

Osprey Approach: Using the General File System

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Jul 30th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=960>

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

The General File System is where you can add internal documentation that are not client related, 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 > General File System (New)

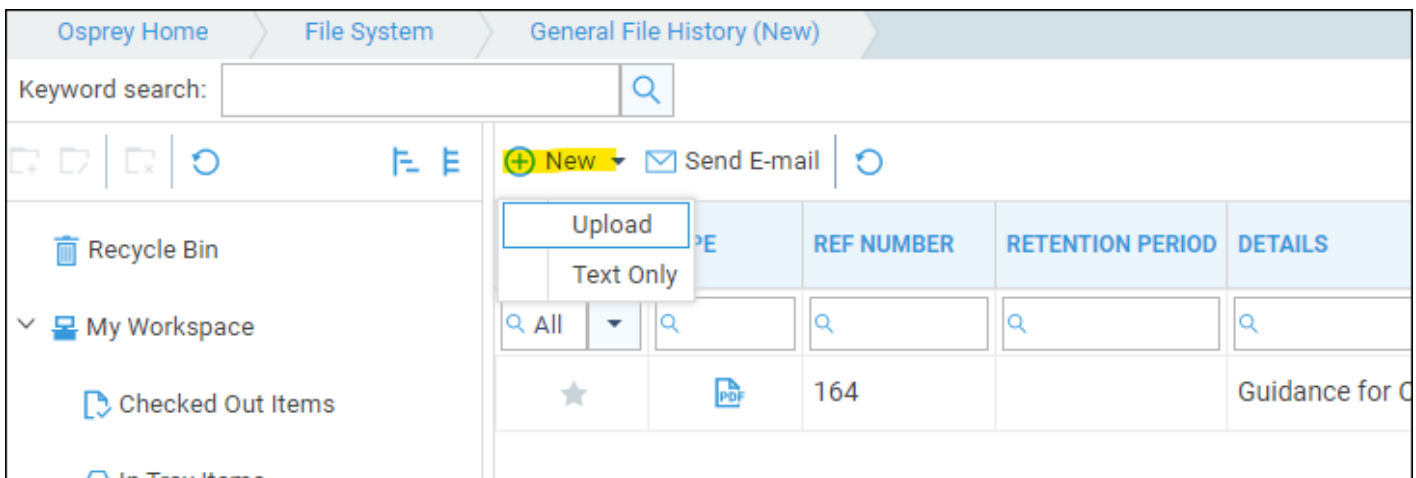
Any previously saved documents will appear here.

FAVORITE	TYPE	REF NUMBER	RETENTION PE...	DETAILS	CREATED DATE	CREATED BY
🔍 All ▾	🔍	🔍	🔍	🔍	🔍	🔍
★	📄 PDF	3685		Probate Turnkey Case...	10/10/2018 11:23:43	rob
★	📄 PDF	3684		Probate - Client Inform...	10/10/2018 11:23:14	rob
★	📄 PDF	3683		Personal Injury Turnke...	10/10/2018 11:21:24	rob

Add a document to the File System

To add a document to the file system, navigate to Osprey Home > File System > General File System (New).

Click the New button, and select New.



The screenshot shows the Osprey Home File System interface. The breadcrumb navigation is 'Osprey Home > File System > General File History (New)'. There is a 'Keyword search:' field with a search icon. Below the search field is a toolbar with icons for 'New' (highlighted in yellow), 'Send E-mail', and a refresh icon. A dropdown menu is open under the 'New' button, showing 'Upload' and 'Text Only' options. Below the toolbar is a table with columns: 'FAVORITE', 'TYPE', 'REF NUMBER', 'RETENTION PERIOD', and 'DETAILS'. The table contains one row with a star icon, a PDF icon, the reference number '164', and the detail 'Guidance for C'.


To add a new file, select Upload.

New Matter History Item □ ×

Custom Type: ▼

Folder: ▼

Text Only: File**:
 ...

Processed date: 

Retention Period: ▼

Retention Date: ▼

Description

Details (required)

Similar to the client Matter History you can add a custom type if you wish, and a folder. Select the ... button alongside the File** box to select the file you want to add. Enter an optional processed date and retention period, Details are mandatory and will form the details line visible when looking at the file history. Click Save when you are done.

