Osprey Approach: Set up and Manage Matter History Folders (Browser)

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Dec 27th, 2023

The latest version is always online at
https://support.ospreyapproach.com/?p=2353

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Osprey™ Approach

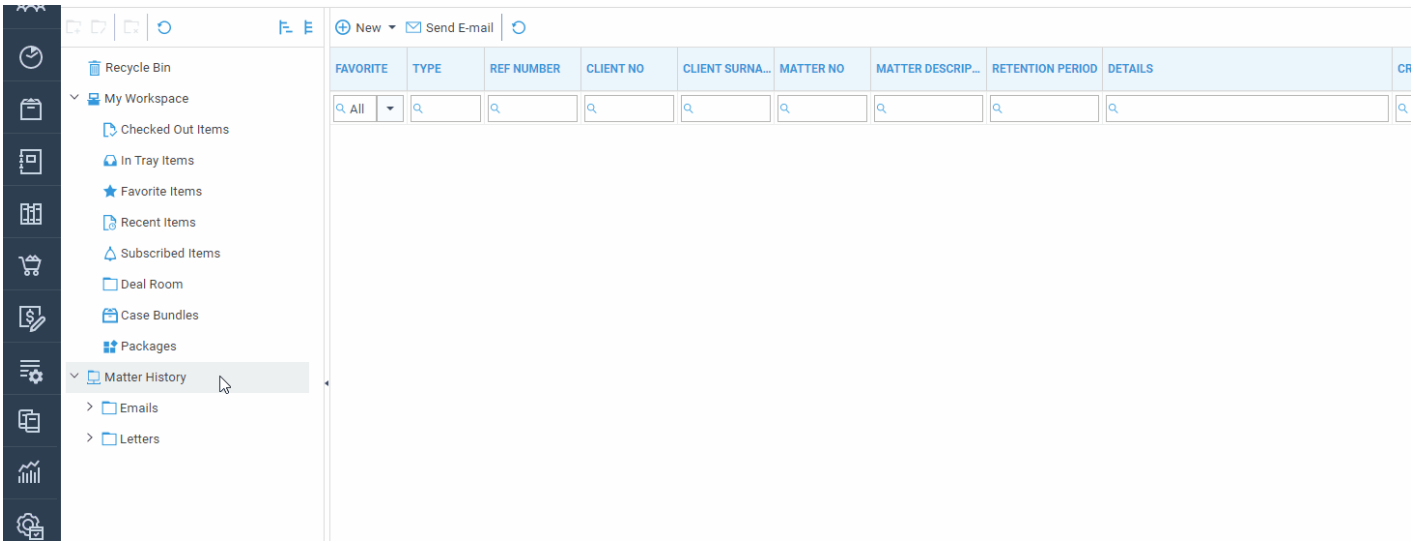
You can set up folders in the matter history which allow you to better organise your case management area.

Matter history folders can be used to organise your documents to enable to you to locate them easily. You can, for example, put all client correspondence in one folder.

> Matter History folders are not specific to one matter, nor to a worktype, but are global across all clients, matters and work types.

