



Osprey Approach: Creating Case Bundles (App)

This help guide was last updated on
Dec 27th, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=29545>



Creating a Case Bundle

Within the Desktop App, ensure the relevant client and matter is loaded.

Next, click Case Bundles. To create a new bundle, click Add. Created bundles will be visible only to the user who created it.

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Initial Letters Sent - Awaiting Return of Doc

Case Bundles - D00058/2 (Drummond)

Change Client/Matter Email Co

+ Add

NAME	HEARING NAME AND DATE	COURT
Bundle 1	HND 04	CN

A pop-up window will appear, asking for the User to input a Bundle name, Hearing Name & Date, Court Name and Parties. Use the plus symbols to add the Parties All fields are mandatory.

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Today's Units: 15

Today's Time: 01h:30m

Today's Value: £300.00

Global search

00:00:00 /0

Initial Letters Sent - Awaiting Return of Docs

Case Bundles - D00058/2 (Drummond Samuel/Purchase of 14 Powdermill Lane, TW11 8PN) FE: DD WT: FW_RCP

Change Client/Matter

Email

Conflict of Interest

+ Add

NAME	HEARING NAME AND DATE	COURT NAME	PARTIES
Bundle 1	HND 04	CN 04	S Dr

Add Bundle

Bundle Name

Hearing Name & Date

Court Name

Case Number

Applicants

+ Add

Respondents

+ Add

Add

Cancel

I'm Posit, your virtual assistant! Please, tell me what you want to do...

When Saved, the data entered will appear within the relevant column within the Bundles screen

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Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

00:00:00 /0

Initial Letters Sent - Awaiting Return of Docs

Case Bundles - D00058/2 (Drummond Samuel/Purchase of 14 Powdermill Lane, TW11 8PN) FE: DD WT: FW_RCP

Change Client/Matter

Email

Conflict of Interest

Enable Client Web Access

Send SMS

Document Production

+ Add

NAME	HEARING NAME AND DATE	COURT NAME	PARTIES	CREATED DATE	EDIT
Bundle 1	HND 04	CN 04	S Drummond / A Hiscutt	07/12/2022	

I'm Posit, your virtual assistant! Please, tell me what you want to do...

Only the bundles created for the loaded client will be visible.

Osprey Approach (3.0.0)

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

00:00:00 / 0

Initial Letters Sent - Awaiting Return of Docs

Case Bundles - D00058/2 (Drummond Samuel/Purchase of 14 Powdermill Lane, TW11 8PN) FE: DD WT: FW_RCP

Change Client/Matter Email Conflict of Interest Enable Client Web Access Send SMS Document Production

+ Add

NAME	HEARING NAME AND DATE	COURT NAME	PARTIES	CREATED DATE	EDIT
Bundle 1	HND 04	CN 04	S Drummond / A Hiscutt	07/12/2022	

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I'm Posit, your virtual assistant! Please, tell me what you want to do...

Adding Folders

To start adding content to our bundle, we will need to create folders to place our contents in. Only one document can be added to the Root Folder, which will be used as the title page. Click the Add icon as shown below.

Osprey Approach (3.0.0)

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

00:00:00 / 0

Initial Letters Sent - Awaiting Return of Docs

Case Bundle Details

Client No: D00058 (Drummond Samuel) Matter No: 2 (Purchase of 14 Powdermill Lane, TW11 8PN) Created By: Steve Created Date: 07/12/2022 11:19:02

Download bundle

Search...

+ [edit] [delete] [refresh] [list] [add] [download]

	MOVE	TYPE	REF NUMBER	CLIENT NO	MATTER NO	CLIENT SURNAME	MATTER DESCRIPTION	DETAILS	PROCESSED DATE	CREATED DATE	CREATED BY
▼ D00058/2											
1. Case Worksheet											
2. Court Documents											
3. Opening Statements											
4. Evidence											
5. Witness Statements											
6. Closing Statements											

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Packages
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I'm Posit, your virtual assistant! Please, tell me what you want to do...

Provide the folder a name and a letter. These will be visible through the Index page, allowing users to categorise or group specific documents and correspondence.

Osprey Approach (1.0.0)

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

00:00:00 /0

Initial Letters Sent - Awaiting Return of Docs

Case Bundle Details

Client No: D00058 (Drummond Samuel) Matter No: 2 (Purchase of 14 Powdermill Lane, TW11 8PN) Created By: Steve Created Date: 07/12/2022 11:19:02

Download bundle

Search...

