Osprey Approach: Using the Dossier (App)

This help guide was last updated on
Dec 27th, 2023

The latest version is always online at
https://support.ospreyapproach.com/?p=44865

Osprey™ Approach

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.

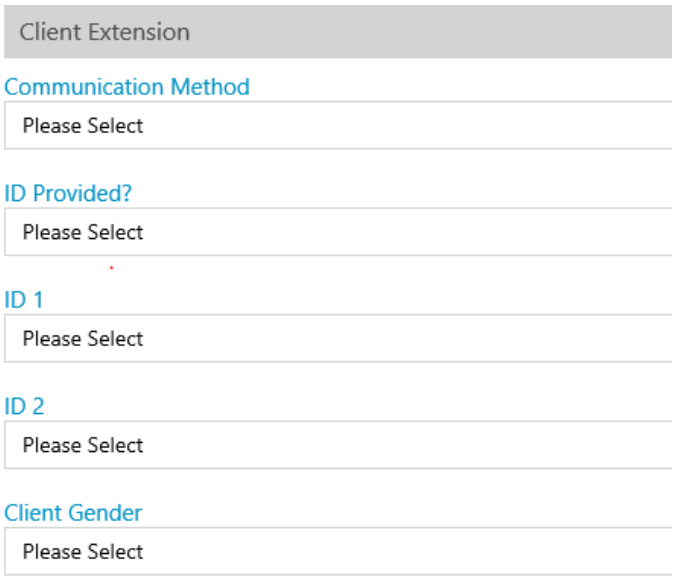
Client level will relate to the client themselves and can capture information that would not change between areas of law.
Examples of Client Level Dossier fields: *Date of Birth, National Insurance Number, Passport Number*, *Company Registration Number*.

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.



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.



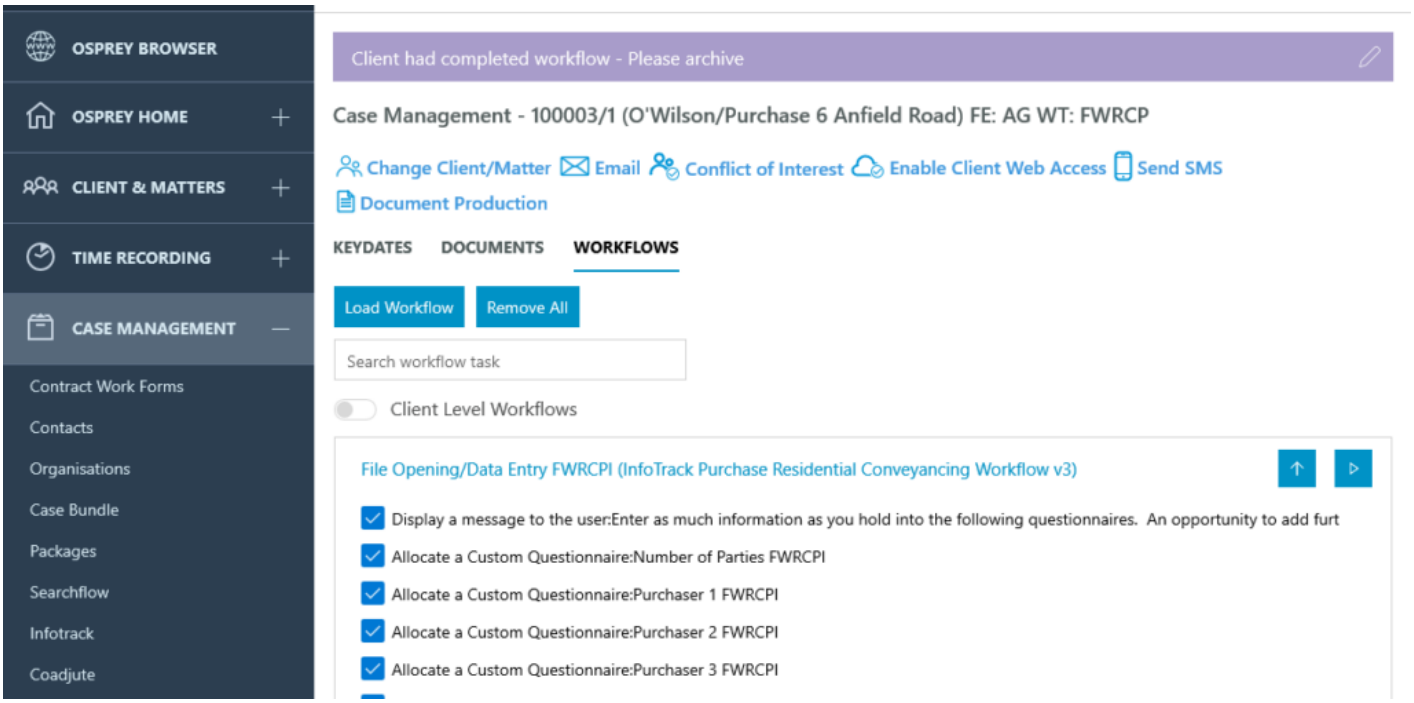
Capture this information where possible and click Save.

