



Osprey Approach: Use the General File System


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Dec 22nd, 2022

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





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.



To access the File System, select the Osprey Home tab and then click on File System.

Description Search: 

Include Global

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












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Any documents you have chosen to save here will be displayed. 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.

Any saved documents will be found in the General File History. Select Osprey Home and click on File System. Then select General File History.

The General File History works in exactly the same way as your Matter History.

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