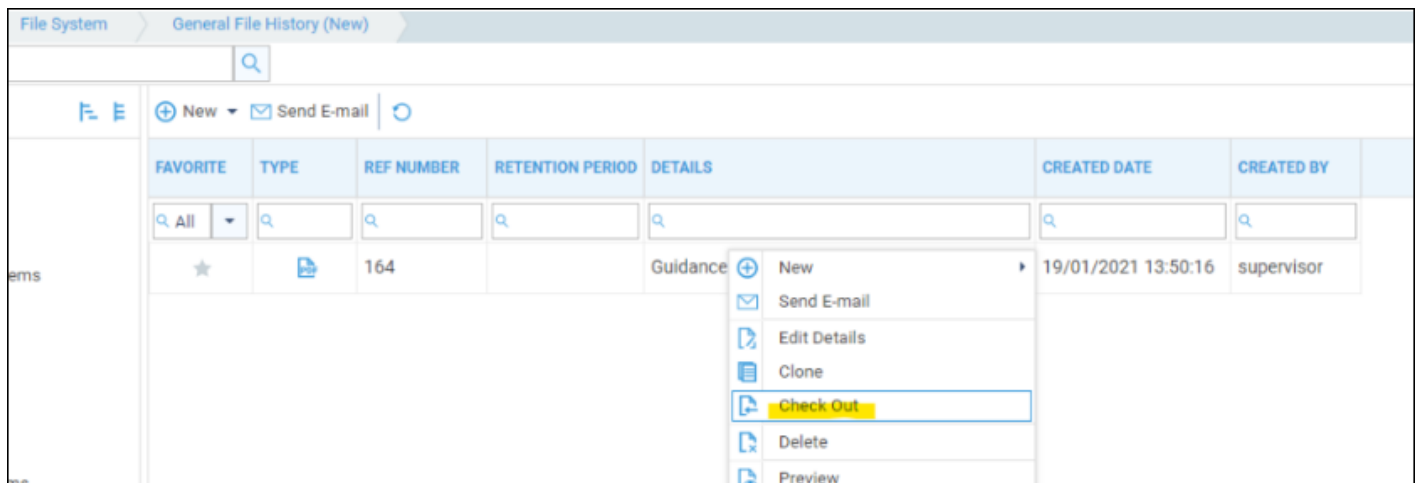
You can also drag and drop files into the File History. To do this, open the File Explorer on your PC and navigate to the folder in which the documents are stored. You can multiselect to drag and drop more than one document at a time.

Please note that the size and quantity of documents you can upload in one go will depend on your internet connection. It is not recommended to try to upload more than about 20-30 MB in one go.

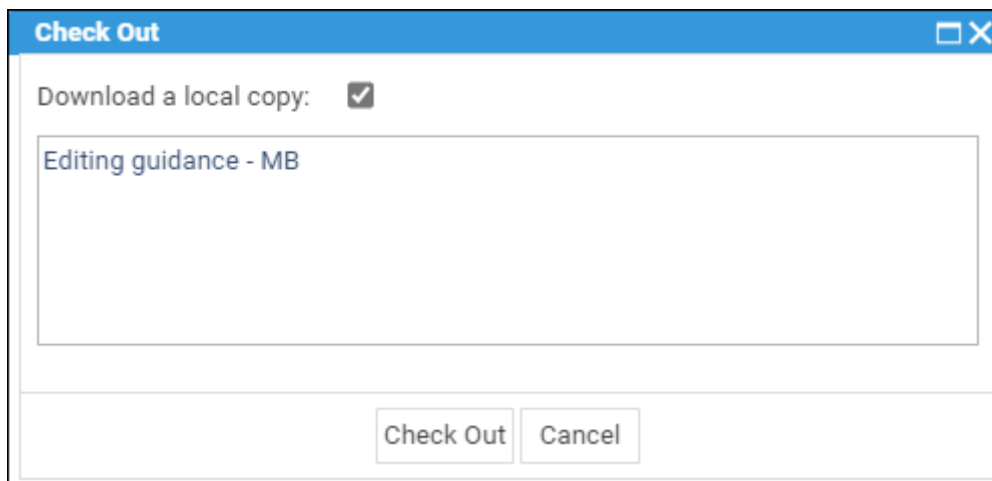
Amending a file in the File History

You can check out and amend documents saved in the file history in the same way as in the clients Matter History.

