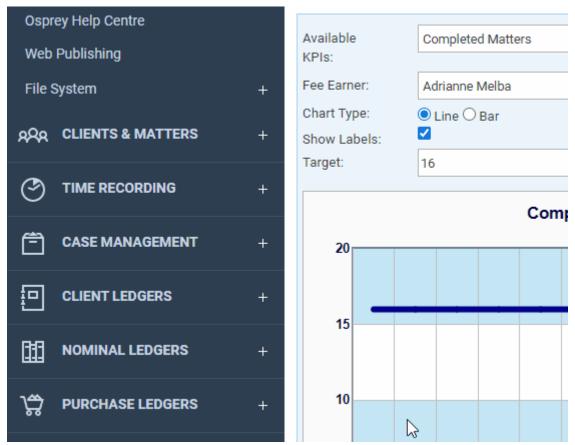
Osprey Approach: Create a Package of files (Browser)

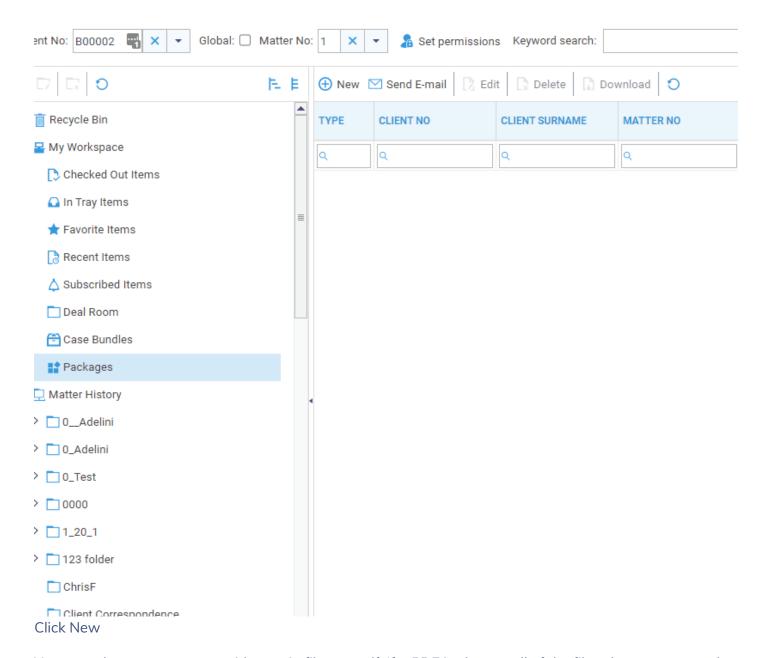
This help guide was last updated on Jan 19th, 2024

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





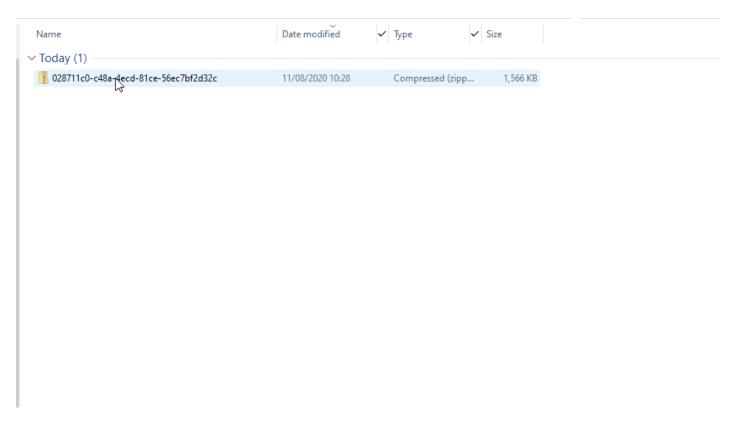
Select Case Management and in the Workspace click Packages



