



Osprey Approach: Checking Out a Document for Editing

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

The latest version is always online at
<https://support.ospreyapproach.com/?p=60877>

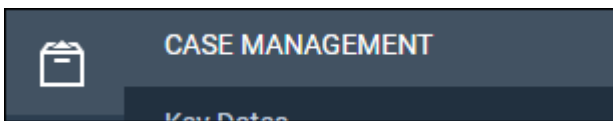


This is a step-by-step guide showing users how to check out a document for editing

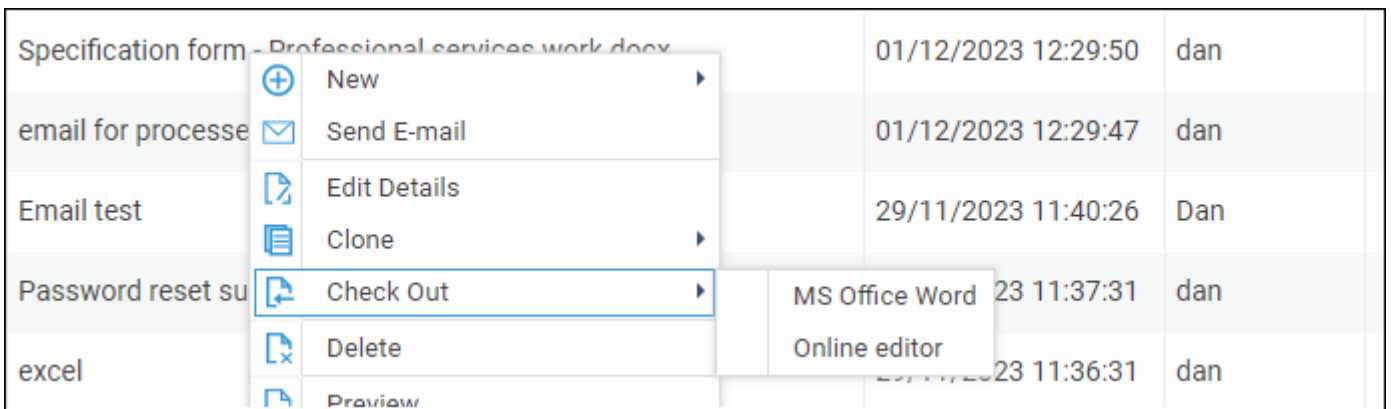
Osprey's check out functionality allows you to "check out" a document for editing, preventing other users from also making amendments, and keeping a history of revisions available for preview and downloading.

Checking out

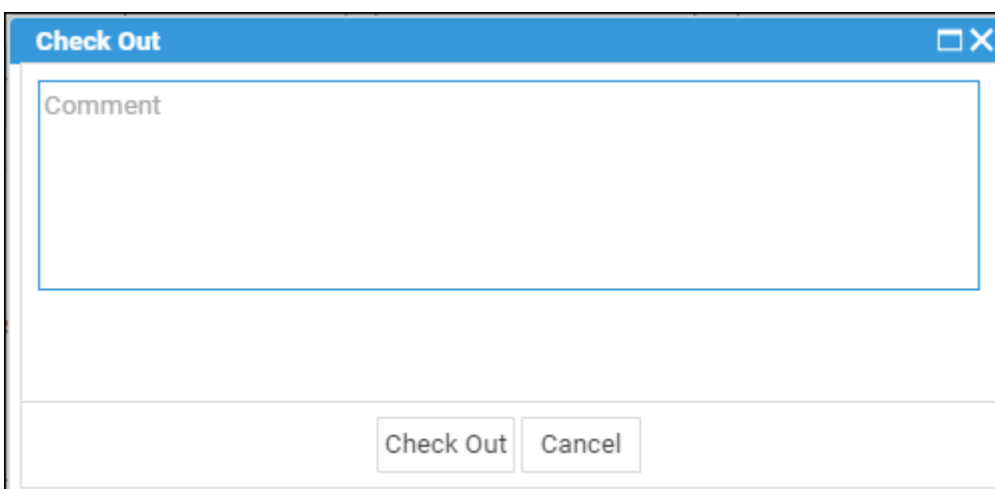
To check out a document, navigate to the matter history by selecting Case Management.



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 will display within the Items Details pane.

