



Osprey Approach: Add an item to the matter history

This help guide was last updated on
Jan 6th, 2022

The latest version is always online at
<https://support.pracctice.com/?p=35304>

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Who is this guide for?

Any Users

Any documents you have stored locally, or on a network drive, can be uploaded to the matter history against your clients to enable a fully paperless office.

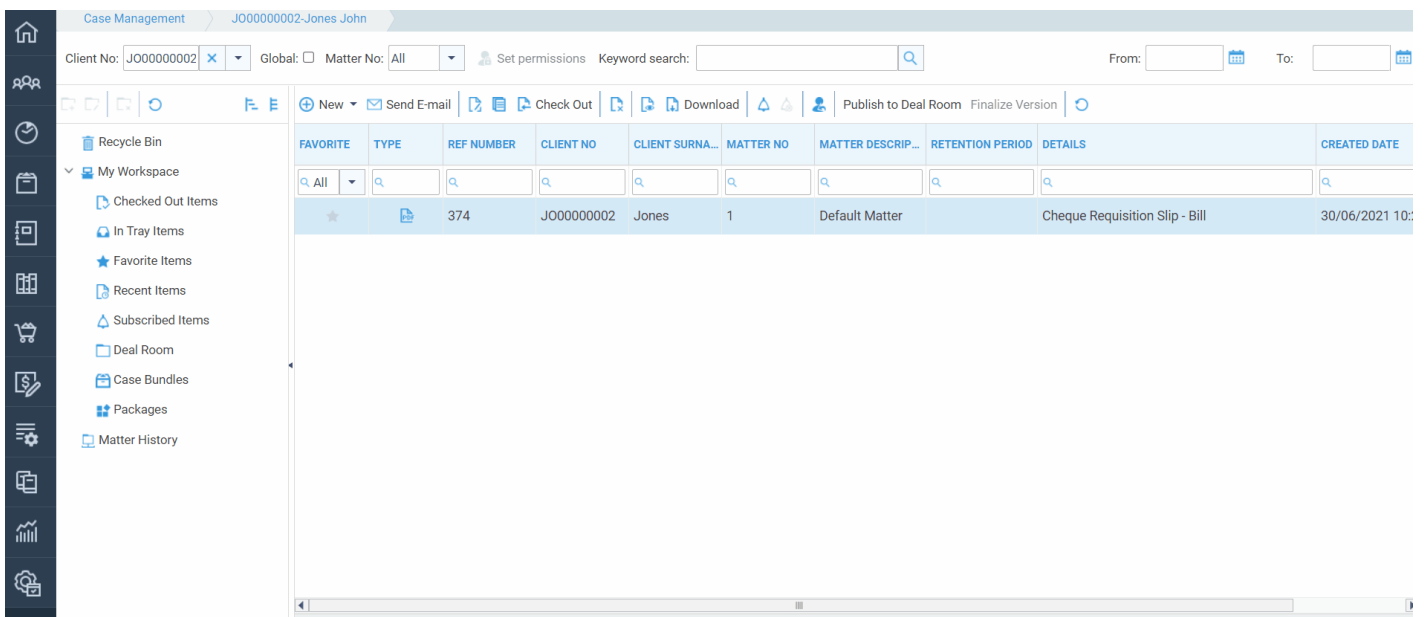
To add a new document, you can use either of the methods below.

Drag & Drop

Please note that Drag and Drop is only currently available when using Osprey Web via a Web Browser.

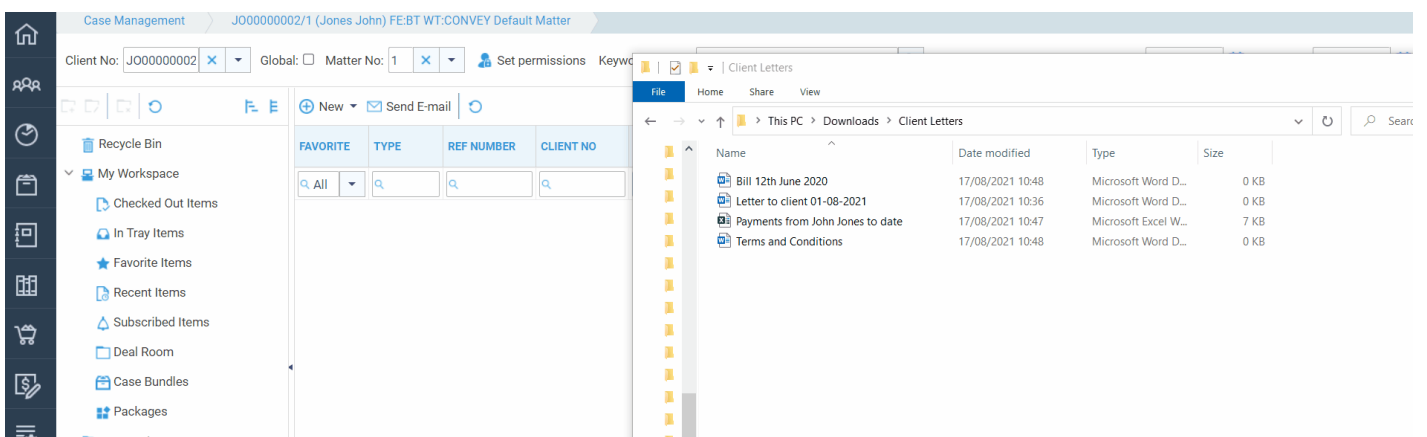
To add an item to the matter history using the drag and drop method, first select the client/matter to which you'd like to save the file, and ensure you are sitting in the Matter History. If you wish to upload to a Matter History folder ensure you have the correct folder selected.

