



Osprey Approach: Editing Matter History Details (App)

This help guide was last updated on
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The latest version is always online at
<https://support.ospreyapproach.com/?p=34848>

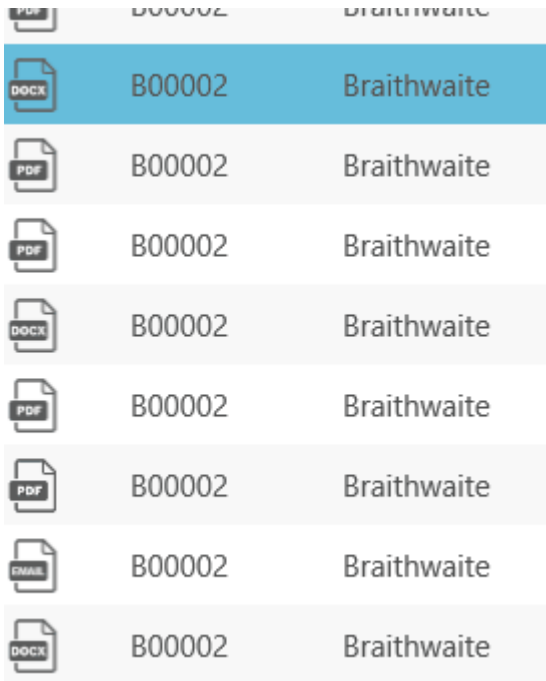
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It may be necessary to update the details of any items within the matter history of a client, such as changing the description of an email, or adding a processed date to a scanned document.

Accessing the Edit Details Screen

Right click the item and click Edit.



A screenshot of a file list interface. The list contains nine items, each with a file icon, a file ID, and a client name. The second item is highlighted in blue. The items are as follows:

File Icon	File ID	Client Name
PDF	B00002	Braithwaite
DOCX	B00002	Braithwaite
PDF	B00002	Braithwaite
PDF	B00002	Braithwaite
DOCX	B00002	Braithwaite
PDF	B00002	Braithwaite
PDF	B00002	Braithwaite
EMAIL	B00002	Braithwaite
DOCX	B00002	Braithwaite

The Details Screen

You may change the client or matter the file is saved under, assign to a matter history folder, set a custom type, change the description, set a processed date or add a retention period.

If you are typing dates in Osprey please use the format dd/mm/yyyy.

Edit Matter History Metadata - B00002/1 (Braithwaite I



Save

Client

B00002



Matter

1



Load Client

Folder

1 Folder

IHT500

IHT420

ChrisF

Custom Type

Please select...



Description

Bill Template

Processed Date

25/05/2021



Retention Period

Please select...