Add new / rename a Matter History folder

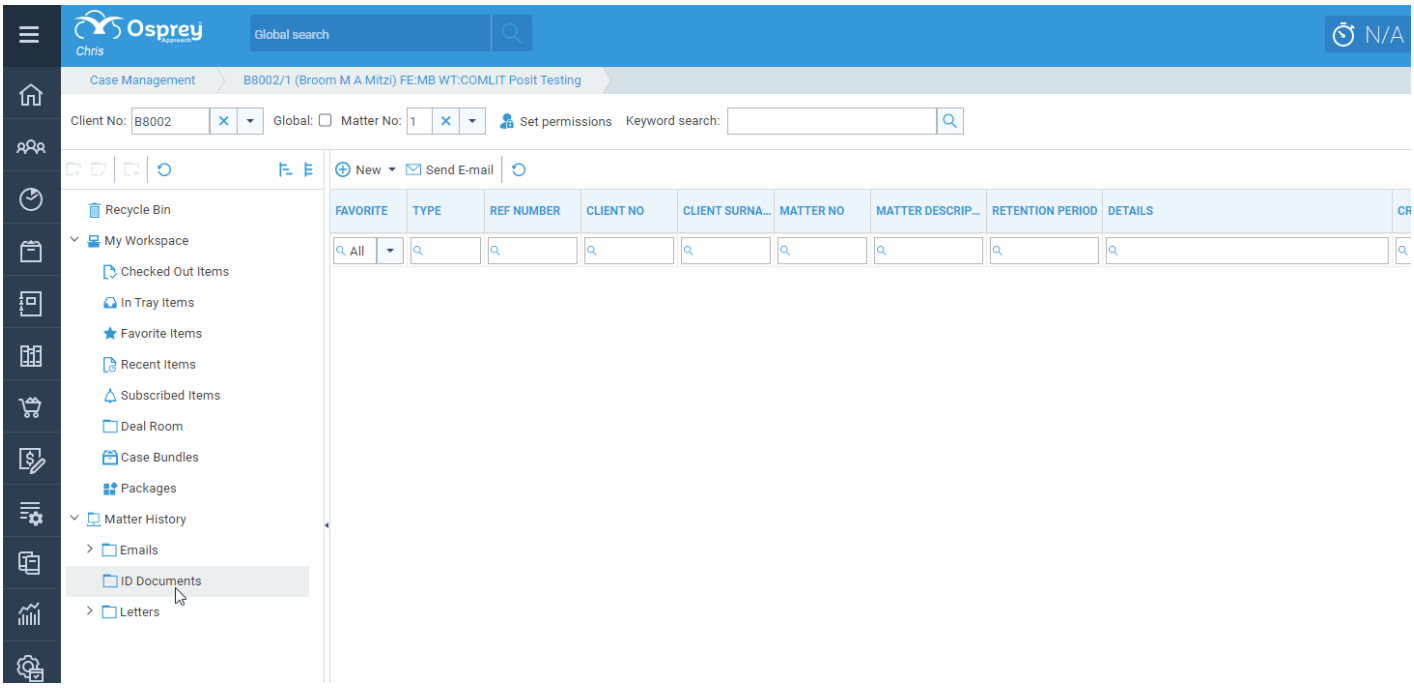
In the matter history, right click the matter history in the My Workspace section and select new. Enter the folder name and click Save. The folder can be renamed if required by right clicking and selecting Rename.



Delete a folder

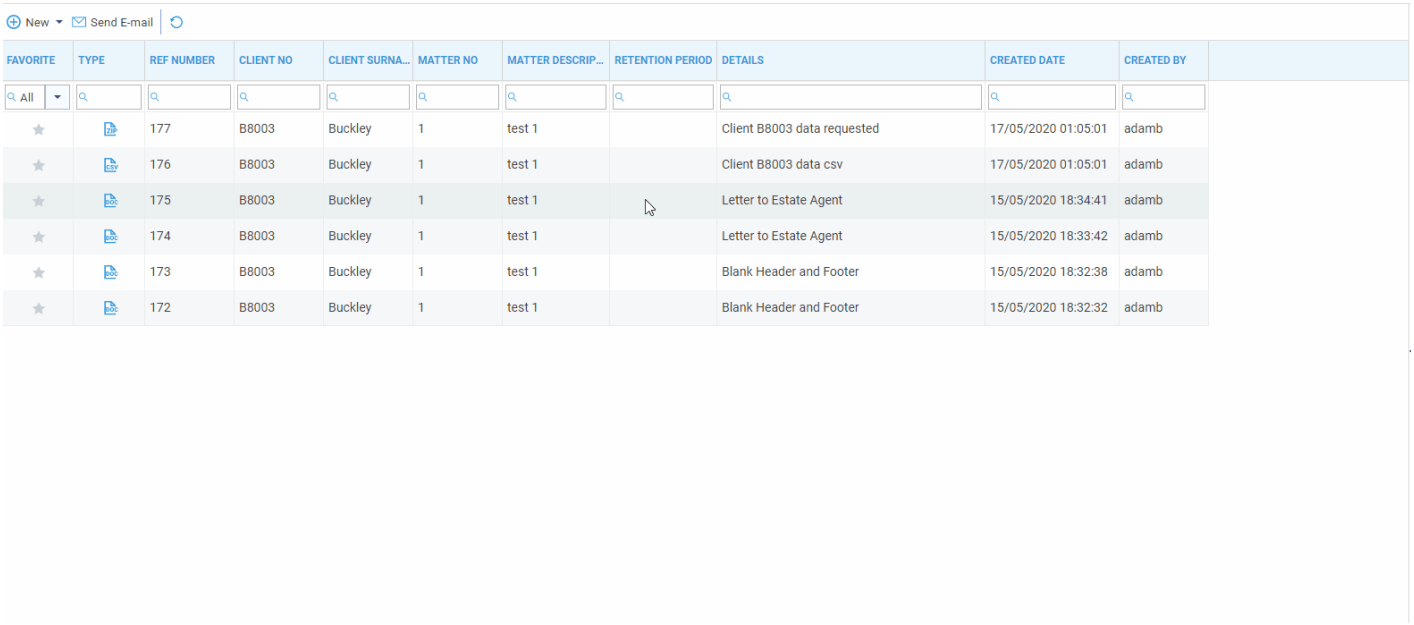
> All items must be removed from a folder before the folder can be deleted.

