



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

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The latest version is always online at
<https://support.ospreyapproach.com/?p=2461>

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This guide will show you how to produce a document in the case management app and time record when saving it

You can produce a document and time record when saving.

Produce a Document

The screenshot displays the OSPREY BROWSER interface. At the top, it shows 'Today's Units: 0', 'Today's Time: 00h:00m', and 'Today's Value: £0.00'. A search bar contains 'Global search'. The main header indicates 'Home - C00009/1 (Chegg STC Scott/Test) FE: TOMG WT: FW_RCP'. The left sidebar lists navigation options: OSPREY BROWSER, OSPREY HOME, CLIENT & MATTERS, TIME RECORDING, CASE MANAGEMENT, CLIENT LEDGERS, BANKS & JOURNALS, REPORTS, and SUPERVISOR. The main content area is divided into two sections: 'MATTERS FOR REVIEW' and 'YOUR KEY DATES'.

MATTERS FOR REVIEW

CLIENT	MATTER	CLIENT NAME	MATTER DESCRIPTION	F/E	REVIEW DATE	TYPE	PERIOD	TIME LMD	LMD	SUP F/E
W00003	4	Woods Richard R A	Bill Test	TOMG	10/04/2019		0		13/02/2020	●
C00009	16	Chegg Scott STC	Testing	TOMG	11/12/2019		1825		26/11/2019	●
C00009	17	Chegg Scott STC	test matter	TOMG	21/12/2019		0		10/12/2019	●
TE0001	2	Test 05 John J	Purchase of Test 05, T	TOMG	04/03/2020		0		19/02/2020	●
TE0003	1	Test 05 John J	Purchase of Test 05, T	TOMG	04/03/2020		0		19/02/2020	●
TE0003	4	Test 05 John J	Purchase of Test 05, T	TOMG	04/03/2020		0		19/02/2020	●
TE0003	5	Test 05 John J	Purchase of Test 05, T	TOMG	04/03/2020		0		19/02/2020	●
TE0003	6	Test 05 John J	Purchase of Test 05, T	TOMG	04/03/2020		0		19/02/2020	●
TE0003	7	Test 05 John J	Purchase of Test 05, T	TOMG	04/03/2020		0		19/02/2020	●
TE0003	8	Test 05 John J	Purchase of Test 05, T	TOMG	04/03/2020		0		19/02/2020	●

YOUR KEY DATES

CLIENT	MATTER	CLIENT NAME	MATTER DESCRIPTION	F/E	KEY DATE	TYPE	NOTES	SUP F/E
C00009	1	Chegg Scott STC	Test	TOMG	17/07/2022	CHASECLI	Client sign/return client care pack	●
C00009	1	Chegg Scott STC	Test	TOMG	20/07/2022	REMINDER	Chase contract pack	●

Tap Clients & Matters > Document Production

A Bill Template

Work type - GLOBAL

A Blank Client Letter (Company)

Work type - GLOBAL

A Blank Client Letter (Individual)

Work type - GLOBAL

A Client Care Guide

Work type - GLOBAL

A Client Profile

Work type - GLOBAL

A Fixed Fee Conveyancing Quotation

Work type - GLOBAL

A Fixed Fee Quotation - Company

Tap the document to run

Whilst the document is on screen, the app will be locked until the document is closed to prevent the loss of documents. Attempting to use the app will result in either of the following messages.

Warning

Cannot change client/matter while a document is opened for editing

Ok

Warning

A document is already opened for editing.

Ok

Cancel

Other Document Types

STANDARD LETTERS LEXIS NEXIS FORMS PDF

Expert Type

(None) ▾

Search Description

Search

Include Global

DESCRIPTION
Form AP1
Form TR1

Tap PDF

You may tick Include Global to show global templates

Tap the document to run

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

Saving a Document

Using Internet Explorer

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

File Description:

EA - Notification of Completion

Folder:

...

Custom Type:

Please select... ▾

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

Automatic Time Record (Untick to enter time recording manually)

Save

Save with no time record

Cancel

Over-type the File Description > Select ... to choose a Matter History Folder > Select an appropriate type

Using the Case Management App



Save With Time Recording

Save Without Time Recording

Template

A Bill Template

Folder

- Matter History
 - Client correspondance
 - Key Documents
 - Scanned Documents

Custom Type

Please select...

Description

A Bill Template

Retention Period

Please select...

Automatic Time Recording

Select choose a Document Folder > Select an appropriate type > Over-type the Description

You have three options for Time Recording.

To post the default letter rate simply select 'Save'. If you wish not to post a time entry select 'Save with No Time Record'(Save Without Time Recording).

If, however, you wish to post your own time entry, untick the 'Automatic Time Record' box (Tap Automatic Time Recording).

A posting screen will now appear to allow you to enter the details manually. Once you have completed the posting form, select 'Save'.



Save With Time Recording

Save Without Time Recording

Automatic Time Recording



Fee Earner

Dave Dingle

Date

04/01/2021

Remuneration

Standard Rate (£180)

Activity

ATC - Attending Client



Hourly Rate

100.00

Units of Time Value

0

0.00

Detail

ATC - Attending Client

Time Keeper Grade Code

A

Phase / Task Code

Select

Activity Code

Select

Attendance Note

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](#)