The screenshot shows the 'Item Details' pane with three tabs: 'Item Details', 'Security', and 'Revision History'. The 'Item Details' tab is active. Below the tabs is a toolbar with icons for 'Modify', 'Undo Pending Changes', 'Download', and a user profile icon. The main content area is divided into two sections: 'General Info' and 'Checked Out Info'. The 'General Info' section contains the following details:

Ref Number	119942
Client No	100003 (O'Wilson)
Matter No	1 (Purchase 6 Anfield Road)
Folder Path	Matter History/____Conevyacning
Custom Type	
Web Enabled	No
Details	Specification form - Professional services work.docx

The 'Checked Out Info' section contains the following details:

Checked Out By	dan
Checked Out Date	28-12-2023 13:37:21
Comment	

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

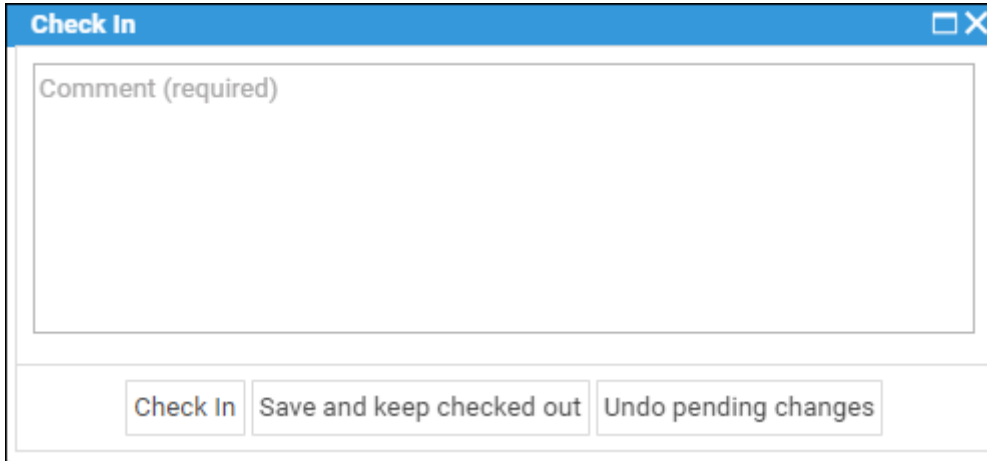
The screenshot shows a right-click context menu for a document. The menu items are: 'New', 'Send E-mail', 'Edit Details', 'Clone', 'Modify', 'Undo Pending Changes', 'Delete', 'Preview', and 'Download'. The 'Modify' option is highlighted, and a sub-menu is open showing 'MS Office Word' and 'Online editor'.

Other users who try to modify this document will have these actions greyed out, preventing any other users from making changes until the document is checked back in.

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.



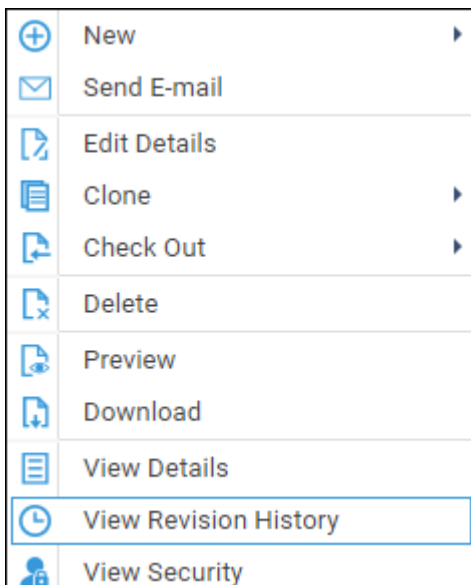
The screenshot shows a 'Check In' dialog box. It features a blue header with the text 'Check In' and standard window control icons (minimize, maximize, close). The main area contains a text input field with the placeholder text 'Comment (required)'. At the bottom of the dialog, there are three buttons: 'Check In', 'Save and keep checked out', and 'Undo pending changes'.

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

If you wish to save your progress but keep the document in a checked-out state, select Save but keep checked out.






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.

Item Details		Revision History					
Download							
TYPE	NAME	VERSION	SIZE	CREATED BY	CREATED DATE	COMMENT	
	Specification for...	3	12.11 Kb	dan	28/12/2023 13:40:47	Further Amendments to paragraph ...	
	Specification for...	2	12.11 Kb	Dan2	28/12/2023 13:25:17	Amendments to 2nd paragraph	
	Specification for...	1	16.78 Kb	dan	01/12/2023 12:20:50		

-  Preview
-  Download
-  Refresh