

# Osprey Approach: Produce a Document and Save with Time Recording (Browser)

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The latest version is always online at  
<https://support.ospreyapproach.com/?p=53167>

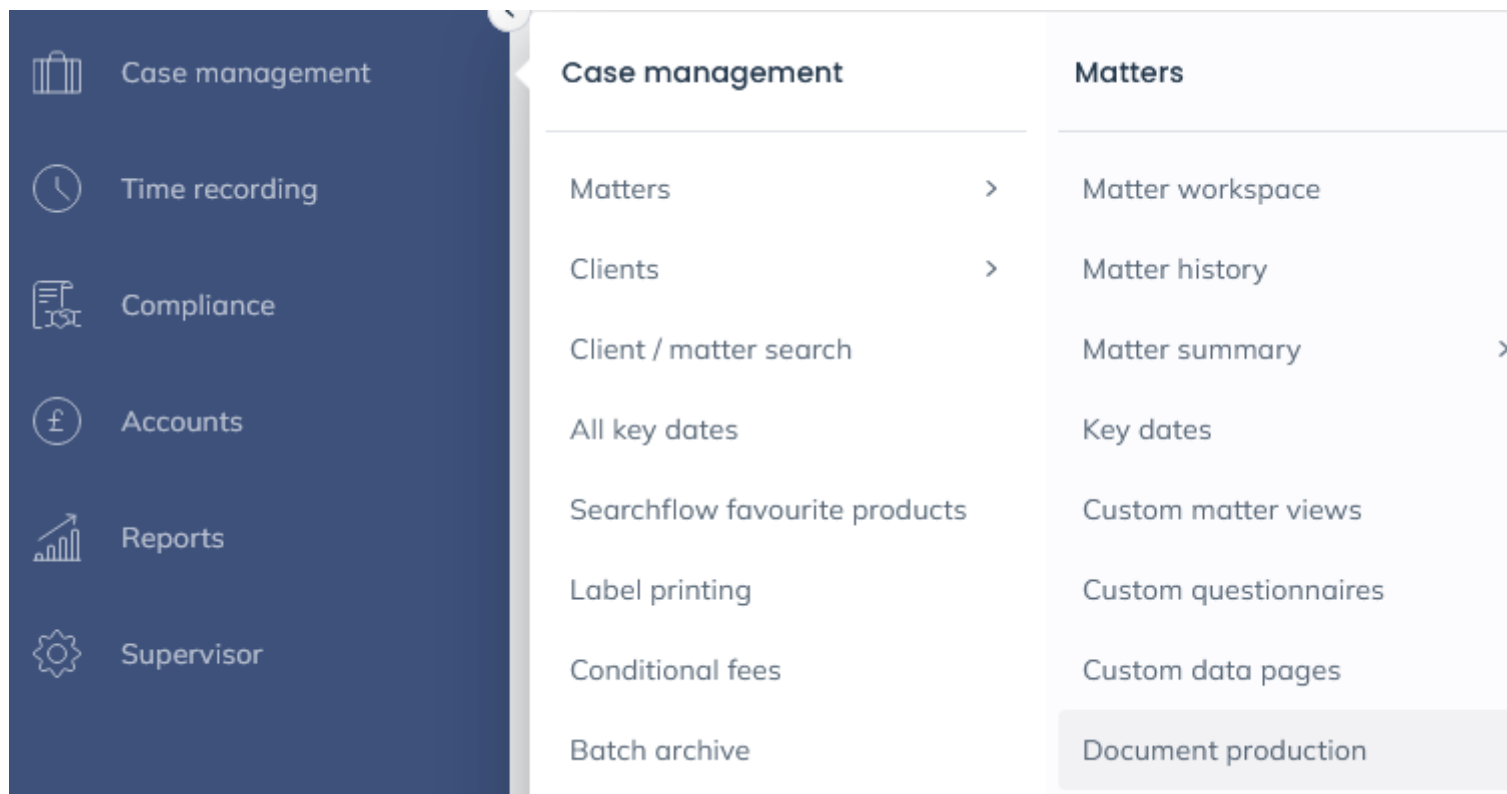


# This guide will show you how to produce a document and time record when saving it

To generate documents from Osprey Browser, you will need to have the Osprey Gateway installed.

## Produce a Document

To produce a document, load the relevant client, then navigate to Case Management > Matters > Document Production. Or go to the +New Button > Document > Document.



WAR0004-1 Peter Ward 24h 3m + NEW

Purchase of 28 Elm Road

- Document
- Lexis form
- DocuSign request
- Conflict of interest search
- Client
- Matter
- Document >
- Email
- SMS
- Key date
- Requisition

Use the filters to locate the document you wish to run.

**FILTER BY** ▾

Expert Type (None) ▾

Document Type Standard ▾

Description Search:  🔍

Include Global

- **Expert Type** - Filters down to show all documents assigned to that Expert Type.
- **Document Type** - Select the relevant document type, i.e. Standard Letter, PDF, Excel or General
- **Description search** - Locate document via name. This box utilizes a "wildcard" search. The wildcard search is ".." which replaces text e.g. if you were searching for a Blank Client Letter, you could search for "Bla..", "..Letter" or "..Client.." and the document would return.
- **Include Global** - Include non-work type specific documents.

Left click on the document you wish to generate. Word should now open.

If you do not have the gateway installed, you may right-click and choose Run Template > Online Editor.

Make any changes needed to the document and print it (if necessary). Close the document using the 'X' in the top-right corner.

Saving a Document

You have three options for Time Recording.

To post the default letter rate simply select 'Save' with Automatic Time Record selected.

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**Your Document is ready for upload. Press 'Save' to keep your changes or 'Cancel' to discard them.**

File Description:	<input type="text" value="File Review"/>
Folder:	<input type="text" value=""/> <a href="#">...</a>
Custom Type:	<input type="text" value="Please select..."/> ▼
Retention Period:	<input type="text" value="Please select..."/> ▼
Retention Date:	<input type="text" value=""/> ▼

*If left blank, this will default to the Document description.*

Automatic Time Record (Untick to enter time recording manually)

If you wish not to post a time entry select Save with No Time Record.

If, however, you wish to post your own time entry, untick Automatic Time Record. A posting screen will now appear to allow you to enter the details manually. Once you have completed the posting form, select Save.

Your Document is ready for upload. Press 'Save' to keep your changes or 'Cancel' to discard them.

File Description:

Folder:

Custom Type:

Retention Period:

Retention Date:

If left blank, this will default to the Document description.

Automatic Time Record (Untick to enter time recording manually)

Fee Earner:

Posting Date:

Remun ID:

Activity:

Rate:  Hourly Rate

Time:  (mins)

Value:  [Recalculate](#)

Detail:

Time Keeper Grade Code:

Phase / Task Code:

Activity Code:

Attendance Note:

[Show Attendance Text](#)  Include Global

Documents and Workflows can be run from within Word directly using our Word Add-ins [Osprey Office 365 Word Add-in](#) or [Osprey Office Add-in](#)