To delete a folder, right click the folder and select delete.

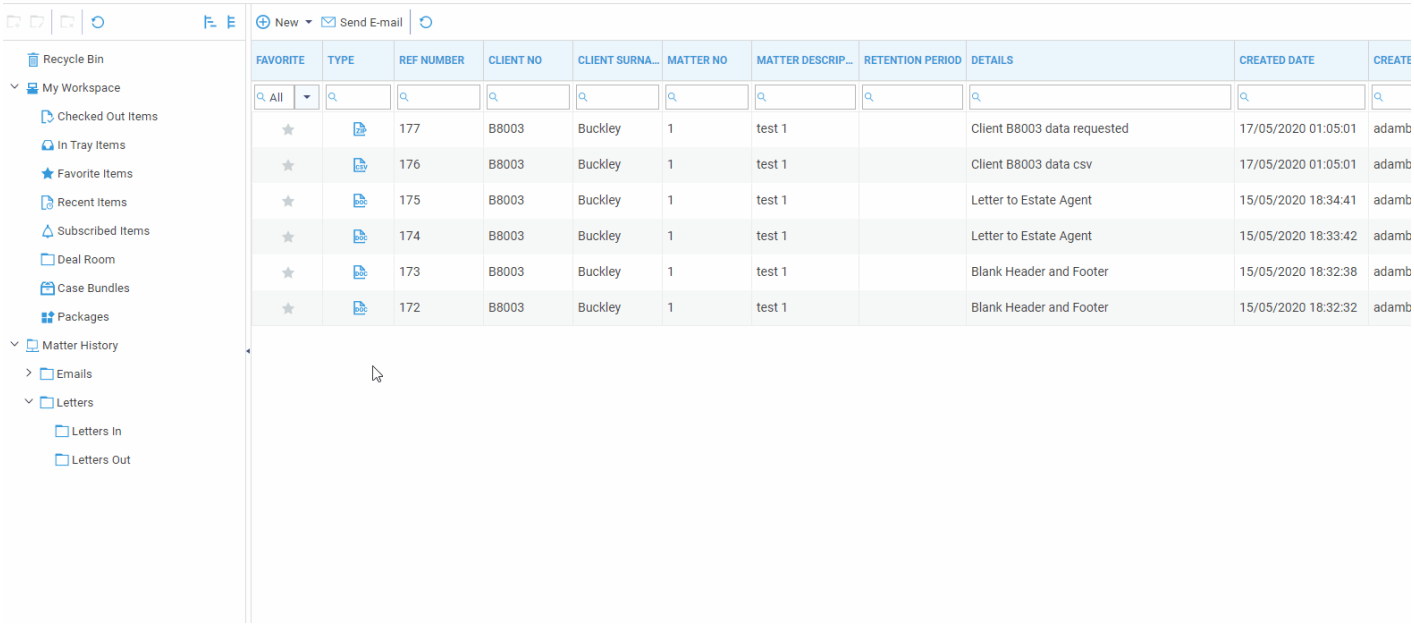


Working with files within folders

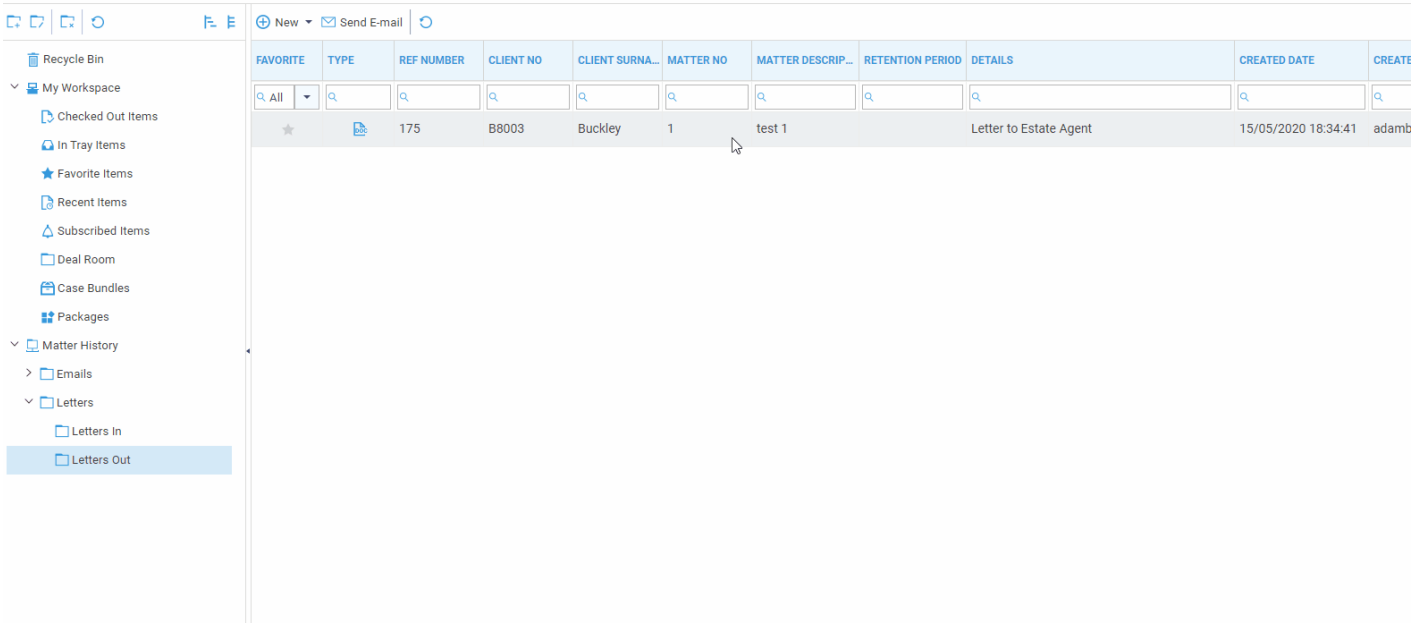
To add existing items into the folder, right click the item entry in the main matter history and select Edit Details, then select the folder from the drop-down list, clicking Save to save your changes.



To move an item from one folder to another, click the folder that the item is in, right click the item and select edit details. Click the drop-down arrow to select the new folder and click Save to keep your changes.