+ [D00058/2] MOVE TYPE REF NUMBER CLIENT NO MATTER NO CLIENT SURNAME MATTER DESCRIPTION DETAILS PROCESSED DATE CREATED DATE CREATED BY

- 1. Case Worksheet
- 2. Court Documents
- 3. Opening Statements
- 4. Evidence
- 5. Witness Statements
- 6. Closing Statements

Add New Section

Section Letter

Section Name

Save Cancel

I'm Posit, your virtual assistant! Please, tell me what you want to do...

All created folders can be viewed for the selected bundle within the left hand panel.

Osprey Approach (3.0.0)

Today's Units: 15
Today's Time: 01h:30m
Today's Value: £300.00

Global search

00:00:00 /0

Initial Letters Sent - Awaiting Return of Docs

Case Bundle Details

Client No: D00058 (Drummond Samuel) Matter No: 2 (Purchase of 14 Powdermill Lane, TW11 8PN) Created By: Steve Created Date: 07/12/2022 11:19:02

Download bundle

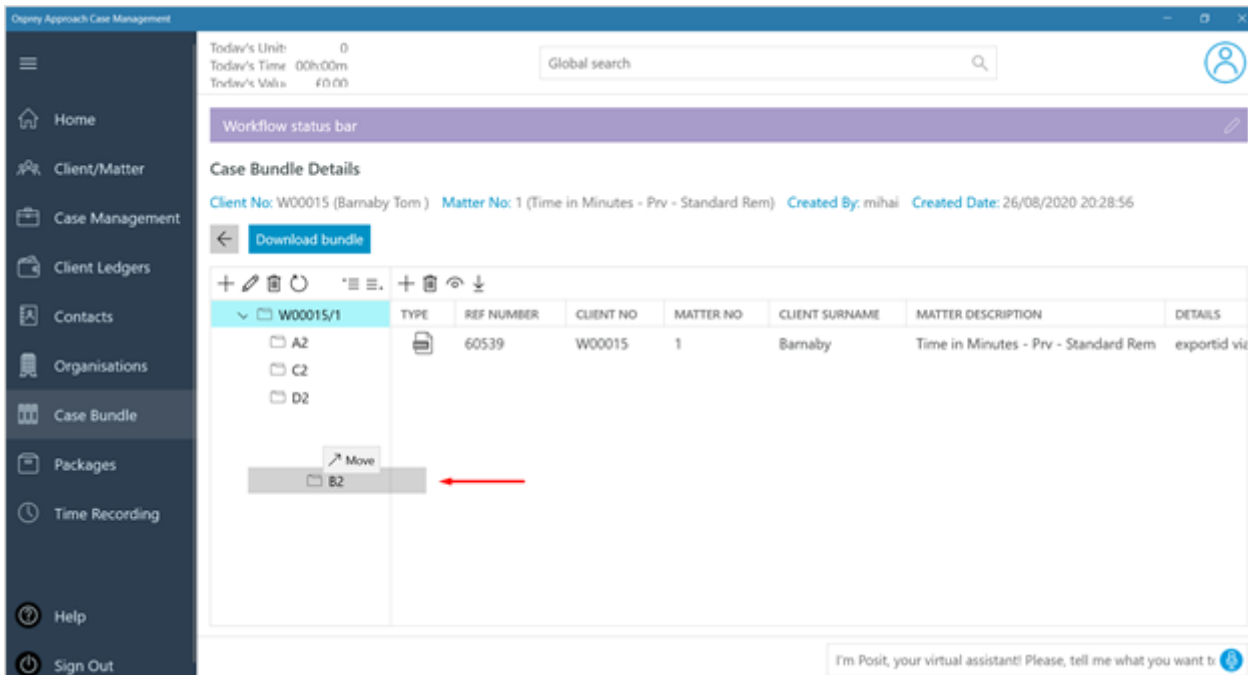
Search...

