

Osprey Approach: Creating Case Bundles (Browser)

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The latest version is always online at
<https://support.ospreyapproach.com/?p=53149>

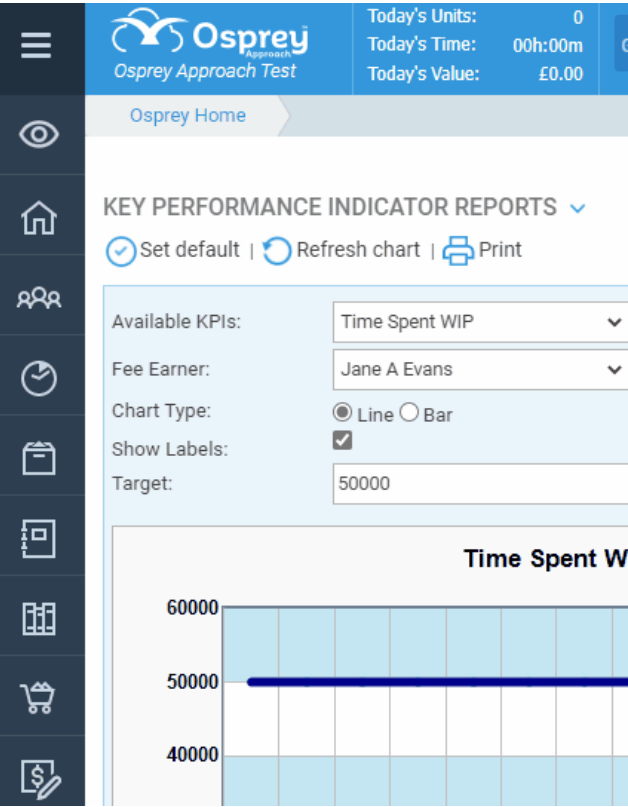
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Case bundles can be quickly and easily created within Osprey.

Creating a new Case Bundle

To start creating a new bundle Navigate to Case Management then select Case Bundles found under the My Workspace Heading.



Now to start creating the bundle click on New. You may then add the details for your new bundle.

Bundle Name

Hearing Name & Date

Court Name

Case Number

Applicants

Respondents

Click Add once complete. This will then create the base of the bundle and you will see a line added to the main grid.

The following columns have been added:




- Bundle Name
- Hearing Name and Date
- Court Name
- Parties - displays the Applicants and Respondents

Modify this by right-clicking on it and selecting Edit.

CLIENT NO	MATTER NO	BUNDLE NAME	HEARING NAME AND DATE	COURT NAME	PARTIES	CREATED DATE	CREATED BY
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
WO0009	1	RW	Hearing 22/02/2023	Hereford	Rich / Dan	22/02/2023 15:06:51	richard

Click on to the newly created line. to open the side panel to the right hand side of the screen. If you do not see the side panel it is minimised. Locate the arrow and hold down the mouse button to expand this panel. Now click on Bundle Items.

This view can be customised to show or hide columns, Hover over a column heading and a small arrow will appear, click onto the arrow to reveal a menu, click on Columns to reveal the list of available columns, place a tick next to the column that you wish to see. You can also use the column headers to sort the documents added to the folder.

 New  Download 				
CLIENT NO	MATTER NO	CREATED DATE	CREATED BY	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
EVA00003	1	15/11/2021 15:41:05	Jane	
MOU00002	1	13/12/2021 14:24:52	Jane	
STR001	1	08/06/2022 09:45:30	Jane	
EVA00003	1	22/12/2022 16:01:15	jane	

