

Osprey Approach: Check Out a Document for Editing (App)

This help guide was last updated on
Jul 26th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=60863>

[Click here for a printer-friendly version](#)

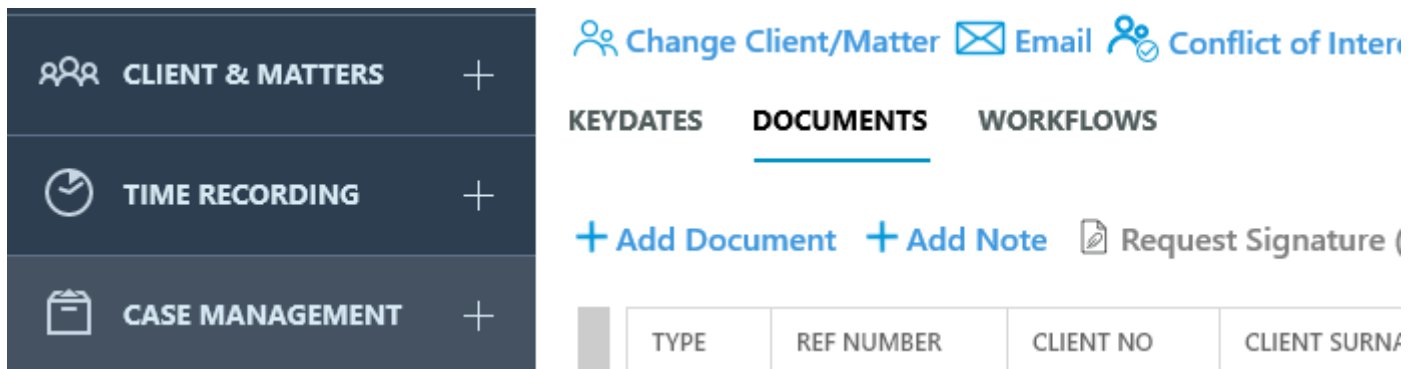


This guide will go through checking out a document for editing in the case management app

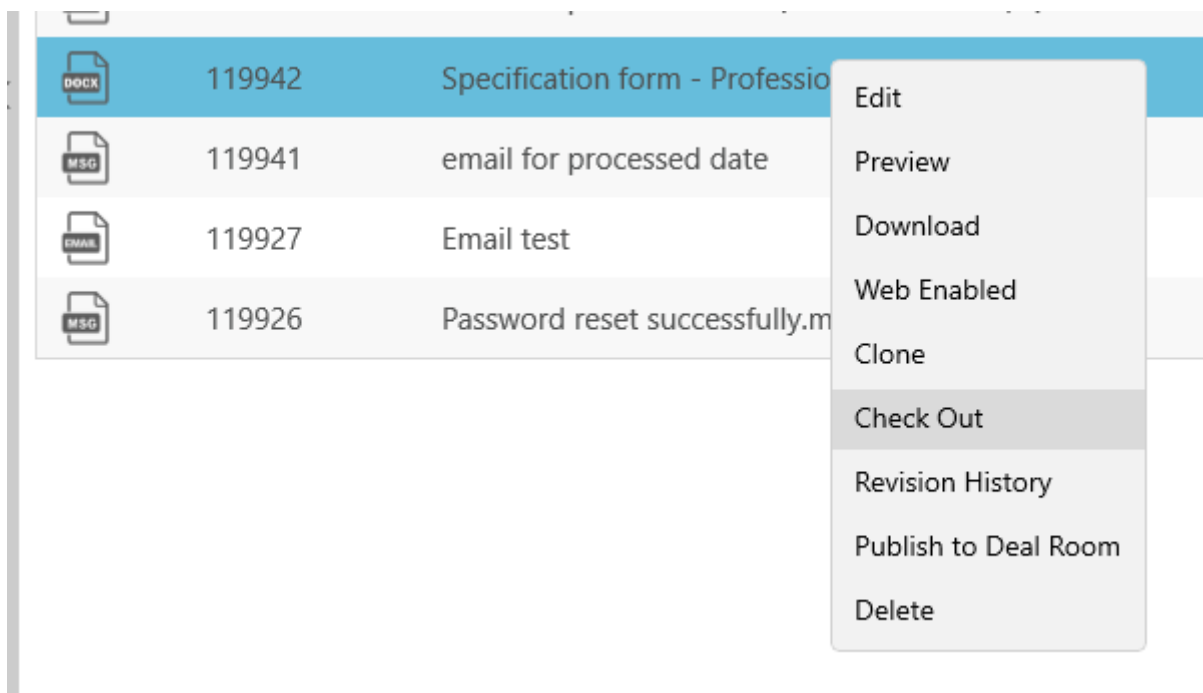
Osprey's check out functionality allows you to "check out" a document for editing, preventing other users from also making amendments, and keeping a history of revisions available for preview and downloading.