+ [D00058/2] MOVE TYPE REF NUMBER CLIENT NO MATTER NO CLIENT SURNAME MATTER DESCRIPTION DETAILS PROCESSED DATE CREATED DATE CRE/

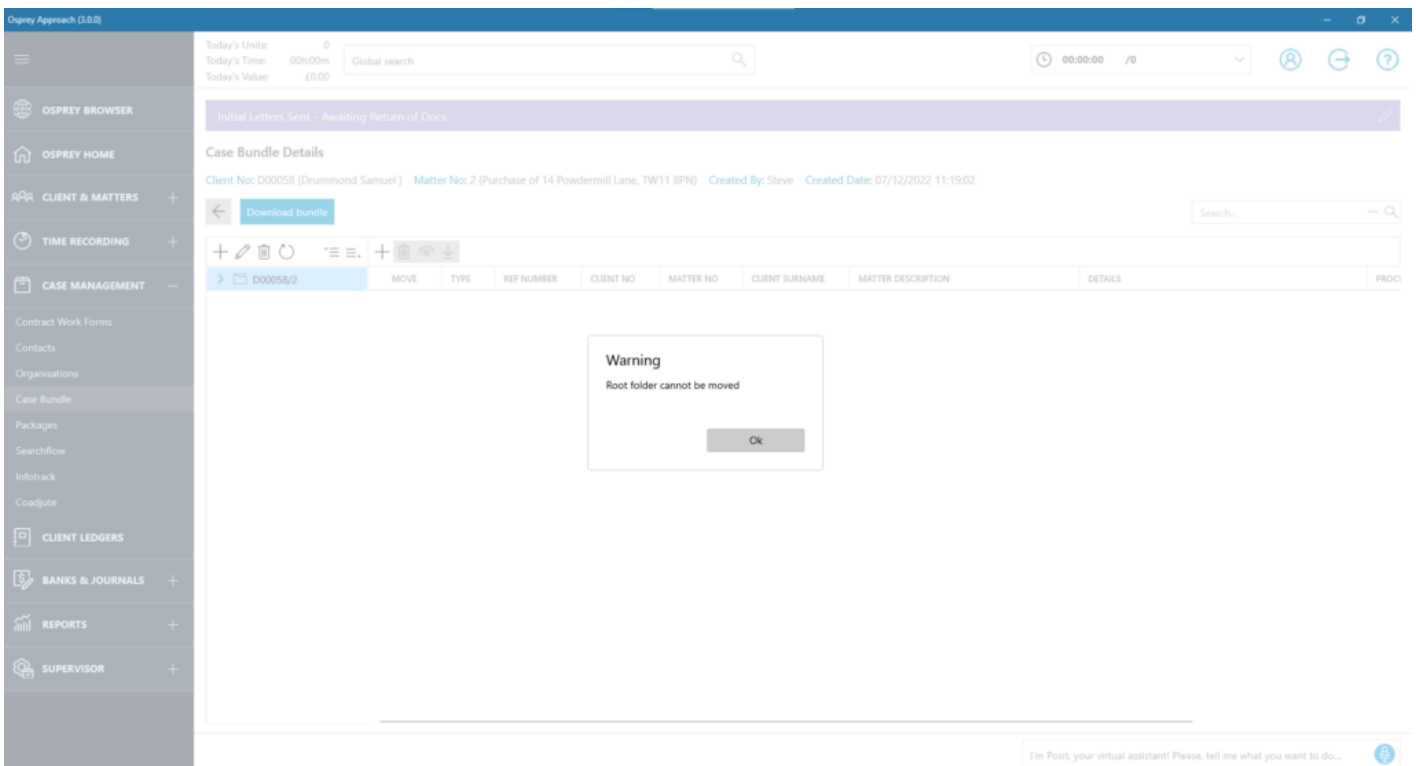
- 1. Case Worksheet
- 2. Court Documents
- 3. Opening Statements
- 4. Evidence
- 5. Witness Statements
- 6. Closing Statements

I'm Posit, your virtual assistant! Please, tell me what you want to do...

Users can rearrange folders by left-click and dragging to the new location. Folders can be rearranged only within the root folder, or rearranged within a sub-folder



If users attempt to move a folder from the root folder to inside another folder, or vice versa, an error will appear.



Adding Documents to a Case Bundle

To add documents, select a folder, left-click to view the contents. To add a document, click the Add icon

Osprey Approach (3.0.0)

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

00:00:00 / 0

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Initial Letters Sent - Awaiting Return of Docs

Case Bundle Details

Client No: D00058 (Drummond Samuel) Matter No: 2 (Purchase of 14 Powdermill Lane, TW11 8PN) Created By: Steve Created Date: 07/12/2022 11:19:02

Download bundle

Search...

+

	MOVE	TYPE	REF NUMBER	CLIENT NO	MATTER NO	CLIENT SURNAME	MATTER DESCRIPTION	DETAILS	PROC
1. Case Worksheet	▼ ▲		37041	D00058	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	Sent e-mail (Subject: Correspondence from EASTNOR...	16/11
2. Court Documents	▼ ▲		37042	D00058	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	Letter.docx.docx	16/11
3. Opening Statements	▼ ▲		37040	D00058	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	bright doc save	16/11
4. Evidence	▼ ▲								
5. Witness Statements									
6. Closing Statements									

I'm Posit, your virtual assistant! Please, tell me what you want to do...

