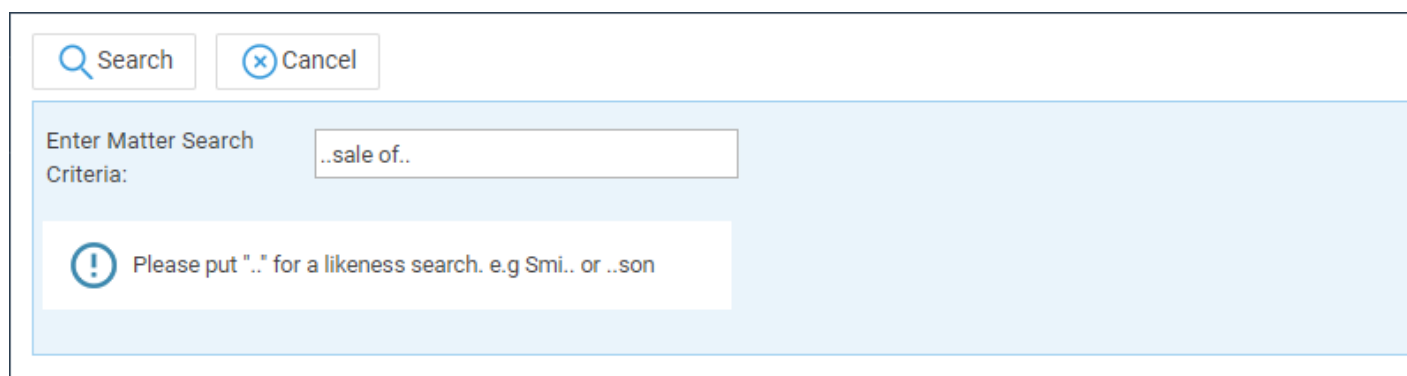
Select the 'Matter' Magnifying Glass

Use the wildcards as above in the client name search – the example above will find any matter description containing "Sale of" – e.g. Sale of <property name>.

Full Client/Matter Search

Use this option for more advanced searching.

Select 'Client Search'

Use this screen to enter any information that you know about the client.

All fields that can be typed in can use the wildcard search as explained above.

This includes the client number box, so if your numbering convention is e.g. the first 3 letters of the surname, then a number, you could type e.g. BRO.. to find all client numbers beginning with BRO.

You can choose a certain work type and fee earner only if you know who is doing the work and what it relates to, as well as searching for legally aided or private matters only.

You can also choose to select whether or not to include archived matters in your search.

Dossier Search

If you are using the Dossier area to hold database information, you can search for specific records using these fields.

Select Dossier Search

Select a Dossier Page from the drop-down list.

Select a field within that Dossier Page from the Dossier Fields drop-down list.

Select either Equal (Exact Match), Not Equal (Not an Exact Match), or Like

Enter the Value to search for

Select Add Filter

The search criteria set will be displayed underneath.

You can add as many criteria as you require, and edit or delete any of the existing criteria.
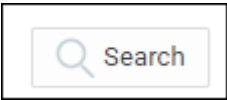
Select Search

The results will be displayed

Global search

You can also use the Global search option. The Global search searches all areas of Osprey with no requirement for a wildcard to be entered and returns all matches. For example to search for Mitzi Broom

you can search for either Mitzi or Broom. Should you know the client number you may enter this instead.

Once you have entered your search details in the Global search box and clicked the magnifying glass icon to perform your search, you can further filter the results found, as well as amending the layout of the columns.

To turn on the filter row, click the column chooser icon, and tick the Show Filter Row box:

When the filter row is turned on, you can search for additional values within each column of your search results:

