

Osprey Approach: Uploading Documents to matter history (APP)

This help guide was last updated on
Feb 1st, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=54603>



In Osprey 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 the Osprey Case Management App.

Uploading a document

Firstly navigate to Case Management from the Main side Menu. This will open the Matter History page. You will see in blue writing in the main pane, + Add Document, if you now click onto that 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, this will open the save screen in Osprey

The screenshot shows the Osprey Case Management App interface. On the left is a dark sidebar menu with icons and labels for various functions: OSPREY BROWSER, OSPREY HOME, CLIENT & MATTERS, TIME RECORDING, CASE MANAGEMENT, CLIENT LEDGERS, BANKS & JOURNALS, REPORTS, and SUPERVISOR. The main area displays the 'MATTERS FOR REVIEW' table. At the top of the main area, there is a header with 'Today's Time: 00h:00m', 'Today's Value: £0.00', and a 'Global search' input field. Below the header, there is a purple bar with the word 'help'. The table has four columns: CLIENT, MATTER, CLIENT NAME, and MATTER DESCRIPTION. The table contains five rows of data.

CLIENT	MATTER	CLIENT NAME	MATTER DESCRIPTION
EVA00003	1	Evans Breton B	P/O 33 Devon Road
JAE00001	1	Jaevans Ltd	p/o 27 Pare Street
MOU00002	2	Mouse Minnie M	S/O The Flat
MOU00003	2	Mouse Minnie M	Default Matter
STR001	2	Straton Demo D	testing disbs

Saving the document





The save screen that opens is the same as for all other documents in Osprey.

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 screen or use the search facility to the far right of the screen to find the Matter you require. when done click Load Client.

The screenshot shows the 'Save' screen in the Osprey Case Management App. At the top left, there is a back arrow and a 'Save' button. Below this, there are two input fields: 'Client' with the value 'STR001' and 'Matter' with the value '1'. To the right of the 'Matter' field is a dropdown menu and a 'Global' checkbox. Below the 'Client' field is a red box labeled 'Load Client'. To the right of the 'Load Client' box is a text box with the instruction: 'When done click here to load the selected client and matter'. To the right of the 'Matter' field is a text box with the instruction: 'If the required matter is incorrect type the correct client or matter number here.' To the right of the 'Global' checkbox is a text box with the instruction: 'If you are unsure of the Client and matter number you can search here.'

Now fill in the boxes in the rest of the screen as required.

Folder

 In Tray Items
▼  Matter History
 _00_
>  0_Adelini

Custom Type

Please select...

Description

LetterView (28).doc

Retention Period

Please select...

Processed Date

01/02/2023

When completed click on save at the top of the screen an your document will be added to the matter history. If you click the Arrow next to the save button your document will not be saved to the matter history.