

Osprey Approach: Uploading Documents to matter history (Browser)

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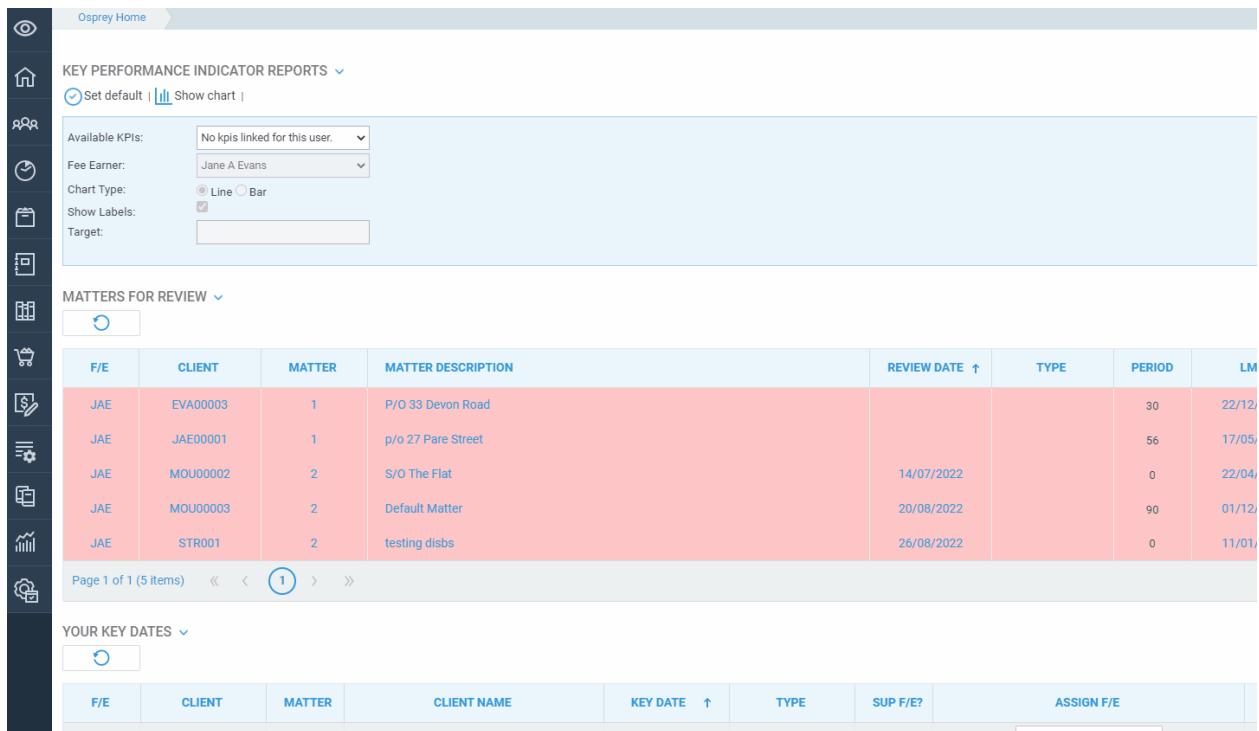
The latest version is always online at
<https://support.ospreyapproach.com/?p=54616>



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 shows the Osprey Home dashboard. The top navigation bar includes 'Osprey Home' and a sidebar with various icons. The main content area is divided into sections: 'KEY PERFORMANCE INDICATOR REPORTS' with options for 'Set default' and 'Show chart'; 'Available KPIs' with a dropdown menu; 'Fee Earner' with a dropdown menu; 'Chart Type' with radio buttons for 'Line' and 'Bar'; 'Show Labels' with a checkbox; and 'Target' with an input field. Below this is the 'MATTERS FOR REVIEW' section, which includes 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 data rows are as follows:

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

Below the table is a pagination bar showing 'Page 1 of 1 (5 items)' and navigation arrows. At the bottom of the screenshot is the 'YOUR KEY DATES' section, which includes a refresh button and a table with columns for F/E, CLIENT, MATTER, CLIENT NAME, KEY DATE ↑, TYPE, SUP F/E?, and ASSIGN F/E.

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 [X]

Client No**: STR001 [X]

Global: Matter No**: 3 [X] [v]

Custom Type: [v]

Folder: [v]

Text Only: File**: div 1.docx [X] ...

Processed date: [calendar icon]

Retention Period: [v]

Retention Date: [v]

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