Checking out

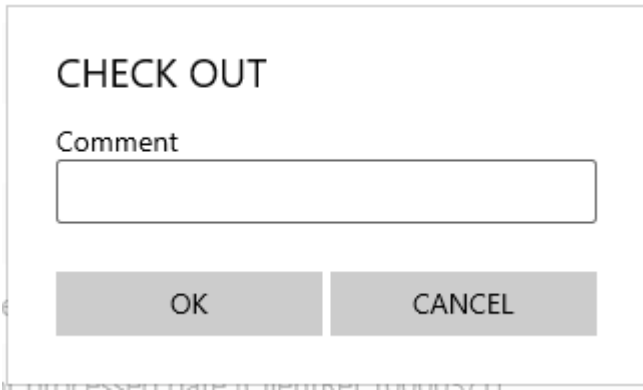
To check out a document, Navigate to Case Management and select the Documents tab.



Right-click the desired document, and select Check Out



A prompt will appear. You can leave an optional comment, then click OK



A dialog box titled "CHECK OUT" with a "Comment" label and an empty text input field. Below the input field are two buttons: "OK" and "CANCEL".

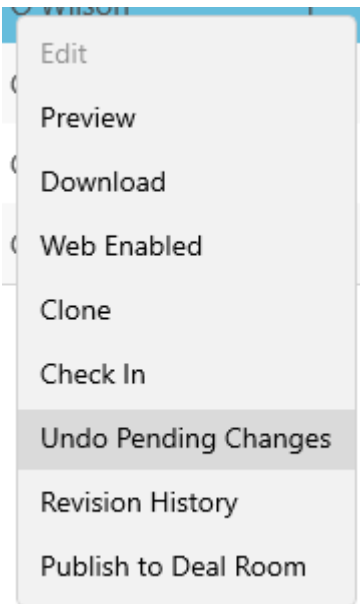
Word will now open, allowing you to continue editing the document.

Checked-out document options

Documents that are checked out for editing will show within the Type column, with a tick.



If you right-click this document again, you will see a new set of options.



Saving in options

When you have finished with any amendments, close the document.

Osprey will then present a Check In screen. You are required to leave a comment at this stage.



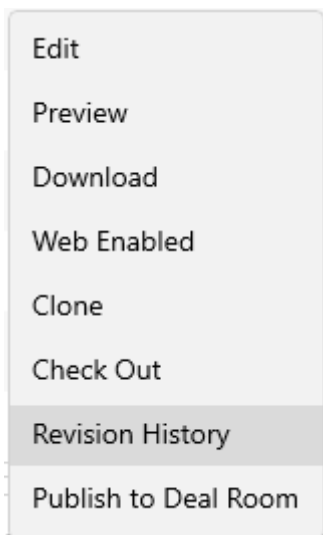
Comment

Amendments to 2nd paragraph

Click Check in. The document will now be saved, with previous versions visible within the Revision History

Revision History

To view the Revision History, right-click the document, and select Revision History.



A history of the amendments to the document will be visible, along with any comments.

Previous versions can be downloaded or previewed by right clicking the relevant version.

Revision History - Specification form - Professional services work.docx



Version 2	Created by Dan2	Created Date 28/12/2023
Comment Amendments to 2nd paragraph		

Version 1	Created by dan	Created Date 01/12/2023
Comment	Preview Download	