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.

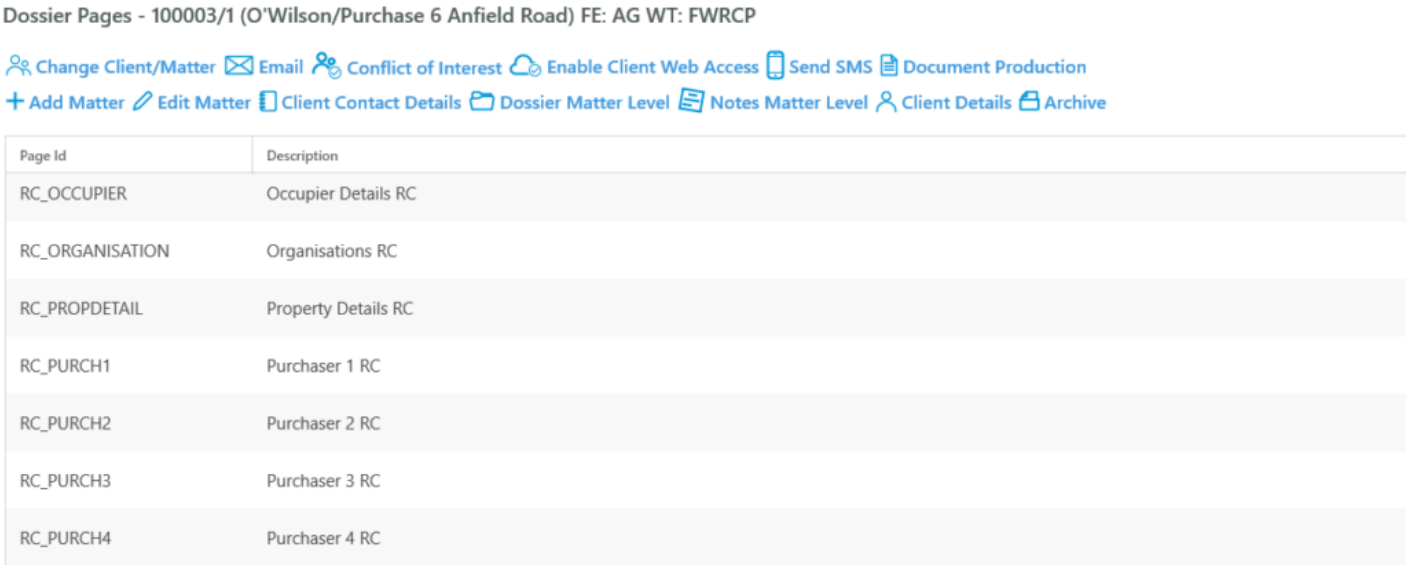
These are produced through workflows, which can be accessed from Case Management, and selecting the Workflows tab.



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



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

Solicitor Title
Mr

Solicitor First Name
John

Solicitor Second Name

Solicitor Surname
Jones

Solicitor Telephone
01234 567890

Solicitor Email
john@jones.com

Solicitor Firm Name
Jones and Jones

Solicitor DX
DX 12345

Solicitor Building Name
The Oaks

Solicitor Street Number

Solicitor Street Name
High street

Solicitor Town
Townington

Solicitor County
Countryshire

Solicitor Postcode
AB1 2CD

Solicitor DX 2