

# 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>

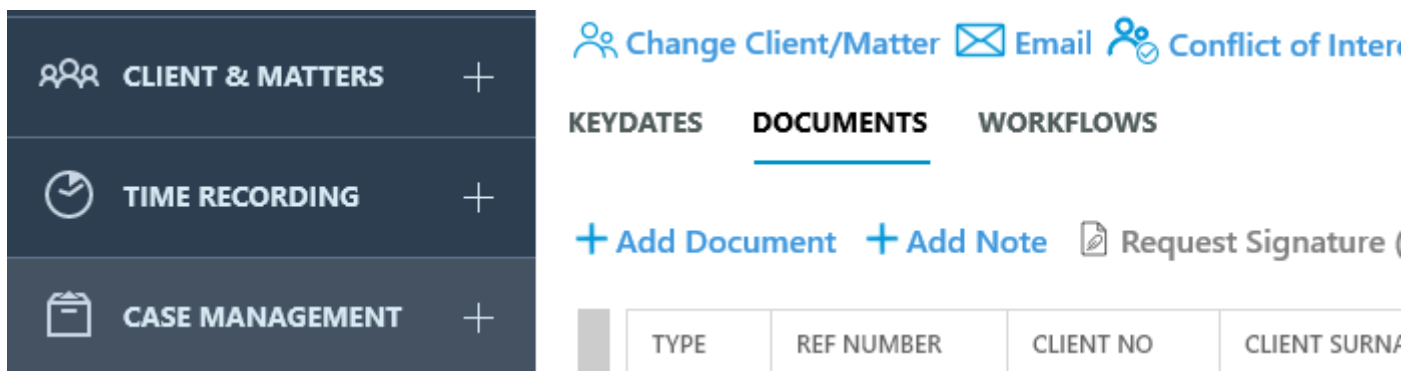


# This guide will go through checking out a document for editing in the case management app

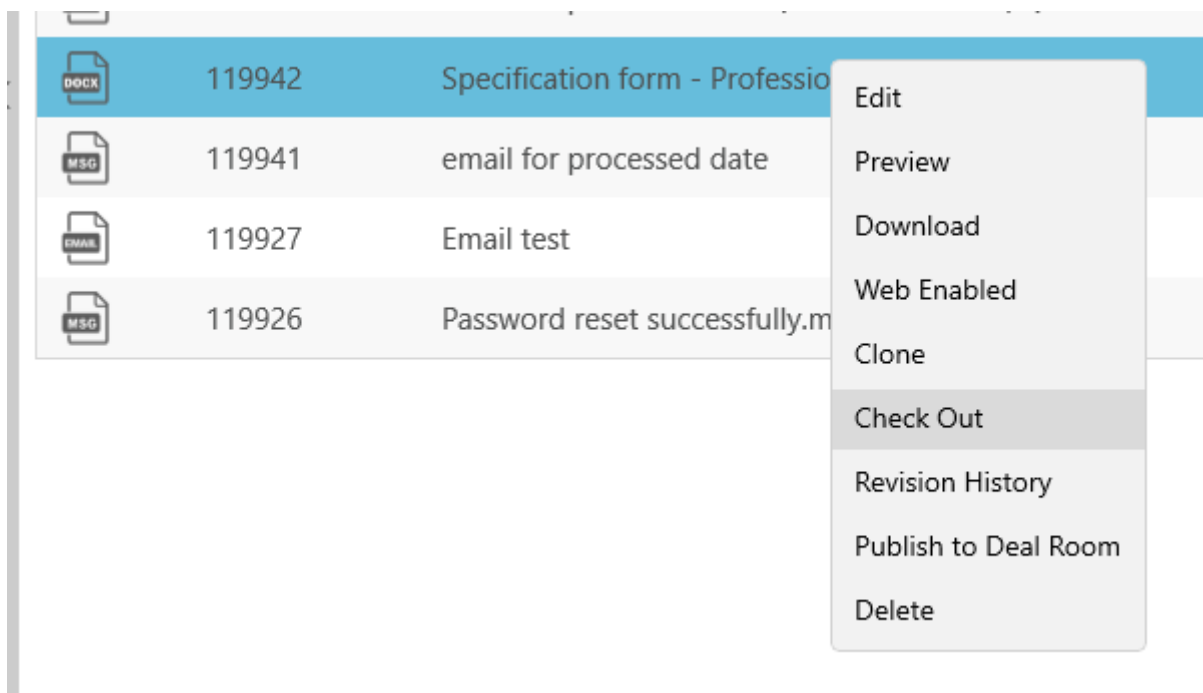
Osprey's check out functionality allows you to "check out" a document for editing, preventing other users from also making amendments, and keeping a history of revisions available for preview and downloading.

## Checking out

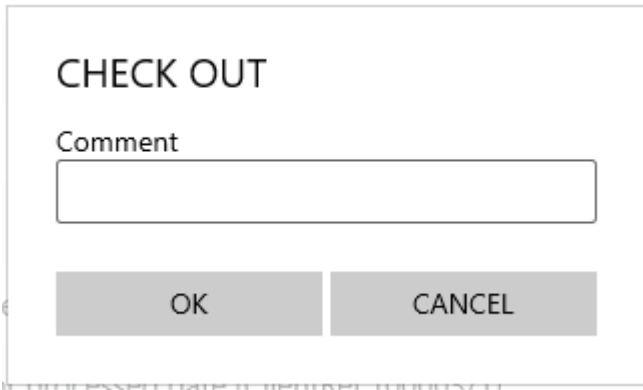
To check out a document, Navigate to Case Management and select the Documents tab.



Right-click the desired document, and select Check Out



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



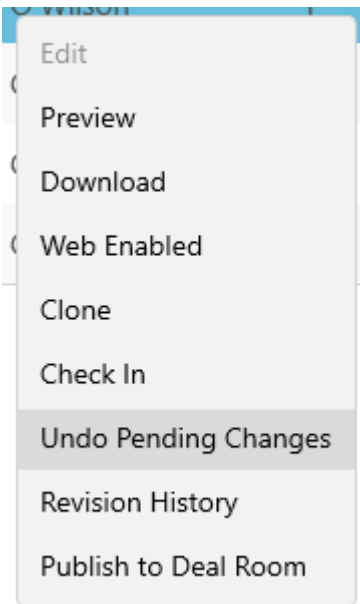
Word will now open, allowing you to continue editing the document.

## 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.



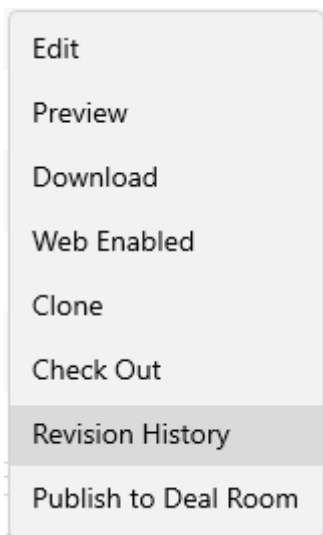
Comment

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	Created by	Created Date
2	Dan2	28/12/2023

**Comment**  
Amendments to 2nd paragraph

---

Version	Created by	Created Date
1	dan	01/12/2023

**Comment**

Preview  
Download

---