

Osprey Approach: Using the General File System (App)

This help guide was last updated on
Jul 30th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=60098>

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This guide will show you how to use the General File System in the app

The General File System is where you can add internal documentation that have nothing to do with any client work, for example, Staff Holiday Requests or your own Health & Safety Procedures.

Accessing the File System

To access the File System, navigate to Osprey Home > File System

Any previously saved documents will appear here.

The screenshot shows the 'General File History' section of the Osprey app. The interface includes a sidebar with navigation options and a main content area displaying a table of document history. The table has the following columns: TYPE, REF NUMBER, DETAILS, CREATED BY, and CREATED DATE. The table contains several rows of document entries, including '01 General Document', 'demo', '01 General Document addin', '00 global general', 'general doc 11', 'general doc 10', 'general doc 8', 'general doc 7', 'general doc 6', 'refactor addin', '01 General Document', and 'xlsx'.

TYPE	REF NUMBER	DETAILS	CREATED BY	CREATED DATE
📄	120097	01 General Document	dan	27/12/2023
📄	119361	demo	user9	05/10/2023
📄	119298	01 General Document addin	user9	03/10/2023
📄	119297	00 global general	user9	03/10/2023
📄	119200	general doc 11	user9	29/09/2023
📄	109147	general doc 10	user9	27/09/2023
📄	109146		user9	27/09/2023
📄	109145	general doc 8	user9	26/09/2023
📄	109144	general doc 7	user9	26/09/2023
📄	109143	general doc 6	user9	26/09/2023
📄	109142	refactor addin	user9	26/09/2023
📄	97940	01 General Document	adelini	09/05/2023
📄	97653	xlsx	mihai	02/05/2023

Uploading a new Document

To add a new document, click Add Document

General File History








[+ Add Document](#)

This will open Windows file explorer, allowing you to select the file to upload.

Click Open, and the document will be added into Osprey.

Further actions

The General File History works in exactly the same way as your Matter History, with a list of actions available upon right-click.

TYPE	REF NUMBER	DETAILS	CREATED BY	CREATED DATE
	120097	01 General Document	dan	27/12/2023
	119361	dem	user9	05/10/2023
	119298	01 G	addin user9	03/10/2023
	119297	00 g	user9	03/10/2023
	119200	gene	user9	29/09/2023
	109147	gene	user9	27/09/2023
	109146		user9	27/09/2023

- Edit
- Preview
- Download
- Clone
- Check Out
- Revision History
- Delete