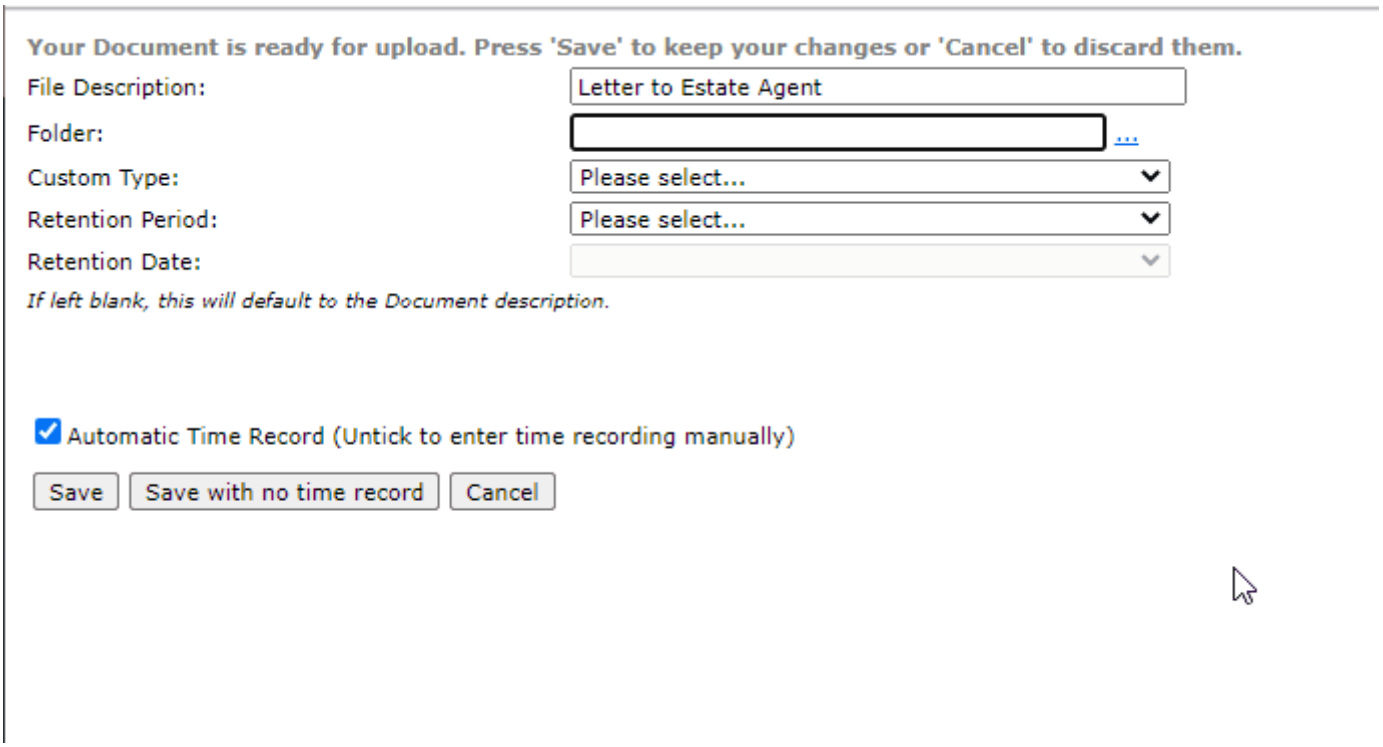


To remove an item from a folder right click it, select Edit Details, click the cross next