



# Osprey Approach: Set up and Manage Matter History Folders (Browser)

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

The latest version is always online at  
<https://support.ospreyapproach.com/?p=2353>



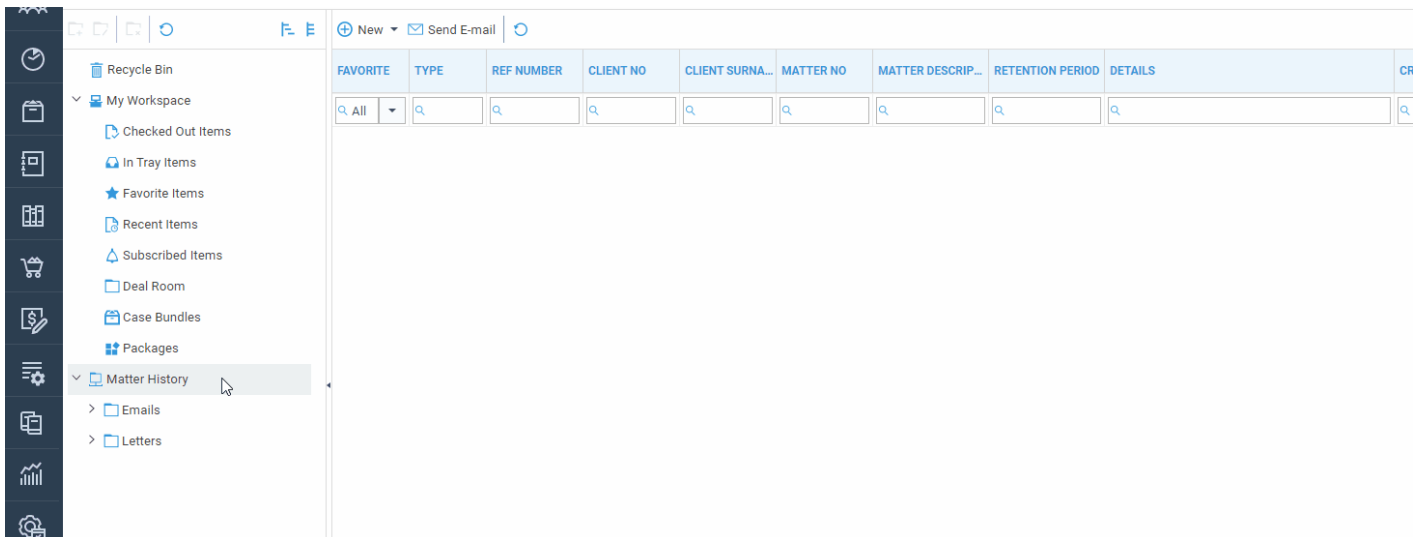
You can set up folders in the matter history which allow you to better organise your case management area.

Matter history folders can be used to organise your documents to enable to you to locate them easily. You can, for example, put all client correspondence in one folder.

Matter History folders are not specific to one matter, nor to a worktype, but are global across all clients, matters and work types.

## Add new / rename a Matter History folder

In the matter history, right click the matter history in the My Workspace section and select new. Enter the folder name and click Save. The folder can be renamed if required by right clicking and selecting Rename.



## Delete a folder

All items must be removed from a folder before the folder can be deleted.

To delete a folder, right click the folder and select delete.

Global search

N/A

Case Management

B8002/1 (Broom M A Mitzi) FE:MB WT:COMLIT Posit Testing

Client No: B8002

Global: ☐

Matter No: 1

Set permissions

Keyword search:

New

Send E-mail

FAVORITE	TYPE	REF NUMBER	CLIENT NO	CLIENT SURNA...	MATTER NO	MATTER DESCRIP...	RETENTION PERIOD	DETAILS
<div>All</div> <div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

Recycle Bin

My Workspace

Checked Out Items

In Tray Items

Favorite Items

Recent Items

Subscribed Items

Deal Room

Case Bundles

Packages

Matter History

Emails

ID Documents

Letters

To add existing items into the folder, right click the item entry in the main matter history and select Edit Details, then select the folder from the drop-down list, clicking Save to save your changes.

To move an item from one folder to another, click the folder that the item is in, right click the item and select edit details. Click the drop-down arrow to select the new folder and click Save to keep your changes.



**Your Document is ready for upload. Press 'Save' to keep your changes or 'Cancel' to discard them.**

**File Description:**

**Folder:**  [...](#)

**Custom Type:**  ▼

**Retention Period:**  ▼

**Retention Date:**  ▼

*If left blank, this will default to the Document description.*

☒ **Automatic Time Record (Untick to enter time recording manually)**

## Add new / rename a Matter History folder in the Case Management app

In the Matter History right click on the matter history folder and click new, then enter your folder name and click save.