Select the document(s) to be added.

Hold down the Control key whilst selecting to add multiple documents, then click Add. When adding, users will be prompted to add a Processed Date.

Osprey Approach (3.0.0)

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

00:00:00 / 0

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Initial Letters Sent - Awaiting Return of Docs

Add Bundle Items

Add

Search...

TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	DETAILS	CREATED DATE
	37041	D00058	Drummond	2	Sent e-mail (Subject: Correspondence from EASTNOR...	16/12/2022
	37042	D00058	Drummond	2	Letter.docx.docx	16/12/2022
	37040	D00058	Drummond	2	bright doc save	16/12/2022
	37004	D00058	Drummond	2	Cheque Requisition Slip - Fee Earner Bill	08/12/2022
	37003	D00058	Drummond	2	Bill for Services	08/12/2022
	37002	D00058	Drummond	2	Preparing documents for meeting.	08/12/2022
	37001	D00058	Drummond	2	Email sent to client to confirm meeting location &...	08/12/2022
	37000	D00058	Drummond	2	Meeting at client's home.	07/12/2022
	36999	D00058	Drummond	2	Sent e-mail (Subject: Email Regarding Case: Purch...	07/12/2022
	36998	D00058	Drummond	2	Case Worksheet	07/12/2022
	22483	D00058	Drummond	2	invoice	28/04/2021
	22482	D00058	Drummond	2	Cheque Requisition Slip - Fee Earner Bill	28/04/2021
	22268	D00058	Drummond	2	Sent e-mail (Subject: Email Regarding Case : Purc...	16/04/2021
	22267	D00058	Drummond	2	Sent e-mail (Subject: Email Regarding Case : Purc...	16/04/2021
	10988	D00058	Drummond	2	Invoice	05/11/2020

I'm Posit, your virtual assistant! Please, tell me what you want to do...

Processed Dates

A Processed Date column is shown by default within the Bundle Details page.

Osprey Approach (1.0.0)

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

00:00:00 /0

Initial Letters Sent - Awaiting Return of Docs

Case Bundle Details

Client No: D00058 (Drummond Samuel) Matter No: 2 (Purchase of 14 Powdermill Lane, TW11 8PN) Created By: Steve Created Date: 07/12/2022 11:19:02

Download bundle

Search...

	I NO	MATTER NO	CLIENT SURNAME	MATTER DESCRIPTION	DETAILS	PROCESSED DATE	CREATED DATE	CREATED BY
1. Case Worksheet	58	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	Sent e-mail (Subject: Correspondence from EASTNOR...	16/12/2022	16/12/2022	steve
2. Court Documents	58	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	Letter.docx.docx	16/12/2022	16/12/2022	steve
3. Opening Statements	58	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	bright doc save	16/12/2022	16/12/2022	steve
4. Evidence								
5. Witness Statements								
6. Closing Statements								

I'm Posit, your virtual assistant! Please, tell me what you want to do...

To update the Processed Date, right click on any of the documents, and select Change Processed Date. Documents will always appear from Oldest to Newest when downloaded.

Osprey Approach (1.0.0)

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

00:00:00 /0

Initial Letters Sent - Awaiting Return of Docs

Case Bundle Details

Client No: D00058 (Drummond Samuel) Matter No: 2 (Purchase of 14 Powdermill Lane, TW11 8PN) Created By: Steve Created Date: 07/12/2022 11:19:02

Download bundle

Search...

	MOVE	TYPE	REF NUMBER	CLIENT NO	MATTER NO	CLIENT SURNAME	MATTER DESCRIPTION	DETAILS	PROD
1. Case Worksheet	▼ ▲	📄	37041	D00058	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	Sent e-mail (Subject: Correspondence from EASTNOR...	16/1/...
2. Court Documents	▼ ▲	📄	37042	D00058	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	Letter.docx.docx	16/1/...
3. Opening Statements	▼ ▲	📄	37040	D00058	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	bright doc save	16/1/...
4. Evidence									
5. Witness Statements									
6. Closing Statements									

Preview
Download
Remove
Change Processed Date

I'm Posit, your virtual assistant! Please, tell me what you want to do...

The Processed date assigned to documents can also be viewed from the Documents area within Case Management.

