



# Osprey Approach: Uploading Documents to matter history (Browser)

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The latest version is always online at  
<https://support.ospreyapproach.com/?p=54616>



You can upload documents saved on your local pc into the matter history in Osprey. This guide will take you through how to do this when using Osprey from a Browser. .

## Uploading a document

Firstly navigate to Case Management from the Main side Menu. This will open the Matter History page. In the Main pane click onto the Arrow Next to the word New, and select Upload, a pop up will open, Find the line that says Text Only, to the far right of that line there are 3 dots, click on those and File Explorer will open. Navigate to where the document you want to upload is stored. When you have located it Click onto it and then Click Open, File Explorer will close and you will see the selected file shown in the Pop up box.

The screenshot displays the Osprey Home dashboard. The left sidebar contains navigation icons. The main content area is divided into sections. The 'KEY PERFORMANCE INDICATOR REPORTS' section includes a 'Set default' button, a 'Show chart' button, and a form for selecting KPIs, Fee Earner, Chart Type, Show Labels, and Target. The 'MATTERS FOR REVIEW' section features a refresh button and a table of matters. The table has columns for F/E, CLIENT, MATTER, MATTER DESCRIPTION, REVIEW DATE, TYPE, PERIOD, and LM. The bottom section, 'YOUR KEY DATES', includes another refresh button and a table with columns for F/E, CLIENT, MATTER, CLIENT NAME, KEY DATE, TYPE, SUP F/E?, and ASSIGN F/E?.

| F/E | CLIENT   | MATTER | MATTER DESCRIPTION | REVIEW DATE ↑ | TYPE | PERIOD | LM         |
|-----|----------|--------|--------------------|---------------|------|--------|------------|
| JAE | EVA00003 | 1      | P/O 33 Devon Road  |               |      | 30     | 22/12/2021 |
| JAE | JAE00001 | 1      | p/o 27 Pare Street |               |      | 56     | 17/05/2022 |
| JAE | MOU00002 | 2      | S/O The Flat       | 14/07/2022    |      | 0      | 22/04/2022 |
| JAE | MOU00003 | 2      | Default Matter     | 20/08/2022    |      | 90     | 01/12/2021 |
| JAE | STR001   | 2      | testing disbs      | 26/08/2022    |      | 0      | 11/01/2022 |

## Saving the document

In the Pop up Box Ensure you have the correct client and matter loaded, if this is not correct you can change it by entering the Client and matter into the boxes at the top of the pop up or use the down arrow in the Client number and Matter number boxes to search for the matter you require. Now fill in the rest of the boxes as required and Click Save at the bottom of the Pop up box. your document will now be available in the matter history.

**New Matter History Item** ✕

Client No<sup>\*\*</sup>: STR001 ✕ ⌵

Global: ☐ Matter No<sup>\*\*</sup>: 3 ✕ ⌵

Custom Type: ⌵

Folder: ⌵

Text Only: ☐ File<sup>\*\*</sup>: div 1.docx ✕ ...

Processed date: 📅

Retention Period: ⌵

Retention Date: ⌵

Description

Details (required)

Web Enabled

Web Enabled: ☐

Save Cancel

Use these arrows to open a search to locate the required matter number

If known type the matter number into these boxes