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS

TIME RECORDING

CASE MANAGEMENT

CLIENT LEDGERS

BANKS & JOURNALS

REPORTS

SUPERVISOR

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 Management - 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](#)

KEYDATES DOCUMENTS WORKFLOWS

[+ Add Document](#)
[+ Add Note](#)
[Request Signature \(DocuSign\)](#)
☐ Global

In Tray Items

Matter History

Call Credit Reports

Client Correspondence

Contracts

Court Forms

Emails

Forms

Key Documents

My folder

Personal Injury

Proof of Identification

Quotations

Requests for Information

Scanned Documents

Signature Requests

TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	DETAILS	CREATED DATE
	37045	D00058	Drummond	2	Blank Doc.docx	19/12/2022
	36999	D00058	Drummond	2	Sent e-mail (Subject: Email Regarding Case: Purch...	07/12/2022
	10123	D00058	Drummond	2	Client Care Letter	10/08/2020
	6678	D00058	Drummond	2	Proof of Identification Request	26/07/2019

## Delete a Folder in the Case Management app

All items must be removed from a folder before the folder can be deleted.

To delete a folder, right click the folder and select delete, then click ok.

The screenshot displays the Case Management App interface. On the left is a dark sidebar with navigation options: OSPREY BROWSER, OSPREY HOME, CLIENT & MATTERS, TIME RECORDING, CASE MANAGEMENT, CLIENT LEDGERS, BANKS & JOURNALS, REPORTS, and SUPERVISOR. The main area shows the 'DOCUMENTS' tab selected. At the top, there's a header with 'Initial Letters Sent - Awaiting Return of Docs' and a purple bar with case details: 'Case Management - D00058/2 (Drummond Samuel/Purchase of 14 Powdermill Lane, TW11 8PN) FE: DD WT: FW\_RCP'. Below this are links for 'Change Client/Matter', 'Email', 'Conflict of Interest', 'Enable Client Web Access', 'Send SMS', and 'Document Production'. A sub-header shows 'KEYDATES', 'DOCUMENTS', and 'WORKFLOWS'. Under 'DOCUMENTS', there are buttons for '+ Add Document', '+ Add Note', and a 'Request Signature (DocuSign)' button. A table with columns 'TYPE', 'REF NUMBER', 'CLIENT NO', 'CLIENT SURNAME', 'MATTER NO', 'DETAILS', and 'CREATED DATE' is visible. On the left of the table, a list of folders is shown, including 'In Tray Items', 'Matter History', 'Call Credit Reports', 'Client Correspondence', 'Contracts', 'Court Forms', 'Emails', 'Forms', 'Key Documents', 'My folder', 'Personal Injury', 'Proof of Identification', 'Quotations', 'Requests for Information', 'Scanned Documents', 'Test' (highlighted in blue), and 'Signature Requests'. At the bottom right, a small footer reads 'For Best, your critical attention! Please tell me what you want to do'.

## Working with files within folders in the Case Management App

To add existing files in the matter history into a new folder right click and then click edit, then change the folder location and then click save

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS

TIME RECORDING

CASE MANAGEMENT

CLIENT LEDGERS

BANKS & JOURNALS

REPORTS

SUPERVISOR

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 Management - 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

KEYDATES

DOCUMENTS

WORKFLOWS

+ Add Document

+ Add Note

Request Signature (DocuSign)

Global

Search...

In Tray Items

Matter History

Call Credit Reports

Client Correspondence

Contracts

Court Forms

Emails

Forms

Key Documents

My folder

Personal Injury

Proof of Identification

Quotations

Requests for Information

Scanned Documents

Signature Requests

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	10123	D00058	Drummond	2	Client Care Letter	10/08/2020
	6678	D00058	Drummond	2	Proof of Identification Request	26/07/2019

Please Don't forget to save your work! Please tell me what you want to do

To remove a folder from a matter history folder right click on the item, click edit then chose to move it back to the matter history folder, then click save.

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS

TIME RECORDING

CASE MANAGEMENT

CLIENT LEDGERS

BANKS & JOURNALS

REPORTS

SUPERVISOR

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 Management - 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

KEYDATES

DOCUMENTS

WORKFLOWS

+ Add Document

+ Add Note

Request Signature (DocuSign)

Global

Search...

In Tray Items

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Contracts

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Emails

Forms

Key Documents

My folder

Personal Injury

Proof of Identification

Quotations

Requests for Information

Scanned Documents

Signature Requests

TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	DETAILS	CREATED DATE
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