



Osprey Approach: Uploading Documents to Matter History

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



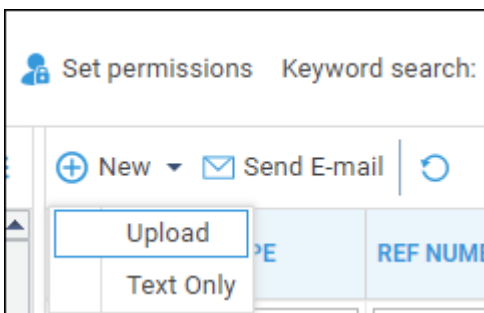
You can upload documents saved on your local PC into the matter history in Osprey. This guide will take you through how to do this when using Osprey

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,

New Matter History Item
☐ ✕

Client No**: ✕ ▾

Global: Matter No**: ✕ ▾

Custom Type: ▾

Folder: ▾

Text Only: File**: ...

Processed date: 📅 HH: ▾ MM: ▾ SS: ▾

Retention Period: ▾

Retention Date: ▾

Description

Details (required)

Web Enabled

Web Enabled:

🕒 00:00

request (0)

	CREATE
Choose file to upload	
neque Requi...	Jane
	jane
	jane
.csv	jane
VAT Journ...	jane
	jane
	jane
.csv	jane
	jane
s	jane
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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.

Saving the document

In the Pop up Box Ensure you have the correct client and matter loaded. If this is not correct, change it by entering the client and matter at the top of the pop-up. Alternatively 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.

Click Save at the bottom of the Pop up box. your document will now be available in the matter history.

The image shows a software dialog box titled "New Matter History Item". It contains several input fields and controls:

- Client No**:** A text box containing "STR001" with a search icon (magnifying glass) and a close icon (X).
- Global:** A checkbox that is unchecked.
- Matter No**:** A text box containing "3" with a search icon (magnifying glass) and a dropdown arrow.
- Custom Type:** A dropdown menu.
- Folder:** A text box.
- Text Only:** A checkbox that is unchecked.
- File**:** A text box containing "div 1.docx" with a search icon (magnifying glass) and a browse icon (...).
- Processed date:** A date picker field.
- Retention Period:** A dropdown menu.
- Retention Date:** A dropdown menu.
- Description:** A section header above a large text area labeled "Details (required)".
- Web Enabled:** A section header above a checkbox that is unchecked.
- Buttons:** "Save" and "Cancel" buttons at the bottom. The "Save" button is highlighted with a red rectangle.

Red arrows point from the following text to the search icons in the "Client No**" and "Matter No**" fields:

- "Use these arrows to open a search to locate the required matter number" (points to both search icons).
- "If known type the matter number into these boxes" (points to the text boxes for "Client No**" and "Matter No**").