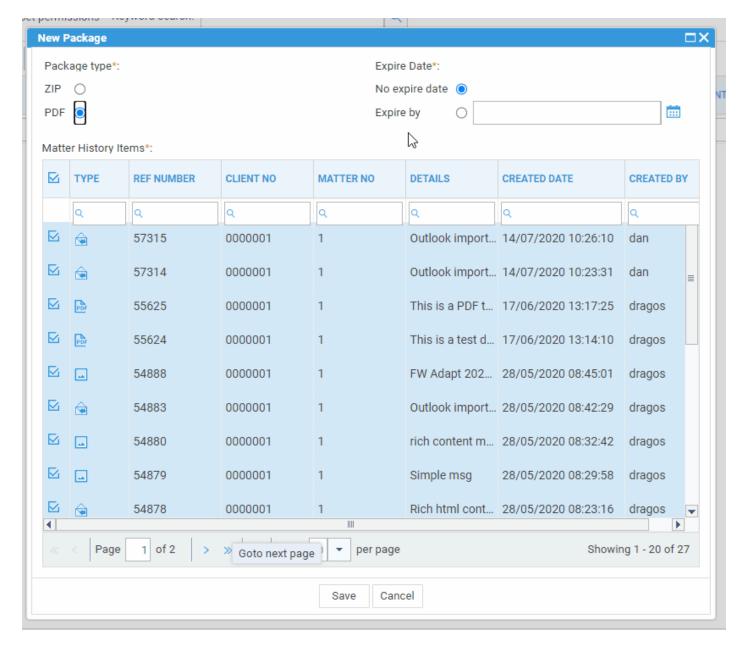
You may choose to generate either a zip file or a pdf. If a PDF is chosen, all of the files chosen are saved to one PDF:



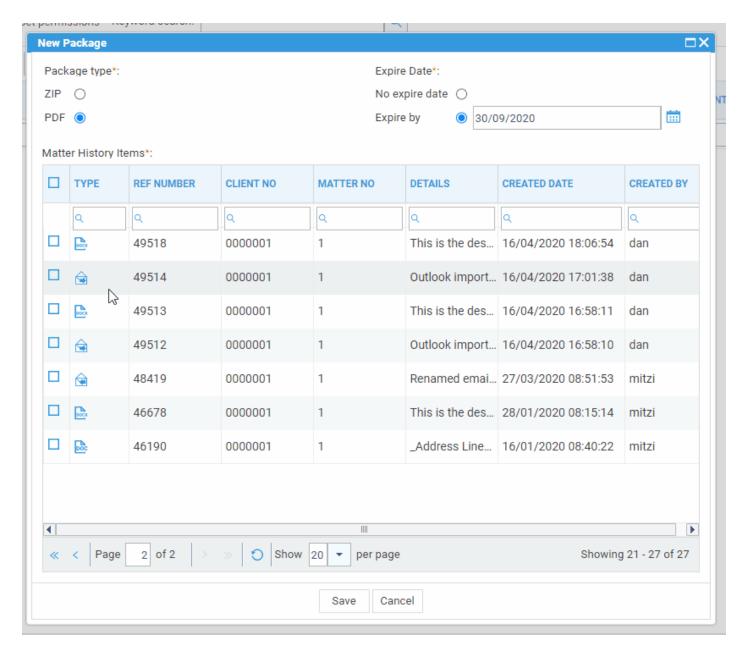
If a ZIP file is chosen, all of the files are zipped up into a zip file which will extract to give the files in the same format as they are stored in the matter history.



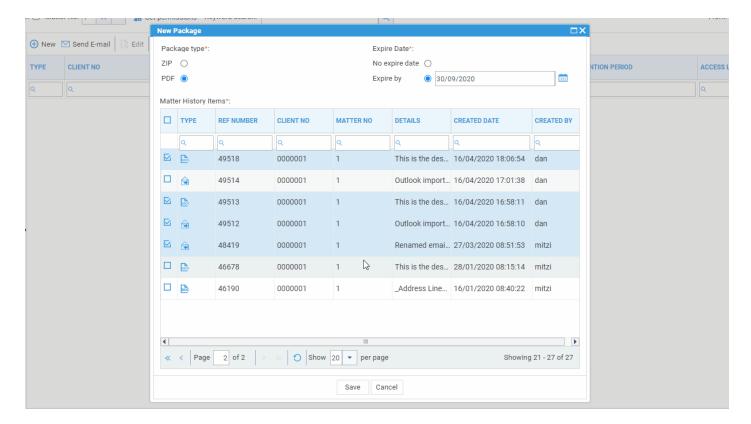
You can also choose whether the package will expire to prevent your clients from opening them after a certain date has passed.



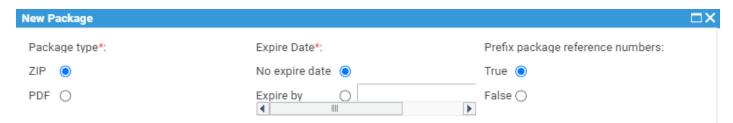
To choose the files you want to include in the package, select them by holding down the CTRL key on your keyboard, and clicking the small square box on the left hand side of the screen:



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.



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.



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.

