

Osprey Approach: Create a Package of files (Browser)

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Jan 19th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=21865>



Osprey Help Centre

Web Publishing

File System

CLIENTS & MATTERS

TIME RECORDING

CASE MANAGEMENT

CLIENT LEDGERS

NOMINAL LEDGERS

PURCHASE LEDGERS

Available KPIs:

Completed Matters

Fee Earner:

Adrianne Melba

Chart Type:

Line

Bar

Show Labels:

Target:

16

Completed Matters












20


15


10









Select Case Management and in the Workspace click Packages


ant No: B00002   Global: ☐ Matter No: 1   Set permissions Keyword search:









      New  Send E-mail  Edit  Delete  Download 





 Recycle Bin

 My Workspace

-  Checked Out Items
-  In Tray Items
-  Favorite Items
-  Recent Items
-  Subscribed Items
-  Deal Room
-  Case Bundles
-  Packages


 Matter History

- >  0__Adelini
- >  0_Adelini
- >  0_Test
- >  0000
- >  1_20_1
- >  123 folder
-  ChrisF
-  Client Correspondence


TYPE	CLIENT NO	CLIENT SURNAME	MATTER NO
			

Click New

You may choose to generate either a zip file or a pdf. If a PDF is chosen, all of the files chosen are saved to one PDF:

Name	Date modified	Type	Size
Today (1)			
 4d9704f9-07f4-48f1-878f-d334f2c56fb3	11/08/2020 10:29	Adobe Acrobat D...	588 KB

If a ZIP file is chosen, all of the files are zipped up into a zip file which will extract to give the files in the same format as they are stored in the matter history.

Name	Date modified	Type	Size
Today (1)			
 028711c0-c48a-4ecd-81ce-56ec7bf2d32c	11/08/2020 10:28	Compressed (zipp...	1,566 KB

You can also choose whether the package will expire to prevent your clients from opening them after a certain date has passed.

New Package

Package type*:
☐ ZIP
☒ PDF

Expire Date*:
☐ No expire date
☒ Expire by

Matter History Items*:

<input type="checkbox"/>	TYPE	REF NUMBER	CLIENT NO	MATTER NO	DETAILS	CREATED DATE	CREATED BY
<input type="checkbox"/>		49518	0000001	1	This is the des...	16/04/2020 18:06:54	dan
<input type="checkbox"/>		49514	0000001	1	Outlook import...	16/04/2020 17:01:38	dan
<input type="checkbox"/>		49513	0000001	1	This is the des...	16/04/2020 16:58:11	dan
<input type="checkbox"/>		49512	0000001	1	Outlook import...	16/04/2020 16:58:10	dan
<input type="checkbox"/>		48419	0000001	1	Renamed emai...	27/03/2020 08:51:53	mitzi
<input type="checkbox"/>		46678	0000001	1	This is the des...	28/01/2020 08:15:14	mitzi
<input type="checkbox"/>		46190	0000001	1	_Address Line...	16/01/2020 08:40:22	mitzi

Page 2 of 2 | Show 20 per page | Showing 21 - 27 of 27

Save Cancel

Click Save when you are ready to create your package. To email the package link to someone, right click it in the packages section in the matter history.

New Package

Package type*:
 ZIP ☐
 PDF ☒

Expire Date*:
 No expire date ☐
 Expire by ☒ 30/09/2020

Matter History Items*:

<input type="checkbox"/>	TYPE	REF NUMBER	CLIENT NO	MATTER NO	DETAILS	CREATED DATE	CREATED BY
<input checked="" type="checkbox"/>	PDF	49518	0000001	1	This is the des...	16/04/2020 18:06:54	dan
<input type="checkbox"/>	PDF	49514	0000001	1	Outlook import...	16/04/2020 17:01:38	dan
<input checked="" type="checkbox"/>	PDF	49513	0000001	1	This is the des...	16/04/2020 16:58:11	dan
<input checked="" type="checkbox"/>	PDF	49512	0000001	1	Outlook import...	16/04/2020 16:58:10	dan
<input checked="" type="checkbox"/>	PDF	48419	0000001	1	Renamed emai...	27/03/2020 08:51:53	mitzi
<input type="checkbox"/>	PDF	46678	0000001	1	This is the des...	28/01/2020 08:15:14	mitzi
<input type="checkbox"/>	PDF	46190	0000001	1	_Address Line...	16/01/2020 08:40:22	mitzi

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Save Cancel

You are also able to prefix a package with the file reference numbers by toggling this switch. The downloaded zip package renames the files by adding their Matter History Ref Number to the beginning of each file name.

New Package

Package type*:
 ZIP ☒
 PDF ☐

Expire Date*:
 No expire date ☒
 Expire by ☐

Prefix package reference numbers:
 True ☒
 False ☐

From here, you can choose to download the package to send as an attachment in an Outlook email, or email it using the inbuilt email facility.

Recycle Bin

My Workspace

- Checked Out Items
- In Tray Items
- Favorite Items
- Recent Items
- Subscribed Items
- Deal Room
- Case Bundles
- Packages**

Matter History

- 0__Adelini
- 0_Adelini

TYPE	CLIENT NO	CLIENT SURNAME	MATTER NO
PDF	0000001		

New

Send E-mail

Edit

Delete

Preview

Download

View Details

View Security

Add Retention Policy

Change Owner

Refresh