Opkey Approach Case Management

Today's Unit: 0
Today's Time: 00h00m
Today's Value: £0.00

Workflow status bar

Case Management - W00015/1 (Barnaby TB Tom/Time in Minutes - Prv - Standard Rem) FE: MH GRD WT: MH_WT1

[Change Client/Matter](#) [Email](#) [Conflict of Interest](#) [Enable Client Web Access](#) [Send SMS](#)

KEYDATES DOCUMENTS WORKFLOWS

+ Add Document + Add Note Request Signature (DocuSign)

In Tray Items
Signature Requests
Matter History
0_Adelini
0_Adelini
0_Test
0000
1_20_1
123 folder
14_08_regression
24_07Regression
case bundle 1

Column chooser - Opkey Approach Case Management

Type
Ref number
Client no
Client surname
Matter No
Matter Description
Retention Period
Processed Date
Created Date
Details
Created By
Custom Type
Last Modified Date
Last Modified By
Size

Save Cancel

Processed Date

Search...

MATTER NO	MATTER DESCRIPTION	RETEN
	Time in Minutes - Prv - Standard Rem	
	Time in Minutes - Prv - Standard Rem	
	Time in Minutes - Prv - Standard Rem	
	Time in Minutes - Prv - Standard Rem	
	Time in Minutes - Prv - Standard Rem	
	Time in Minutes - Prv - Standard Rem	
	Time in Minutes - Prv - Standard Rem	
	Time in Minutes - Prv - Standard Rem	
	Time in Minutes - Prv - Standard Rem	
	Time in Minutes - Prv - Standard Rem	
	Time in Minutes - Prv - Standard Rem	

I'm Posit, your virtual assistant! Please, tell me what you want to

Opkey Approach Case Management

Today's Unit: 0
Today's Time: 00h00m
Today's Value: £0.00

Global search

Workflow status bar

Case Management - W00015/1 (Barnaby TB Tom/Time in Minutes - Prv - Standard Rem) FE: MH GRD WT: MH_WT1

[Change Client/Matter](#) [Email](#) [Conflict of Interest](#) [Enable Client Web Access](#) [Send SMS](#)

KEYDATES DOCUMENTS WORKFLOWS

+ Add Document + Add Note Request Signature (DocuSign)

In Tray Items
Signature Requests
Matter History
0_Adelini
0_Adelini
0_Test
0000
1_20_1
123 folder
14_08_regression
24_07Regression
case bundle 1

TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	PROCESSED DATE	DETAILS
	60585	W00015	Barnaby	1	28/08/2020	DESCRIPTION - HG 2139
	60539	W00015	Barnaby	1	28/08/2020	exportid via addin
	60377	W00015	Barnaby	1	28/08/2020	Negotiation Meeting
	60376	W00015	Barnaby	1	04/09/2020	Lexis comparison 1 CM #
	60363	W00015	Barnaby	1		Lexis comparison 1 Cli Le
	60350	W00015	Barnaby	1	02/09/2020	Lexis comparison 1 OA
	60342	W00015	Barnaby	1		lcn208_WT1_hourly
	60341	W00015	Barnaby	1	02/09/2020	lcn227_WT1_hourly
	60340	W00015	Barnaby	1		lcn227_WT1_hourly

I'm Posit, your virtual assistant! Please, tell me what you want to

Once a processed date has been added to a document, it cannot be removed, but it can be amended.

To amend within Case Bundles, locate the document and right-click. Select Change Processed Date

Osprey Approach (1.0.0)

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

00:00:00 / 0

Initial Letters Sent - Awaiting Return of Docs

Case Bundle Details

Client No: D00058 (Drummond Samuel) Matter No: 2 (Purchase of 14 Powdermill Lane, TW11 8PN) Created By: Steve Created Date: 07/12/2022 11:19:02

Download bundle

Search...

MOVE	TYPE	REF NUMBER	CLIENT NO	MATTER NO	CLIENT SURNAME	MATTER DESCRIPTION	DETAILS	PROO
1. Case Worksheet	▼ ▲	37041	D00058	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	Sent e-mail (Subject: Correspondence from EASTNOR...	16/1;
2. Court Documents	▼ ▲	37042	D00058	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	Letter.docx.docx	16/1;
3. Opening Statements	▼ ▲	37040	D00058	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	bright doc save	16/1;
4. Evidence	▼ ▲							
5. Witness Statements	▼ ▲							
6. Closing Statements	▼ ▲							

Preview
Download
Remove
Change Processed Date

I'm Posit, your virtual assistant! Please, tell me what you want to do...

Click the icon to show a pop-up calendar view to help select the required date.

Osprey Approach Case Management

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

Workflow status bar

Case Bundle Details

Client No: W00015 (Barnaby Tom) Matter No: 1 (Time in Minutes - Priv - Standard Rem) Created By: mihai Created Date: 26/08/2020 20:28:56

Download bundle

W00015/1

TYPE REF N

A2 603

B2

C2

D2

CLIENT SURNAME MATTER DESCRIPTION DETAILS

Barnaby Time in Minutes - Priv - Standard Rem Negotiation

Enter processed date

28/08/2020

August 2020

Su Mo Tu We Th Fr Sa

26 27 28 29 30 31 1

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

30 31 1 2 3 4 5

I'm Posit, your virtual assistant! Please, tell me what you want to do...

Moving Documents in the Case Bundle

The Documents can be moved up and down using the arrows on the left hand side of the documents.

Osprey Approach (3.0.0)

☰

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SUPERVISOR +

Today's Units: 0

Today's Time: 00h00m

Today's Value: £0.00

Global search

⌚ 00:00:00 /0

ⓘ

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Initial Letters Sent - Awaiting Return of Docs

Case Bundle Details

Client No: D00058 (Drummond Samuel)

Matter No: 2 (Purchase of 14 Powdermill Lane, TW11 8PN)

Created By: Steve

Created Date: 07/12/2022 11:19:02

Download bundle

Search...

	MOVE	TYPE	REF NUMBER	CLIENT NO	MATTER NO	CLIENT SURNAME	MATTER DESCRIPTION	DETAILS	PROC
▼ D00058/2 1. Case Worksheet 2. Court Documents 3. Opening Statements 4. Evidence 5. Witness Statements 6. Closing Statements	▼ ▲	📄 📄 📄	37041	D00058	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	Sent e-mail (Subject: Correspondence from EASTNOR...	16/1
	▼ ▲	📄	37042	D00058	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	Letter.docx.docx	16/1
	▼ ▲	📄	37040	D00058	2	Drummond	Purchase of 14 Powdermill Lane, TW11 8PN	bright doc save	16/1

I'm Post, your virtual assistant! Please, tell me what you want to do...

ⓘ

The Root Folder

The root folder allows users to place an initial document, or cover page, before the Index page when the bundle is downloaded. Only one document can be placed within the Root Folder.

If you attempt to add an additional file, or need to replace it, you will need to delete the existing document by right clicking, and selecting delete.

Capgemini Approach Case Management

Today's Unit: 0
Today's Time: 00h00m
Today's Value: £0.00

Global search

Workflow status bar

Case Bundle Details

Client No: W00015 (Barnaby Tom) Matter No: 1 (Time in Minutes - Priv - Standard Rem) Created By: mihai Created Date: 26/08/2020 20:28:56

Download bundle

Warning

You can have only one document in the root folder. If you want to replace the existing document, first delete it, and then add a new one.

Ok

NAME	MATTER DESCRIPTION	DETAILS
Time in Minutes - Priv - Standard Rem	exported via	

I'm Posit, your virtual assistant! Please, tell me what you want to

Bundle Document Settings

Customisations can be automatically applied to the Index Page, and can be set for various work types. This includes the font, font size, line spacing and title.

These settings are available via the Osprey Approach Web App, by Navigating to Supervisor > Case Management Setup > Bundle Document Settings.

The screenshot displays the 'Bundle Document Settings' page within the Osprey Approach Web App. The left sidebar features a menu with various options, including 'Standard Documents', 'Workflows', 'Tasks', 'Dossier Pages', 'Dossier Fields', 'Workflow Sections', 'Setup Conveyancer Portal', 'Import XML File', 'Adjust Workflow Dates', 'RTAPI Claim Fields Mapping', 'E-mail Templates', 'Matter History', 'Smart Actions', 'COLP/COFA', 'Searchflow Setup', 'SDLT Forms Config List', 'Dossier Actions', 'Configure Land Registry', 'Searches', 'Free2Convey', 'Bundle Document Settings' (highlighted), 'GDPR', 'User Design', and 'Report Setup'. The main content area shows the following settings:

- Work type: 1_Adelini
- Font: Comic Sans MS
- Font size: 15
- Line spacing: 10
- Title: TITLE from Bundle Document Settings

A red rectangular box highlights the settings area, and a 'Save' button is visible at the top left of the settings panel.