

Osprey Approach: Set Up and Manage Matter History Folders (Worktype Level)

This help guide was last updated on
Aug 9th, 2024

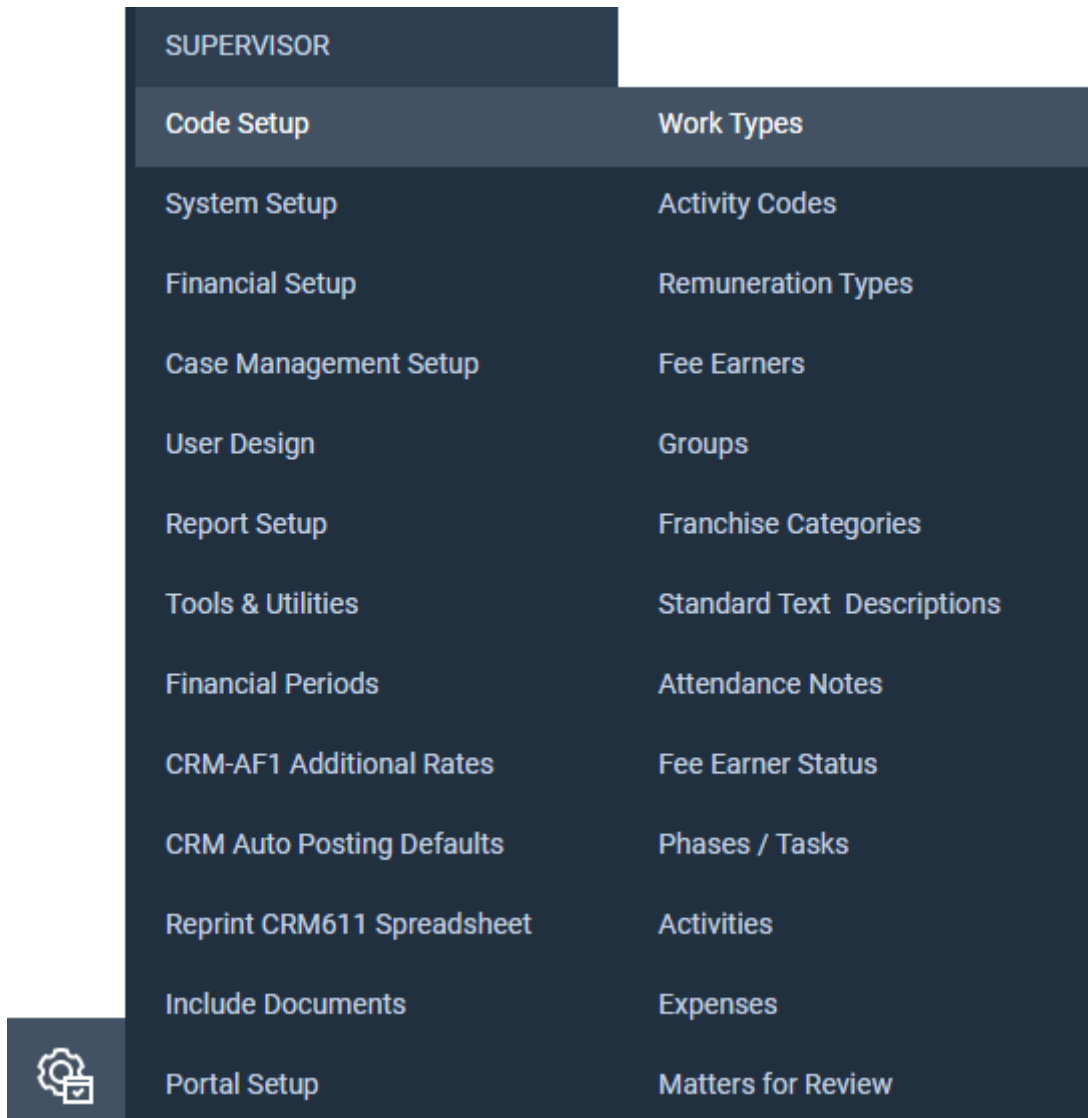
The latest version is always online at
<https://support.ospreyapproach.com/?p=68971>

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A supervisor level user can assign specific matter history folders to a particular worktype if required. This guide will take you through this process

To create a worktype specific folder for your matter history, navigate to the Supervisor area. Then select Code Setup followed by Work Types.



Now right-click on the worktype you wish to add a folder for and select Edit. Once on the edit screen, you will see a Work Type Level Folders option, as shown below.

W/T:

Work Description:

Default Workflow:

Published Description:

Published?

In Use:

Work Type Folders: **Work Type Level Folders**

Right-click on this to show a New button. Click this to open a dialogue box allowing you to name your new folder. Enter the name and click Save.

Work Type Folders: **Work Type Level Folders**

New

Folder Name:

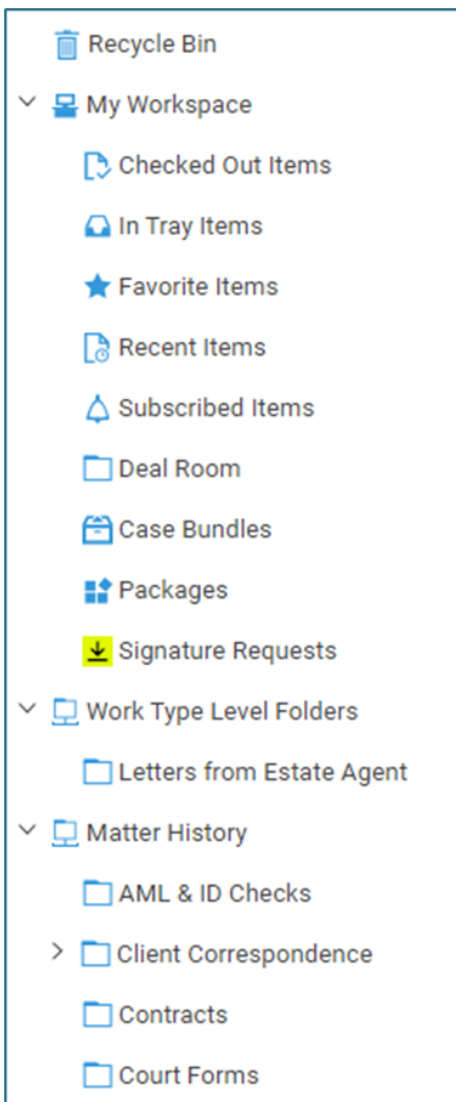
Your new folder will now appear on the Edit screen.

Work Type Folders: **Work Type Level Folders**

Letters from Estate Agent

You may right-click on the folder and rename or delete it as required. The folder will then also appear in the matter history for any files assigned to this worktype.

The worktype specific folders will appear above the global folders, as shown below.



You are able to drag and drop any folders so that they become subfolders. Any items already in the folder will also be moved.