to the folder name and then click Save.



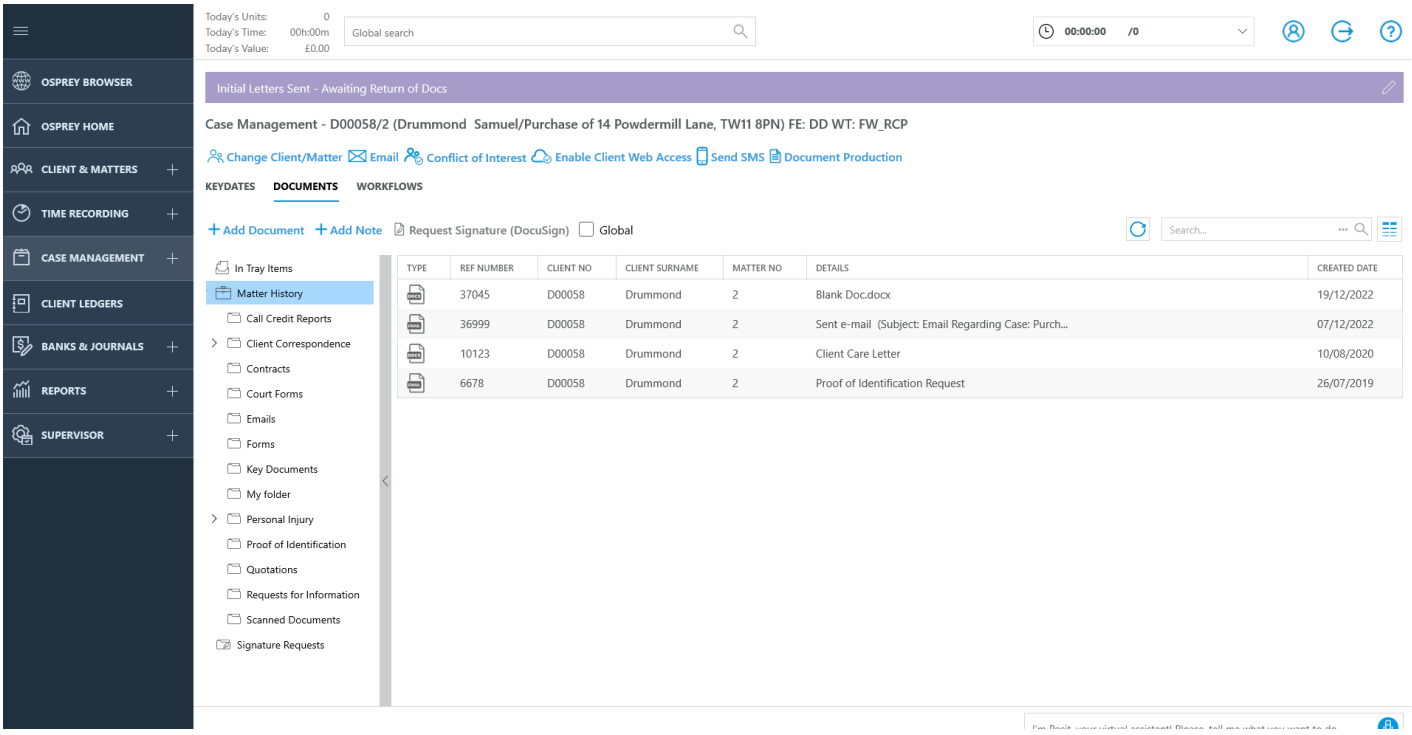
Running a new document and saving to a folder