In the top right of the search results screen, you can clear any grid filters you have added by clicking the Clear Grid Filters icon:
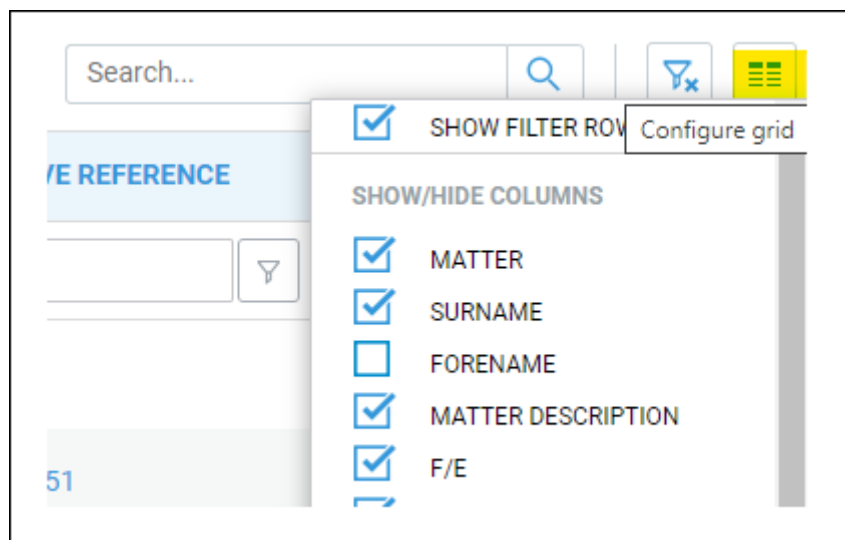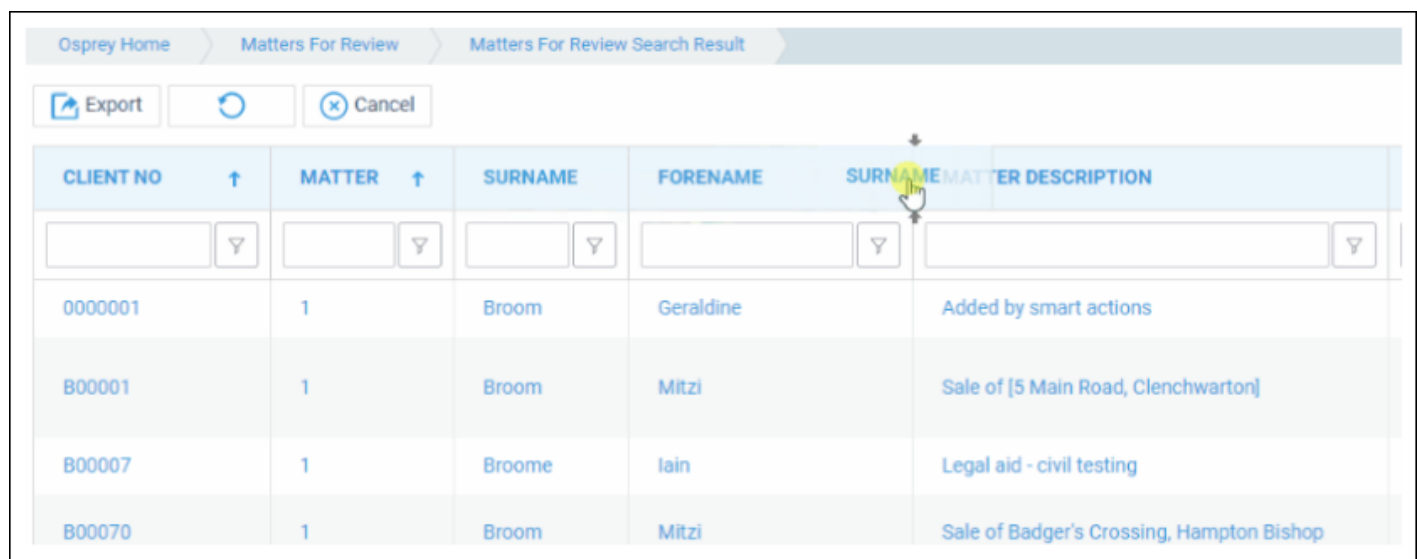
To change the columns that are displayed in the Global search, click the Configure Grid icon, and tick / untick the columns that you want to show/hide:

To reorder columns in the display, simply click and drag the column heading you want to move, and drag it to the required position:

You can also resize columns to fit:

To select a matter, simply click one of the columns of data for the relevant matter.

- Clicking any client information will take you to the Client Details page
- Clicking any matter information will take you to the Matter Details page
- If you have enabled the WIP Balance column, clicking this will take you to the Time Recording page.
- If you have enabled the Client Balance column, clicking this will take you to the client ledger.

You can also export your results to Excel/CSV using the Export button in the top left hand corner: