



Osprey Approach: Use of the COLP/COFA functionality

This help guide was last updated on
Dec 21st, 2022

The latest version is always online at
<https://support.ospreyapproach.com/?p=2528>



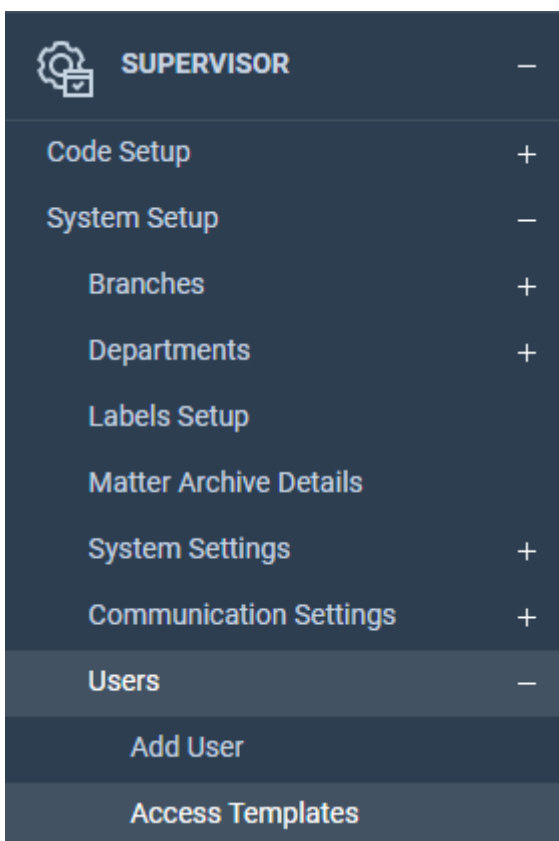
You can utilise the COLP and COFA functionality in Osprey.

In addition to the COLP areas covered by worktypes, the following areas are available accessed within the Case Management menu:

- Oaths
- Storage
- Fee Sharing & Referrals
- Introductions to Third Parties
- Equality and Diversity Breaches

Change the Access Template


To obtain full access to these areas, navigate to your 'Supervisor' tab and select 'System Setup'. Go to 'Users' and then select 'Access Templates'.



Within the 'Supervisor' area of the Access Template, ensure that the below check boxes for COLP/COFA and 'List Management' are ticked.

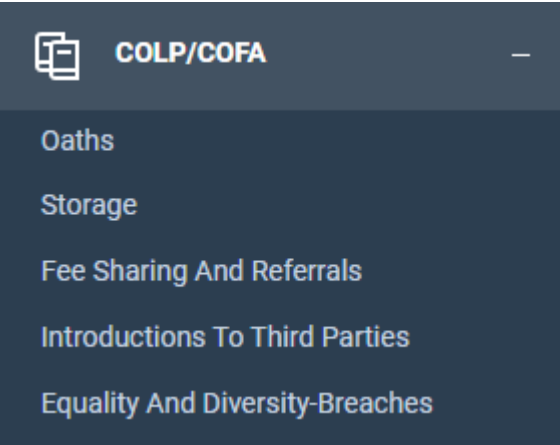
- ☒ Case Management Setup
 - ☒ KPI Details
 - ☒ KPI Details
 - ☒ Debt Recovery
 - ☒ Expert Types
 - ☒ Key Date Types
 - ☒ Formulae
 - ☒ Standard Documents
 - ☒ Workflows
 - ☒ Tasks
 - ☒ Dossier Pages
 - ☒ Dossier Fields
 - ☒ Workflow Sections
 - ☒ Setup Conveyancer Portal
 - ☒ Import XML File
 - ☒ Adjust Workflow Dates
 - ☒ RTAPI Claim Fields Mapping
 - ☒ E-mail Templates
 - ☒ Matter History
 - ☒ Smart Actions
- ☒ COLP/COFA
 - ☒ List Management

Now select the 'COLP/COFA' option on the main list of template areas and select the 'Allow Area Access' link at the top. Ensure that the relevant areas of COLP/COFA that you wish to use are ticked, then click 'Save'.

- ☒  **COLP/COFA**
 - ☒ Oaths
 - ☒ Storage
 - ☒ Fee Sharing And Referrals
 - ☒ Introductions To Third Parties
 - ☒ Equality And Diversity-Breaches

Making use of COLP/COFA

Once access has been enabled, relevant users will be able to access COLP List Management via an independent entry beneath Smart Actions:



The screen shows all current lists, with one entry for each list item. Data available is Area Type, List Type, Value, Created Date, Created by, Last Modified Date and Last Modified By.

New Clone Export						
ADMINISTRATOR NAME	ADMINISTRATOR AUTHORISED	ADMINISTRATOR STATUS	COMMENTS	DATE	PROPERLY AUTHORISED	TYPE
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
crisrina	Yes	Solicitor	Case Research	06/09/2018	Yes	Affirmation
Supervisor	No	Licensed Conveyancer	OK	26/07/2018	No	Oath

Columns can be dragged to expand or contract, can be sorted into ascending or descending order and can be hidden or shown as required.

New items can be added to a list, and lists can be edited, cloned and deleted. List Management is available for all COLP lists, except where the content is pre-defined.

To add a new list, click on 'New' at the top of the screen.



Now select 'Area Type', then choose a 'List Type'. Please note that there is no option for Fee Sharing and Referrals as all the lists here are pre-defined.

New List Management

Area Type:

List Type:

Value:

OK

Cancel

In terms of list type, you have several options:

Oaths

New List Management

Area Type:

Oaths

List Type:

Oaths Administrator Status

Oaths Type

Value:

OK

Cancel

Storage

New List Management

Area Type:

Storage

List Type:

Value:

Storage Type

Storage Location

Storage Reference

OK

Cancel

Introduction to Third Parties

New List Management

Area Type:

Introduction To Third Par

List Type:

Value:

Introductions To Third Parties Purpose

OK

Cancel

Equality and Diversity Breaches

New List Management

×

Area Type:

Equality And Diversity Br

▼

List Type:

▼

Value:

Equality And Diversity Breaches Complaina

Equality And Diversity Breaches Status Part

Equality And Diversity Breaches Status Part

OK

Cancel

Then type in the text required into the Value field, and Save. Repeat as required.

In terms of user level access to COLP/COFA, the tab is available on the left-hand menu.

COLP/COFA

—

Oaths

Storage

Fee Sharing And Referrals

Introductions To Third Parties

Equality And Diversity-Breaches

Please note that if the tab does not appear, it is likely that your access template does not allow you to view this area of Osprey. Please contact your system supervisor to arrange access.

The COLP/COFA functionality offers a number of search and filter options which may be new to users. The details below apply to all COLP areas.

Click at the far right of any search field to reveal Filter Options. Each Search can be set up with individual filter options, if required:

	Filter on	▶
	Filter type	▶
	Clear filter	
	Clear all filters	

Select 'Filter On' will allow you to select the option for 'Keyup', which means that the filter can be set to operate as soon as characters are typed into the search box, or 'Enter Key', which will only operate upon clicking 'Enter' on your keyboard.

The screenshot shows a dropdown menu with the following options:

- Filter on: Enter key
- Filter type: Keyup (selected with a checkmark)
- Clear filter
- Clear all filters

The 'Filter Type' area allows you to select an 'Exact Filter' to match the typed text exactly, or the 'Starts With' filter in which you can add the start of your text, then search.

'Expression Filter' looks for patterns in text data – the use of * means “match zero or more of the following characters” – eg *thd** would return results for “Third Party Introductions” as well as “Oaths Administrator”.

The screenshot shows a dropdown menu with the following options:

- Filter type: Starts with filter (selected with a checkmark)
- Exact filter
- Expression filter
- Clear filter
- Clear all filters

Oaths

Clicking on the 'Oaths' heading will reveal all records on the database. Clicking on a particular record will bring up the details for this particular record on the right-hand side of the screen.

ADMINISTRATOR NAME	ADMINISTRATOR AUTHO...	ADMINISTRATOR STATUS	COMMENTS	DATE	PROPERLY AUTHORISED	TYPE
cristina	Yes	Solicitor	Case Research	06/09/2018	Yes	Affirmation
Supervisor	No	Licensed Conveyancer	OK	26/07/2018	No	Oath

Clone

Administrator Name	cristina
Administrator Authorised	Yes
Administrator Status	Solicitor
Comments	Case Research
Date	06/09/2018
Properly Authorized	Yes
Type	Affirmation

Alternatively, right-click on one of the available records and click 'View' to bring up the details panel.

To add a new record, select the 'New' icon on the top toolbar and enter the data as required. Then select 'Save' once complete.

New - Oath

Administrator Name*:

?

Administrator Authorised:

☐

?

Administrator Status*:

Please select

?

Comments*:

?

Date*:

Properly Authorised:

☐

Type*:

Please select

Save

Cancel

Within the 'Record Details' side panel, select the 'Attachments' tab to view any available documents attached. These can be viewed, downloaded, deleted and added. Right-click an attachment to view options for deleting and downloading.

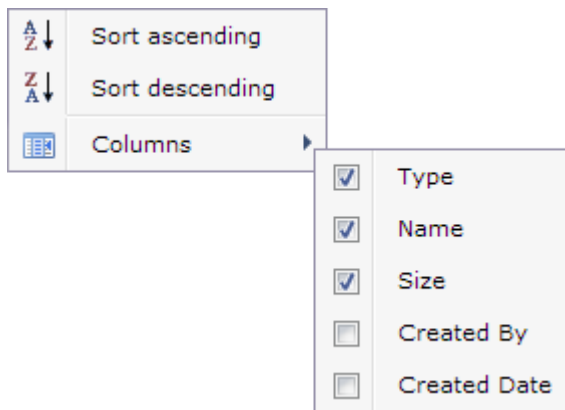
Record Details	Attachments	Client/Matter
----------------	-------------	---------------

New

TYPE	NAME	SIZE
<div></div>	<div></div>	<div></div>
<div>JPG</div>	C:\User...top\buchare...	72.10 Kb
<div>PDF</div>	C:\User...uments\all fil...	621.88 ...

To add an attachment click on the 'New' icon and browse to the required document. Click 'Open' and the document will be saved to the record. Repeat for as many documents as are required.

The following column options are available within the Attachment details area.



You may also assign particular records to clients or matters if required. Left click on the relevant record and then select the 'Client/Matter' tab. Click 'New' and you may now either type in the details required or select the drop-down arrow for further search options.

Records can be assigned at Client level or at Matter level. They can be assigned to more than one Client and/or Matter.

Record Details

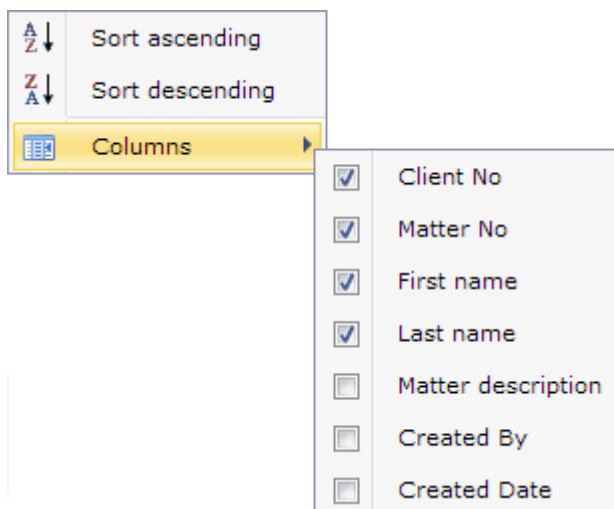
Attachments

Client/Matter

+ New

CLIENT NO	MATTER NO	
<input type="text"/>	<input type="text"/>	
B00094	4	
B00094	3	
S00002	1	
D00001	1	

Within the 'Client/Matter' tab, you have the following column options.



Individual records can be printed by selecting the 'Print' option within the 'Record Details' area.



Storage

Clicking on the ‘Storage’ heading will reveal all records on the database. Clicking on a record will bring up the details for this particular record on the right-hand side of the screen.

NewCloneExport

TYPE	DETAILS	LOCATION	REFERENCE	DATE DEPOSIT	DEPOSITED BY	DATE RETRIEV...	RETRIEVED BY	REASON RETRI...	RETURNED TO	DATE RETURN
Will	Will Test W00...	Wills Test	DWON123	30/05/2019	Ethan Test					
Will	Will Test	Cellar	11233	30/05/2019	Ethan	12/09/2019				
Will	Mr Matthews...	Cellar	1234856	17/04/2019	craig					
Chelsea Test	Chelsea Test	Chelsea Test	Chelsea Test	10/04/2019	Chelsea	10/04/2019	Chelsea	Chelsea	Chelsea	10/04/2019
Will & LPA	Chelsea Test	Cellar	12345	02/04/2019	Chelsea					
Will	New Will	Basement	11233	18/09/2018	neil					

Record DetailsAttachmentsClient/Matter

ClonePrintRefresh

Type	Will
Details	Will Test W00016
Location	Wills Test
Reference	DWON123
Date Deposit	30/05/2019
Deposited By	Ethan Test
Date Retrieval	
Retrieved By	
Reason Retrieval	
Returned To	
Date Return	
Comments	

Alternatively, right-click on one of the available records and click 'View' to bring up the details panel.

To add a new record, select the ‘New’ icon on the top toolbar and enter the data as required. Then select ‘Save’ once complete.

New - Storage

Type*:
Please select

Details*:

Location*:
Please select

Reference*:
Please select

Date Deposit*:

Deposited By*:

Date Retrieval:

Retrieved By:

Reason Retrieval:

Returned To:

Date Return:

Comments:

Save

Cancel

Within the 'Record Details' side panel, select the 'Attachments' tab to view any available documents attached. These can be viewed, downloaded, deleted and added. Right-click an attachment to view options for deleting and downloading.

Record Details	Attachments	Client/Matter
<div> <div>New</div> <div></div> <div></div> </div>		
TYPE	NAME	SIZE
	C:\Users\Ethan\Desktop\Will Test For ...	11.61 Kb

To add an attachment click on the 'New' icon and browse to the required document. Click 'Open' and the document will be saved to the record. Repeat for as many documents as are required.

The following column options are available within the Attachment details area.

A ↓
Z ↓

Sort ascending

Z ↓
A ↓

Sort descending

Columns

▶

☒ Type

☒ Name

☒ Size

☐ Created By

☐ Created Date

You may also assign particular records to clients or matters if required. Left click on the relevant record and then select the 'Client/Matter' tab. Click 'New' and you may now either type in the details required or select the drop-down arrow for further search options. Records can be assigned at Client level or at Matter level. They can be assigned to more than one Client and/or Matter.

Record Details

Attachments

Client/Matter

⊕ New

📄

🔄

CLIENT NO	MATTER NO	
<div>🔍</div>	<div>🔍</div>	
W00048	1	

Within the 'Client/Matter' tab, you have the following column options.

A ↓
Z ↓

Sort ascending

Z ↓
A ↓

Sort descending

Columns

▶

☒ Client No

☒ Matter No

☒ First name

☒ Last name

☐ Matter description

☐ Created By

☐ Created Date

Individual records can be printed by selecting the 'Print' option within the 'Record Details' area.



Fee Sharing and Referrals

After selecting the 'New' button under 'Fee Sharing & Referrals', complete all relevant data in respect of the Fee Sharing Arrangement by checking the relevant boxes.

New - Fee Sharing And Referral

Referred?: ☐ ?

Fees Shared?: ☐ ?

Referrer Interests?: ☐ ?

Fee Sharing Arrangement?: ☐ ?

Written Agreement?: ☐ ?

Information to Client: ☐ ?

Best Interests?: ☐ ?

Reputable Parties?: ☐ ?

Criminal Proceedings?: ☐ ?

Public Funding?: ☐ ?

Breach?: ☐ ?

Monitoring?: ☐ ?

Fair Treatment?: ☐ ?

Save

Cancel

Left-click the check box one or more times to cycle through the options.

- A tick in the box means 'Yes'.
- A solid square in the box means 'Not Applicable'
- An empty box means 'No'

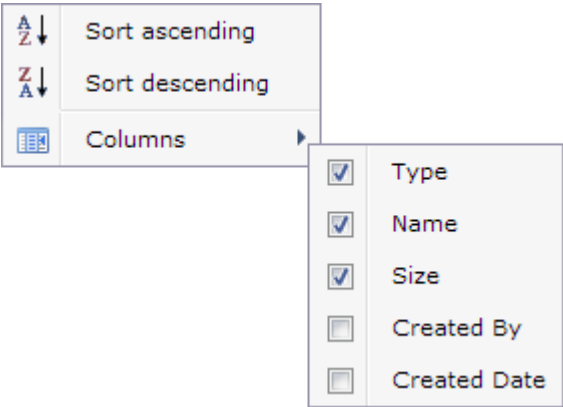
When the report is run, 'Yes' results show as 'True'. 'No' results show as 'False' and 'Not Applicable' results show as blank.

Within the 'Record Details' side panel, select the 'Attachments' tab to view any available documents attached. These can be viewed, downloaded, deleted and added. Right-click an attachment to view options for deleting and downloading.

Record Details	Attachments	Client/Matter
<div> <div>New</div> <div></div> <div></div> </div>		
TYPE	NAME	SIZE
<input type="text"/>	<input type="text"/>	<input type="text"/>
	Osprey Approach Standard Documents...	546.00 ...

To add an attachment click on the 'New' icon and browse to the required document. Click 'Open' and the document will be saved to the record. Repeat for as many documents as are required.

The following column options are available within the Attachment details area.

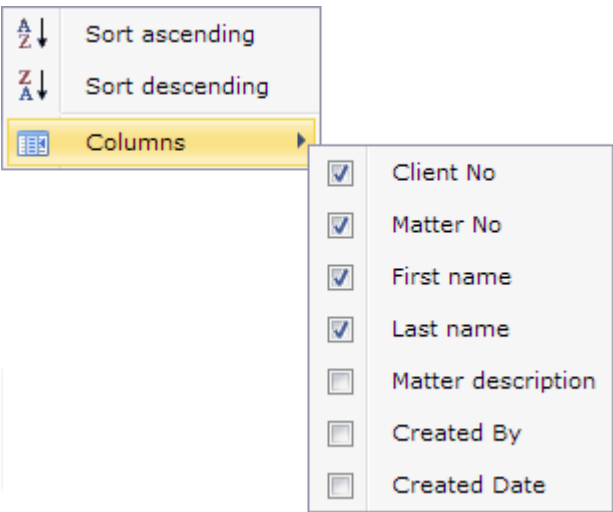


You may also assign particular records to clients or matters if required. Left click on the relevant record and then select the 'Client/Matter' tab. Click 'New' and you may now either type in the details required or select the drop-down arrow for further search options.

Records can be assigned at Client level or at Matter level. They can be assigned to more than one Client and/or Matter.

Record Details		Attachments	Client/Matter
<div>New </div>			
CLIENT NO	MATTER NO		
<input type="text"/>	<input type="text"/>		
D00001	3		

Within the 'Client/Matter' tab, you have the following column options.



Individual records can be printed by selecting the 'Print' option within the 'Record Details' area.



Introductions to Third Parties

After selecting the 'New' button under 'Introductions to Third Parties', complete all relevant data in respect of the introduction by checking the relevant boxes and filling in any fields.

New - Introduction To Third Party

Recommendation?: ☐ ?

TP Name*: ?

TP Address: ?

TP Business: ?

Purpose*:

Please select

 ?

Best Interests?: ☐ ?

Suitable?: ☐ ?

Limitations?: ☐ ?

Client Informed?: ☐ ?

Details: ?

Independence Compromised?: ☐ ?

Interest In Referral?: ☐ ?

Client Informed?: ☐ ?

Investment Advice?: ☐ ?

Independent Intermediary?: ☐ ?

Appointed Representative?: ☐ ?

Save


Cancel

Left-click the check box one or more times to cycle through the options.

- A tick in the box means 'Yes'.
- A solid square in the box means 'Not Applicable'
- An empty box means 'No'

When the report is run, 'Yes' results show as 'True'. 'No' results show as 'False' and 'Not Applicable' results show as blank.

Within the 'Record Details' side panel, select the 'Attachments' tab to view any available documents attached. These can be viewed, downloaded, deleted and added. Right-click an attachment to view options for deleting and downloading.

Record Details		Attachments	Client/Matter
<div> <div>+</div> New <div>📄</div> <div>↺</div> </div>			
TYPE	NAME		SIZE
<input type="text"/>	<input type="text"/>		<input type="text"/>
	Doc1.docx		100.92 ...

To add an attachment click on the 'New' icon and browse to the required document. Click 'Open' and the document will be saved to the record. Repeat for as many documents as are required.

