Osprey Approach: Create a Package of files (Browser)
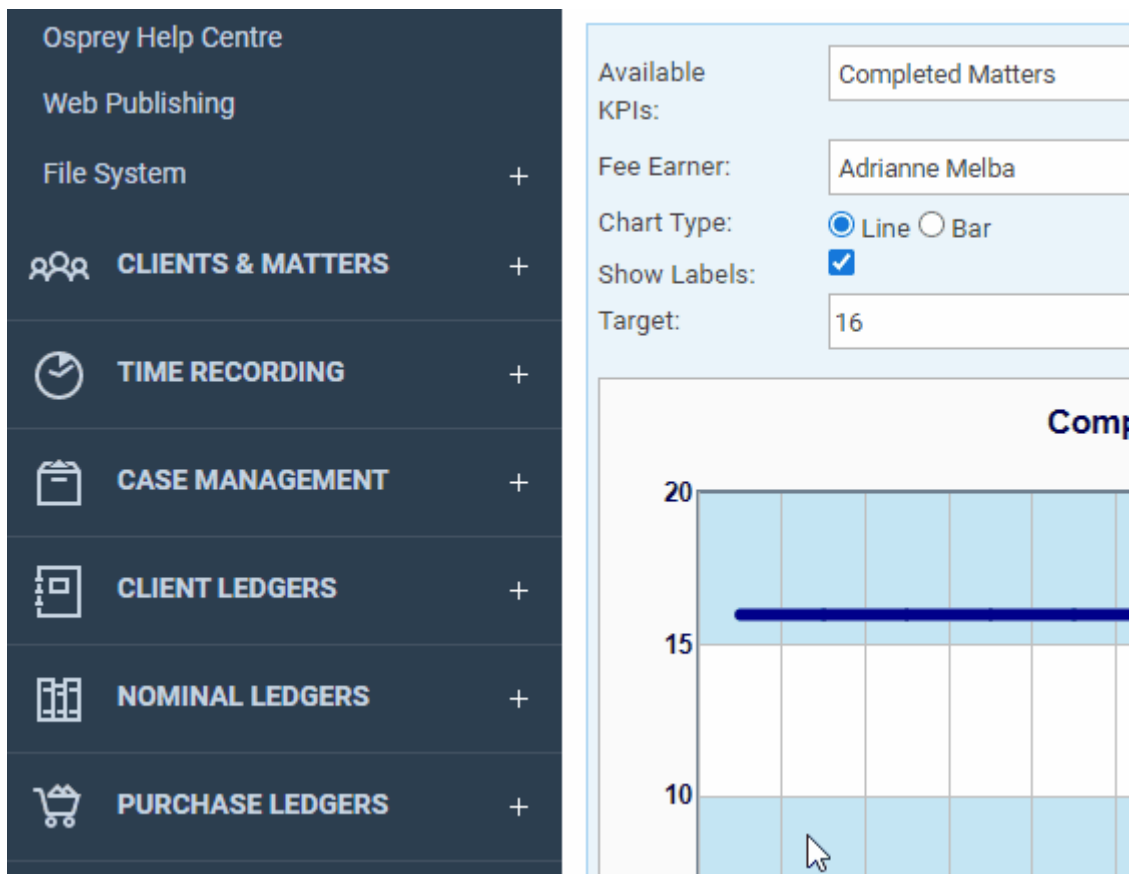
This help guide was last updated on Jan 19th, 2024

The latest version is always online at https://support.ospreyapproach.com/?p=21865

Osprey Help Centre

Web Publishing

File System +

 CLIENTS & MATTERS +

 TIME RECORDING +

 CASE MANAGEMENT +

 CLIENT LEDGERS +

 NOMINAL LEDGERS +

 PURCHASE LEDGERS +

Available KPIs:	Completed Matters
Fee Earner:	Adrianne Melba
Chart Type:	◉ Line ○ Bar
Show Labels:	☑
Target:	16

Comp

20

15

10

Select Case Management and in the Workspace click Packages

Click New

You may choose to generate either a zip file or a pdf. If a PDF is chosen, all of the files chosen are saved to one PDF:

If a ZIP file is chosen, all of the files are zipped up into a zip file which will extract to give the files in the same format as they are stored in the matter history.

Name	Date modified	Type	Size
∨ Today (1)			
028711c0-c48a-4ecd-81ce-56ec7bf2d32c	11/08/2020 10:28	Compressed (zipp...	1,566 KB

You can also choose whether the package will expire to prevent your clients from opening them after a certain date has passed.

New Package

Package type*:

ZIP ○

PDF ●

Expire Date*:

No expire date ●

Expire by ○

Matter History Items*:

☑	TYPE	REF NUMBER	CLIENT NO	MATTER NO	DETAILS	CREATED DATE	CREATED BY
☑		57315	0000001	1	Outlook import...	14/07/2020 10:26:10	dan
☑		57314	0000001	1	Outlook import...	14/07/2020 10:23:31	dan
☑	PDF	55625	0000001	1	This is a PDF t...	17/06/2020 13:17:25	dragos
☑	PDF	55624	0000001	1	This is a test d...	17/06/2020 13:14:10	dragos
☑		54888	0000001	1	FW Adapt 202...	28/05/2020 08:45:01	dragos
☑		54883	0000001	1	Outlook import...	28/05/2020 08:42:29	dragos
☑		54880	0000001	1	rich content m...	28/05/2020 08:32:42	dragos
☑		54879	0000001	1	Simple msg	28/05/2020 08:29:58	dragos
☑		54878	0000001	1	Rich html cont...	28/05/2020 08:23:16	dragos

Page 1 of 2 > » Goto next page ▼ per page

Showing 1 - 20 of 27

Save   Cancel

To choose the files you want to include in the package, select them by holding down the CTRL key on your keyboard, and clicking the small square box on the left hand side of the screen:

Click Save when you are ready to create your package. To email the package link to someone, right click it in the packages section in the matter history.

You are also able to prefix a package with the file reference numbers by toggling this switch. The downloaded zip package renames the files by adding their Matter History Ref Number to the beginning of each file name.

From here, you can choose to download the package to send as an attachment in an Outlook email, or email it using the inbuilt email facility.