When new documents are run through Document Production, you can choose the folder to save the document to at the point of save:



Add new / rename a Matter History folder in the Case Management app

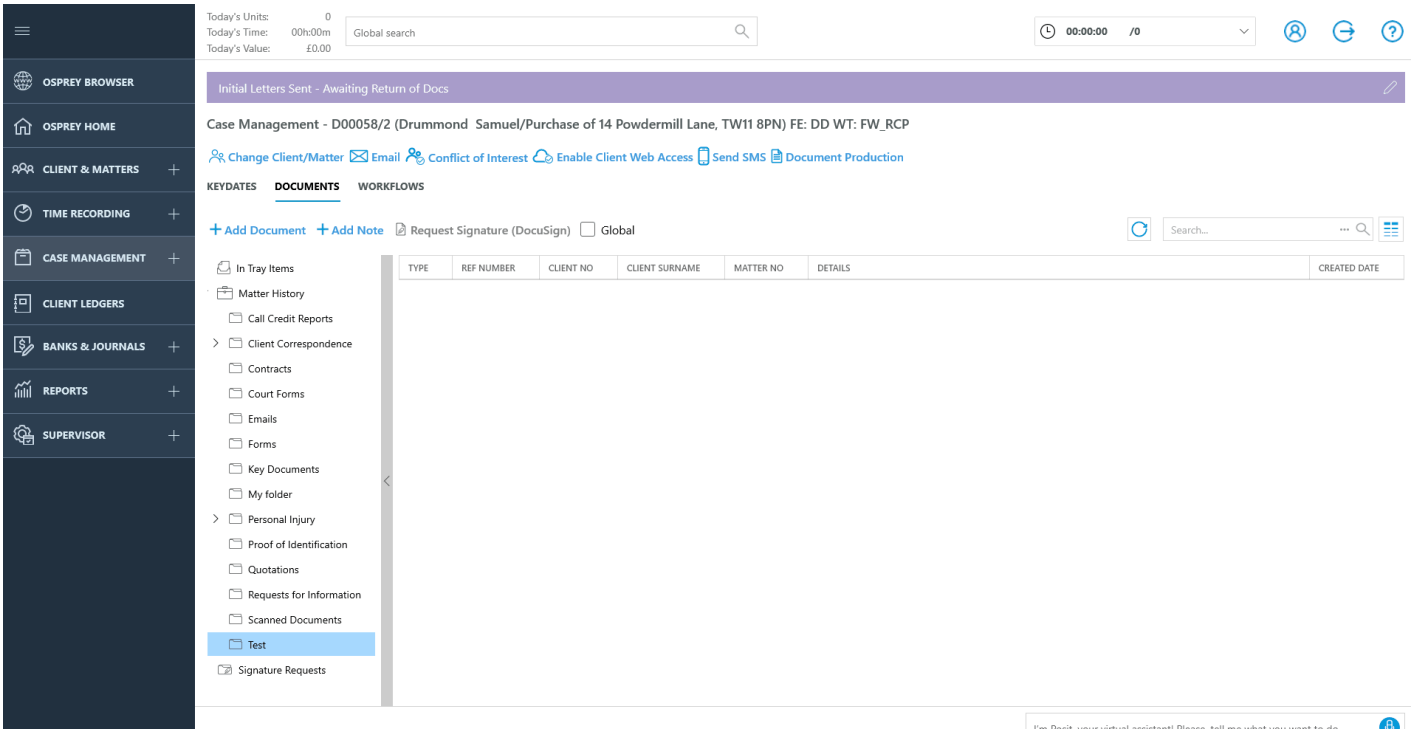
In the Matter History right click on the matter history folder and click new, then enter your folder name and click save.



