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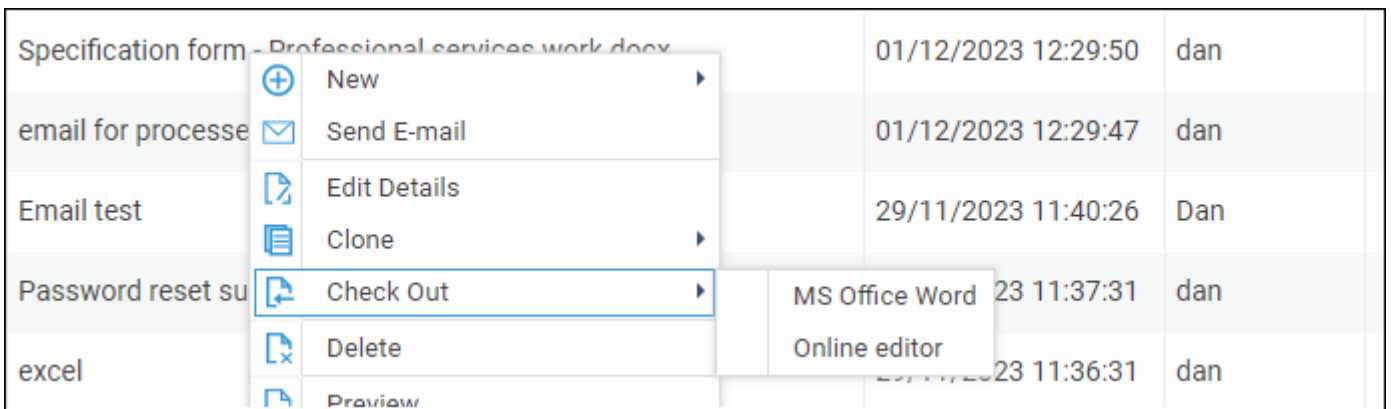
Osprey's check out functionality allows you to "check out" a document for editing, preventing other users from also making amendments, and keeping a history of revisions available for preview and downloading.
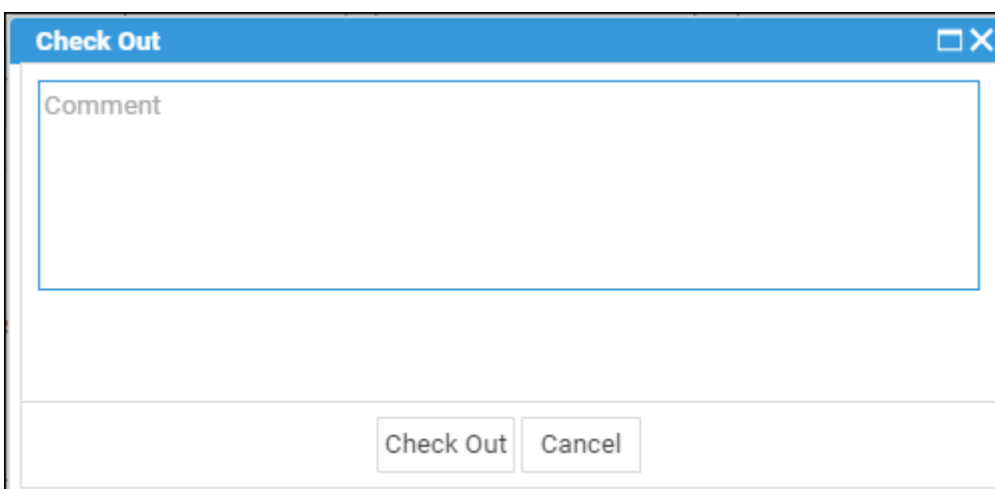
Checking out

To check out a document, navigate to the matter history by selecting Case Management.
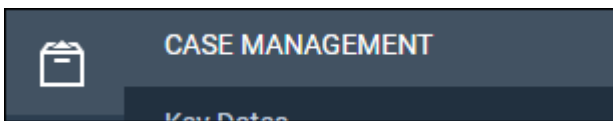
Right-click the desired document, and select Check Out

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.

If you right-click this document again, you will see a new set of options.
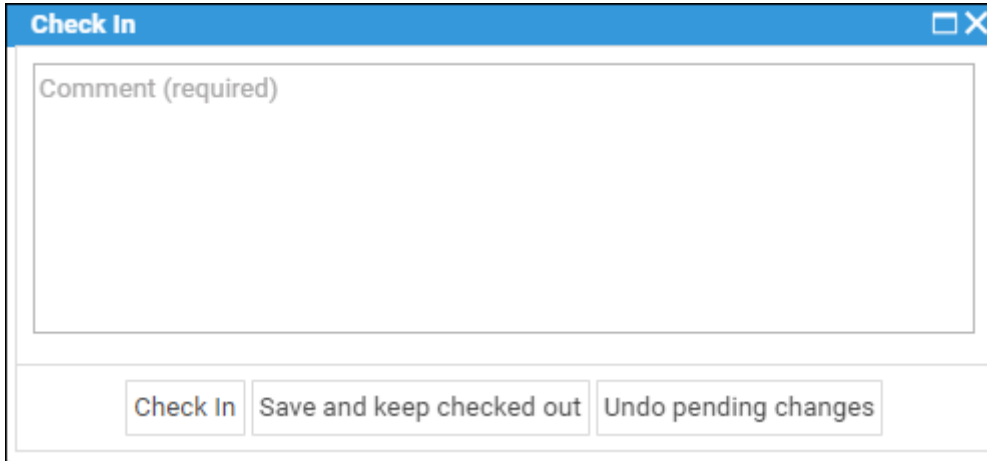
Other users who try to modify this document will have these actions greyed out, preventing any other users from making changes until the document is checked back in.

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.

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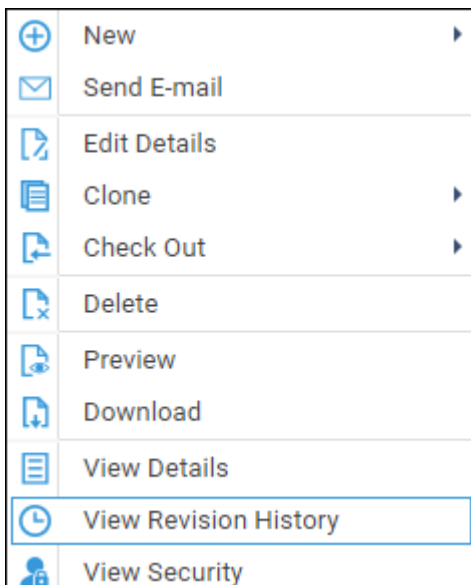
A history of the amendments to the document will be visible, along with any comments.

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 12:29:50	

Preview
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