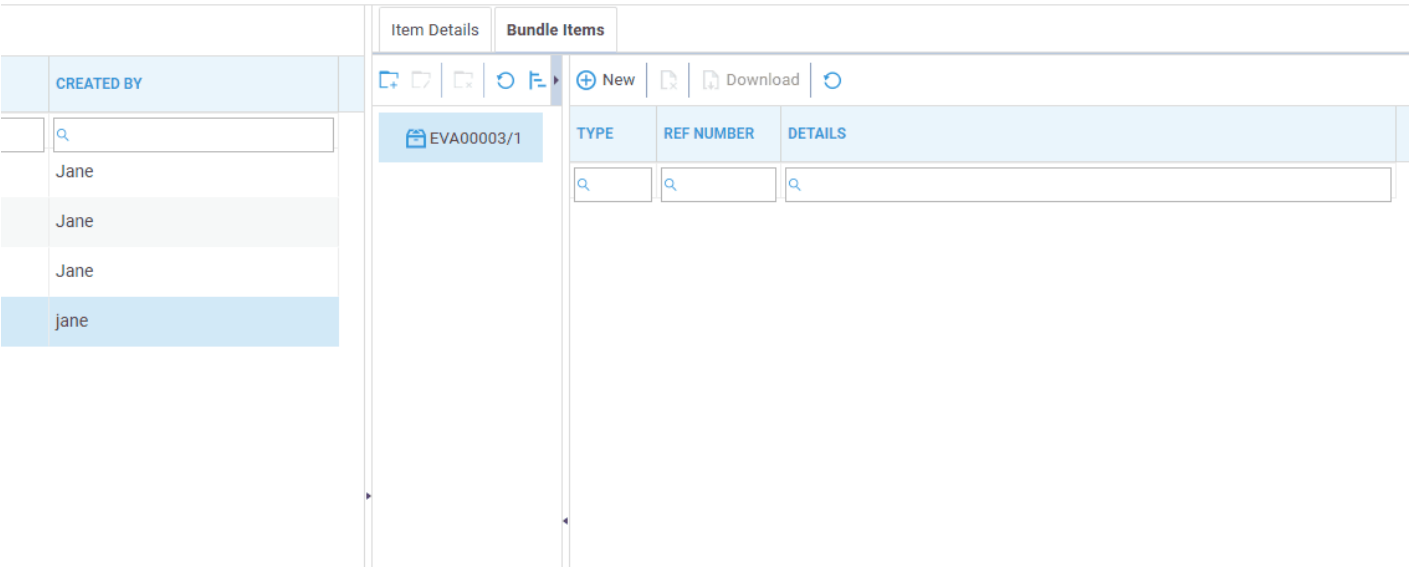
	CREATED DATE	CREATED BY
<input type="text"/>	<input type="text"/>	<input type="text"/>

You will notice that the first folder is already created for you this is called the Root Folder. This folder can only hold one word document, and would usually be the title page for the bundle. (If you have not already done so Create this page and add it to your documents.)

Creating Further Folders

You can add as many folders as you wish to your Case Bundle and you can create sub folders within these folders also.

To create a new folder click on the Folder icon at the top of the first column in the side panel. if you want to create a sub folder click on the Main folder then click the folder icon. When you click on the Folder symbol a pop up will appear prompting you to give the folder a name, fill this in and click ok. The new folder will now be created. You can also delete and rename folders using the other icons at the top of the first column.



The following columns have been added in details view:

- Processed Date
- Client Surname
- Matter Description
- Move - change the position of the items in a folder

		TYPE	REF NUMBER	CLIENT NO	MATTER NO	DETAILS	CREATED DATE	CREATED BY	PROCESSED DATE	MATTER DESC...	CLIENT SURNA...
Up	Down		95570	W00009	1	Cheque Requisiti...	08/02/2023 08:35:45	Richard	08/02/2023 08:35:45	Purchase of ...	Wood

Adding Documents to Folders

To add a document to a Folder click on the Folder to select it. Then click on New in the side panel, this will open a list of documents that can be added to the selected folder.

You can add a single document by clicking onto it and clicking ok. Or you can add multiple documents in one go by holding down the Ctrl Key and clicking on several documents then click ok.

When you select a folder now the documents will be displayed in the second column of the side panel. Ensure the documents are added in the order in which you need them to appear as this cannot be changed later, other than by using the column headers as described above.

CREATED BY

Jane

Jane

Jane

jane

EVA00003/1

A

Aa

B

C

New

Download

TYPE	REF NUMBER	DETAILS

Now you have added items to a folder there are some other options available. You can use the icons at the top of the second column in the side panel, to delete, preview or download the selected document. You can also see these option by right clicking on a document.

You can also move the items up or down using the buttons on the left hand side of each one.

Item DetailsBundle Items

MAT00001/1

Section A

Section B

New

Download

		TYPE	REF NUMBER	CLIENT NO	MATTER NO	DETAILS
Up	Down		63992	MAT00001	1	1
Up	Down		63988	MAT00001	1	det

Downloading the Bundle

Once you are happy with the content of your bundle you can use the download button (shown above) to see the Bundle as a PDF. Clicking this open up the pdf of your bundle in your PDF viewer.

Amending your Case Bundle

All the bundles you create are stored within Osprey, so you can view or amend them at any time.

Navigate to Case Management - Then select Case Bundles, as shown at the beginning of this guide.

you will see a list of all the bundles you have created within Osprey. Right clicking on a bundle will give you a sub menu where you can choose Delete, View Details or Download.

Clicking on a bundle will also reopen the side panel where you can amend or add content as described above.

Client No: Global: ☐ Matter No: Set permissions Keyword search:

New Download Refresh

CLIENT NO	MATTER NO	CREATED DATE	CREATED BY
<input type="text" value="EVA00003"/>	<input type="text" value="1"/>	<input type="text" value="15/11/2021 15:41:05"/>	<input type="text" value="Jane"/>
MOU00002	1	13/12/2021 14:24:52	Jane
STR001	1	08/06/2022 09:45:30	Jane
EVA00003	1	22/12/2022 16:01:15	jane

NewDeleteView DetailsDownloadRefresh