Delete a Folder in the Case Management app

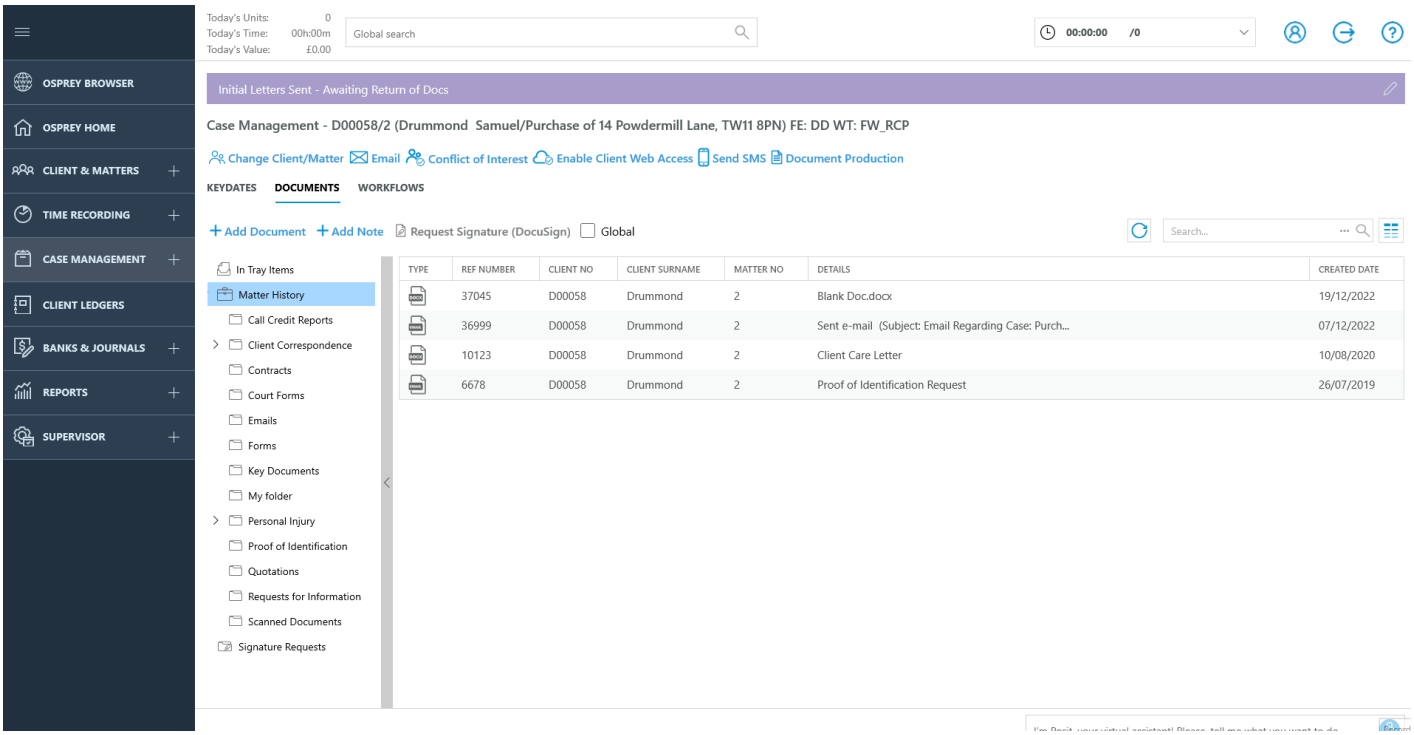
All items must be removed from a folder before the folder can be deleted.

To delete a folder, right click the folder and select delete, then click ok.



Working with files within folders in the Case Management App

Too add existing files in the matter history into a new folder right click and the click edit, then change the folder location and then click save



To remove a folder from a matter history folder right click on the item, click edit then chose to move it back to the matter history folder, then click save.

