

Osprey Approach: Add an Item to the Matter History

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The latest version is always online at
<https://support.ospreyapproach.com/?p=35304>

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Any digital files you have stored locally, or on a network drive, can be uploaded to the matter history against your clients to enable a fully paperless office.

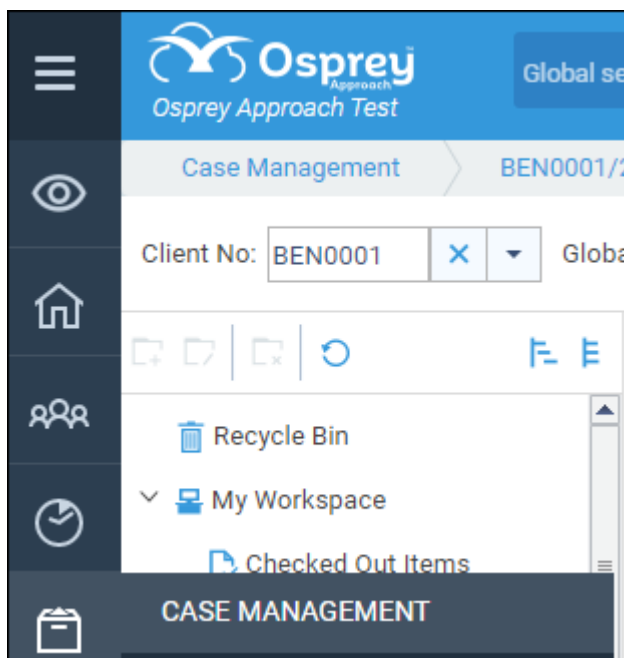
To add a new document, you can use either of the methods below.

Manually add a document or use drag & drop to store items in the matter history

Drag & drop files

You can quickly and easily upload files to a client's matter history with drag & drop.

Load the client and matter to which you'd like to save the file. Once loaded, access the Matter History by clicking Case Management.



If you wish to upload to a Matter History folder, ensure you have the correct folder selected.

Ensure you can view the file from a Windows File Explorer window or can see the file on the Desktop.

Left click using your mouse, and whilst continuing holding the mouse button down, drag the file(s) into the matter history. Release the mouse button, and an upload confirmation will appear.

You can also select multiple documents to upload.

Please note that Osprey will not upload folders of files. All folder contents must be uploaded separately.

Manually add a document

Click the New > Upload to open the New Matter History Item window.

The screenshot displays the Osprey Case Management interface. At the top, a blue header bar shows 'Osprey Approach Test' and 'Today's Value: £0.00'. Below this, a grey bar indicates 'Case Management' and '100003/1 (O'Wilson) FE:DH WT:FWRCP Purchase 6 Anfield Road'. The main area contains fields for 'Client No: 100003', 'Global: ☐', and 'Matter No: 1'. A 'Set permissions' button and a 'Keyword' field are also visible. A 'New' dropdown menu is open, showing 'Upload' and 'Text Only' options. Below the menu, there are search filters and a table with columns 'REF NUMBER' and 'DETAILS'.

REF NUMBER	DETAILS

Click the ellipsis (...) button beside File**: to select a file from your computer. Add a description and add any other further details if required.

New Matter History Item

Client No**:

100003

X

Global: ☐

Matter No**:

1

X

Custom Type:

Folder:

Text Only: ☐

File**:

client care letter.docx

X

...

Processed date:

Retention Period:

Retention Date:

Description

CCL Cli Response

Web Enabled

Web Enabled:

☐

Save

Cancel

Click Save. The file will now be uploaded to the Matter History.