The following column options are available within the Attachment details area.

A
Z

Sort ascending

Z
A

Sort descending

📄

Columns

☒

Type

☒

Name

☒

Size

☐

Created By

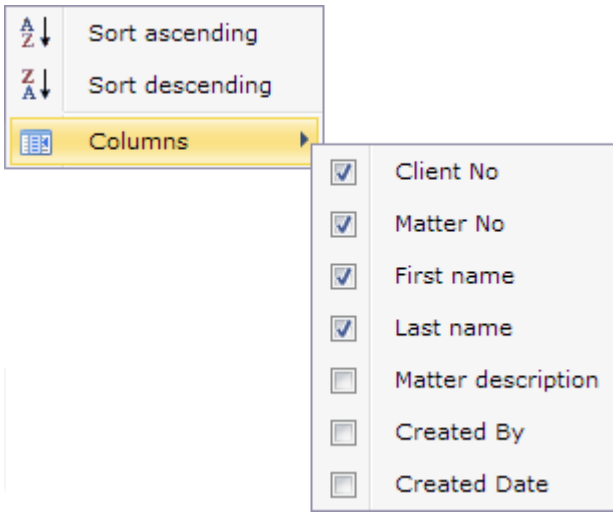
☐

Created Date

You may also assign particular records to clients or matters if required. Left click on the relevant record and then select the 'Client/Matter' tab. Click 'New' and you may now either type in the details required or select the drop-down arrow for further search options. Records can be assigned at Client level or at Matter level. They can be assigned to more than one Client and/or Matter.

Record Details		Attachments	Client/Matter
<div> <div>+</div> New <div>📄</div> <div>↺</div> </div>			
CLIENT NO	MATTER NO		
<input type="text"/>	<input type="text"/>		
D00001	3		

Within the 'Client/Matter' tab, you have the following column options.



Individual records can be printed by selecting the 'Print' option within the 'Record Details' area.



Equality and Diversity Breaches

After selecting the 'New' button under 'Equality & Diversity Breaches', complete all relevant data in respect of the introduction by checking the relevant boxes and filling in any fields.

New - Equality And Diversity-Breach

Complainant Name*:

?

Complainant Status*:

Please select

?

Cited Party (1)*:

?

Status Party (1)*:

Please select

?

Cited Party (2):

?

Status Party (2):

Please select

?

Breach Details*:

?

Reported By*:

?

Reported To*:

?

Date Reported*:

?

Save


Cancel

Left-click the check box one or more times to cycle through the options.

- A tick in the box means 'Yes'.
- A solid square in the box means 'Not Applicable'
- An empty box means 'No'

When the report is run, 'Yes' results show as 'True'. 'No' results show as 'False' and 'Not Applicable' results show as blank.

Within the 'Record Details' side panel, select the 'Attachments' tab to view any available documents attached. These can be viewed, downloaded, deleted and added. Right-click an attachment to view options for deleting and downloading.

Record Details	Attachments	Client/Matter
<div> <div>+</div> New <div>📄</div> <div>🔄</div> </div>		
TYPE	NAME	SIZE
<input type="text"/>	<input type="text"/>	<input type="text"/>
	Osprey Approach Standard Documents...	546.00 ...

To add an attachment click on the 'New' icon and browse to the required document. Click 'Open' and the document will be saved to the record. Repeat for as many documents as are required.

The following column options are available within the Attachment details area.

A
Z

Sort ascending

Z
A

Sort descending

Columns

☒ Type

☒ Name

☒ Size

☐ Created By

☐ Created Date

You may also assign particular records to clients or matters if required. Left click on the relevant record and then select the 'Client/Matter' tab. Click 'New' and you may now either type in the details required or select the drop-down arrow for further search options. Records can be assigned at Client level or at Matter level. They can be assigned to more than one Client and/or Matter.

Record Details

Attachments

Client/Matter

New

CLIENT NO	MATTER NO	
<div><div></div></div>	<div><div></div></div>	
D00001	3	

Within the 'Client/Matter' tab, you have the following column options.

A
Z

↓

Sort ascending

Z
A

↓

Sort descending

Columns

Client No

Matter No

First name

Last name

Matter description

Created By

Created Date

Individual records can be printed by selecting the 'Print' option within the 'Record Details' area.