

Osprey Approach: Create a Package of files (Browser)

This help guide was last updated on
Dec 22nd, 2022

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: Adrienne Melba

Chart Type: Line Bar

Show Labels:

Target: 16

Period	Completed Matters
1	16
2	16
3	16
4	16
5	16

Select Case Management and in the Workspace click Packages

🏠 🔄 🔍

📄 New ✉ Send E-mail ✂ Edit 🗑 Delete 📄 Download 🔄

TYPE	CLIENT NO	CLIENT SURNAME	MATTER NO
🔍	🔍	🔍	🔍

- 🗑 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

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
<div style="display: flex; align-items: center;"> v Today (1) </div>			
<div style="display: flex; align-items: center;"> 📄 4d9704f9-07f4-48f1-878f-d334f2c56fb3 </div>	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 checked="" type="checkbox"/>	TYPE	REF NUMBER	CLIENT NO	MATTER NO	DETAILS	CREATED DATE	CREATED BY
<input checked="" type="checkbox"/>		57315	0000001	1	Outlook import...	14/07/2020 10:26:10	dan
<input checked="" type="checkbox"/>		57314	0000001	1	Outlook import...	14/07/2020 10:23:31	dan
<input checked="" type="checkbox"/>		55625	0000001	1	This is a PDF t...	17/06/2020 13:17:25	dragos
<input checked="" type="checkbox"/>		55624	0000001	1	This is a test d...	17/06/2020 13:14:10	dragos
<input checked="" type="checkbox"/>		54888	0000001	1	FW Adapt 202...	28/05/2020 08:45:01	dragos
<input checked="" type="checkbox"/>		54883	0000001	1	Outlook import...	28/05/2020 08:42:29	dragos
<input checked="" type="checkbox"/>		54880	0000001	1	rich content m...	28/05/2020 08:32:42	dragos
<input checked="" type="checkbox"/>		54879	0000001	1	Simple msg	28/05/2020 08:29:58	dragos
<input checked="" type="checkbox"/>		54878	0000001	1	Rich html cont...	28/05/2020 08:23:16	dragos


Page 1 of 2 | Goto next page | per page | Showing 1 - 20 of 27

Save Cancel








To choose the files you want to include in the package, select them by holding down the CTRL key on your keyboard, and clicking the small square box on the left hand side of the screen:

New Package

Package type*:
 ZIP
 PDF

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

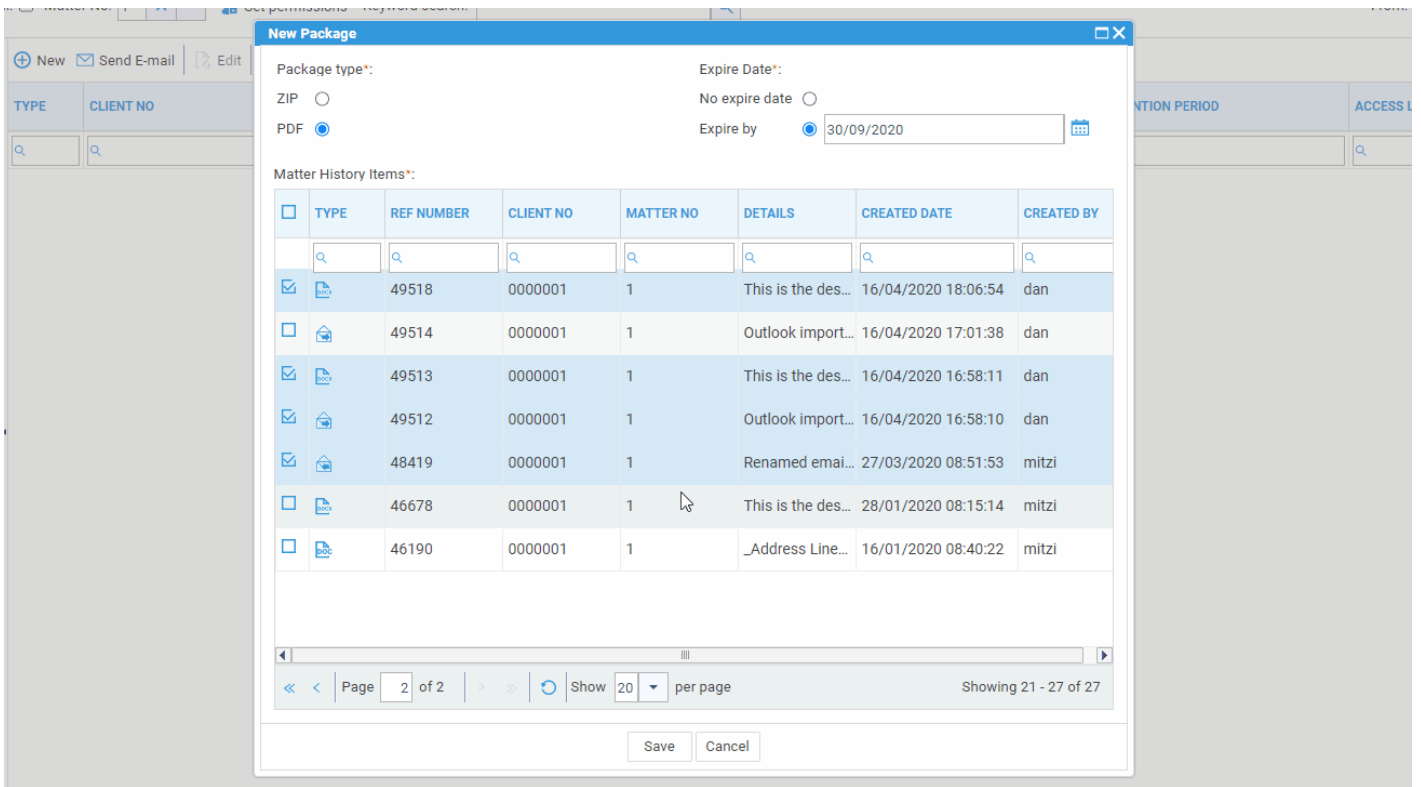
Matter History Items*:

<input type="checkbox"/>	TYPE	REF NUMBER	CLIENT NO	MATTER NO	DETAILS	CREATED DATE	CREATED BY
<input 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.



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.