Next, in file explorer, navigate to the folder in which your local/network/USB drive document is held, then simply drag it from the folder and into the matter history of the client/matter you wish to save it to.



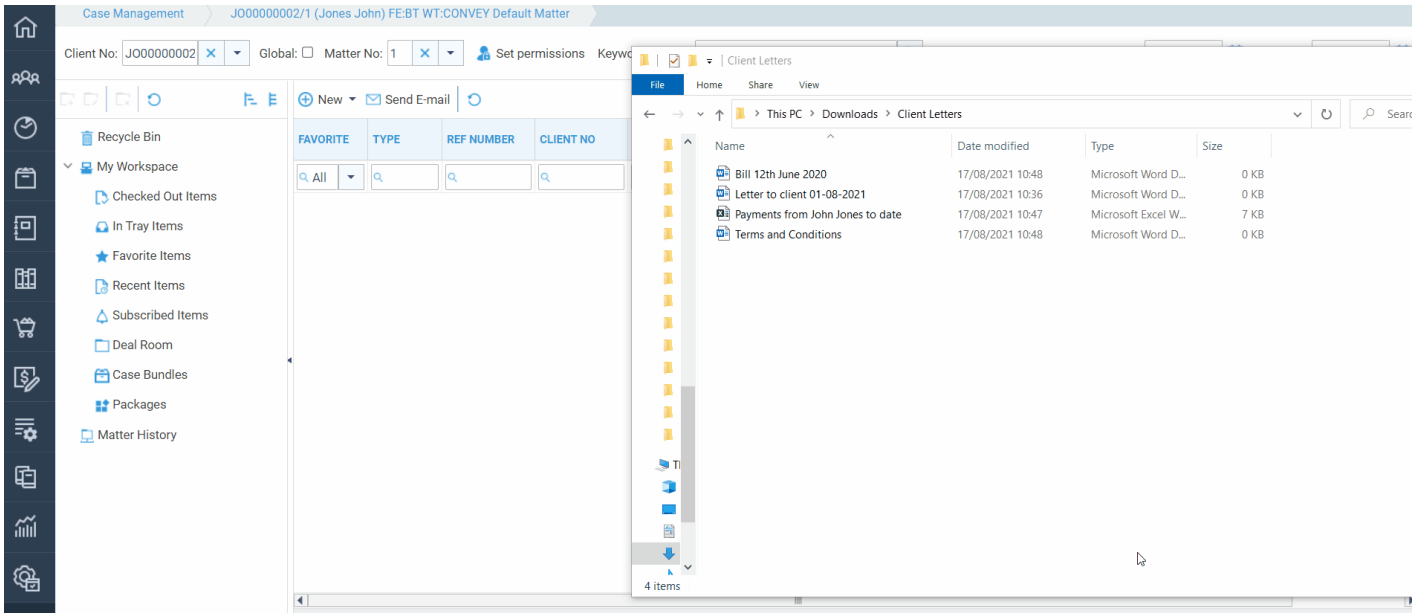
The screenshot shows the Osprey Web interface for Case Management. The breadcrumb path is "Case Management > JO00000002-Jones John". The client number is "JO00000002". The interface includes a navigation sidebar on the left with options like "Recycle Bin", "My Workspace", "Checked Out Items", "In Tray Items", "Favorite Items", "Recent Items", "Subscribed Items", "Deal Room", "Case Bundles", "Packages", and "Matter History". The main area displays a table with the following columns: FAVORITE, TYPE, REF NUMBER, CLIENT NO, CLIENT SURNA..., MATTER NO, MATTER DESCIP..., RETENTION PERIOD, DETAILS, and CREATED DATE. A single row is visible with the following data: FAVORITE (star icon), TYPE (document icon), REF NUMBER (374), CLIENT NO (JO00000002), CLIENT SURNA... (Jones), MATTER NO (1), MATTER DESCIP... (Default Matter), RETENTION PERIOD, DETAILS (Cheque Requisition Slip - Bill), and CREATED DATE (30/06/2021 10:00).

You can upload multiple documents at the same time in this way:



The screenshot shows the Osprey Web interface for Case Management with a File Explorer window open. The breadcrumb path is "Case Management > JO00000002/1 (Jones John) FE:BT WT:CONVEY Default Matter". The client number is "JO00000002" and the matter number is "1". The File Explorer window is open to "This PC > Downloads > Client Letters" and shows a list of files:

Name	Date modified	Type	Size
Bill 12th June 2020	17/08/2021 10:48	Microsoft Word D...	0 KB
Letter to client 01-08-2021	17/08/2021 10:36	Microsoft Word D...	0 KB
Payments from John Jones to date	17/08/2021 10:47	Microsoft Excel W...	7 KB
Terms and Conditions	17/08/2021 10:48	Microsoft Word D...	0 KB



Manually add a document

You can also use the New option to add a document, or a note to the matter history.