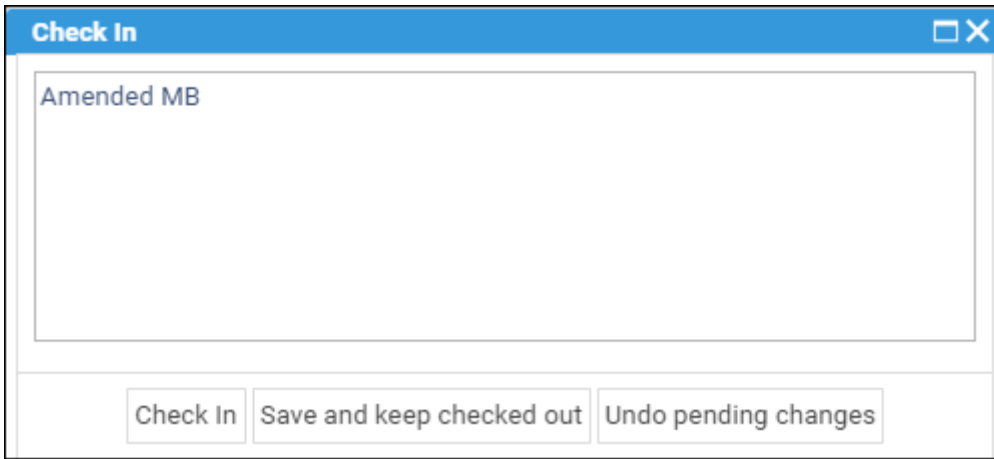
Right click the document you want to amend, and click Check Out.



Enter an optional comment and click Check Out. If the file is a PDF you will need to download a local copy.



Make your modifications and close the document. If your document is a Word or Excel document, simply enter a check in comment and click Check In.



Viewing document revisions

All versions of documents you have amended are stored under the Revision History tab of the details panel. Simply click the document and the details panel will appear on the right hand side of the screen. Right click to see a list of actions.

Item Details		Revision History																													
Download		<table border="1"> <thead> <tr> <th>TYPE</th> <th>NAME</th> <th>VERSION</th> <th>SIZE</th> <th>CREATED BY</th> <th>CREATED DATE</th> <th>COMMENT</th> <th>EX</th> </tr> </thead> <tbody> <tr> <td></td> <td>guidetothepri...</td> <td>2</td> <td>427.37 Kb</td> <td>supervisor</td> <td>02/02/2024 12:41:17</td> <td>Amended MB</td> <td></td> </tr> <tr> <td></td> <td>guidetothepri...</td> <td>1</td> <td>427.37 Kb</td> <td>supervisor</td> <td>02/02/2024 12:20:17</td> <td></td> <td></td> </tr> </tbody> </table>						TYPE	NAME	VERSION	SIZE	CREATED BY	CREATED DATE	COMMENT	EX		guidetothepri...	2	427.37 Kb	supervisor	02/02/2024 12:41:17	Amended MB			guidetothepri...	1	427.37 Kb	supervisor	02/02/2024 12:20:17		
TYPE	NAME	VERSION	SIZE	CREATED BY	CREATED DATE	COMMENT	EX																								
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	guidetothepri...	1	427.37 Kb	supervisor	02/02/2024 12:20:17																										

Running a general document

To produce a new document, navigate to Osprey Home > File System.

DESCRIPTION	↑	EXPERT TYPE	COPY TO CLIENT	COPY TO ASSOCIATE	SELECT
Holiday Request			N	N	✓
Risk Register			N	N	✓












Page 1 of 1 (2 Items) Page size: 10

















Any General Documents will be available here. Click the Select icon against the letter you wish to run. Word will launch with your chosen document open. Amend as you need to and then close the document and save it as you normally would when using Osprey.

Further actions

The document is then saved into the General File System.

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

FAVORITE	TYPE	REF NUMBER	RETENTION PERIOD	DETAILS
★		109142		
★		109144		
★		119200		
★		119298		
★		109145		
★		119297		
★		109143		
★		109146		
★		109147		
★		119361		
★		48047		

-  New
-  Send E-mail
-  Edit Details
-  Clone
-  Check Out
-  Delete
-  Preview
-  Download
-  View Details
-  View Revision History
-  View Security
-  Subscribe to Notifications
-  Unsubscribe All Notifications
-  Add Retention Policy
-  Change Owner
-  Refresh