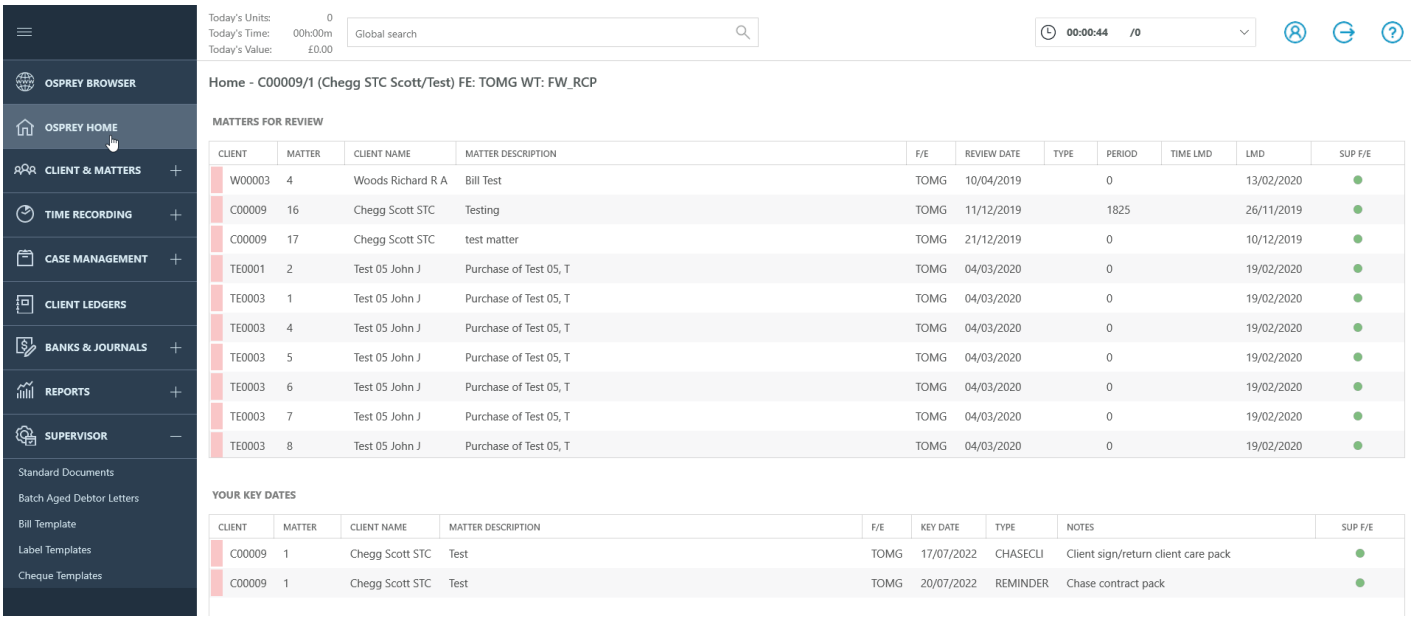
Osprey Approach: Produce a Document and Save with Time Recording (App)

This help guide was last updated on
Dec 27th, 2023

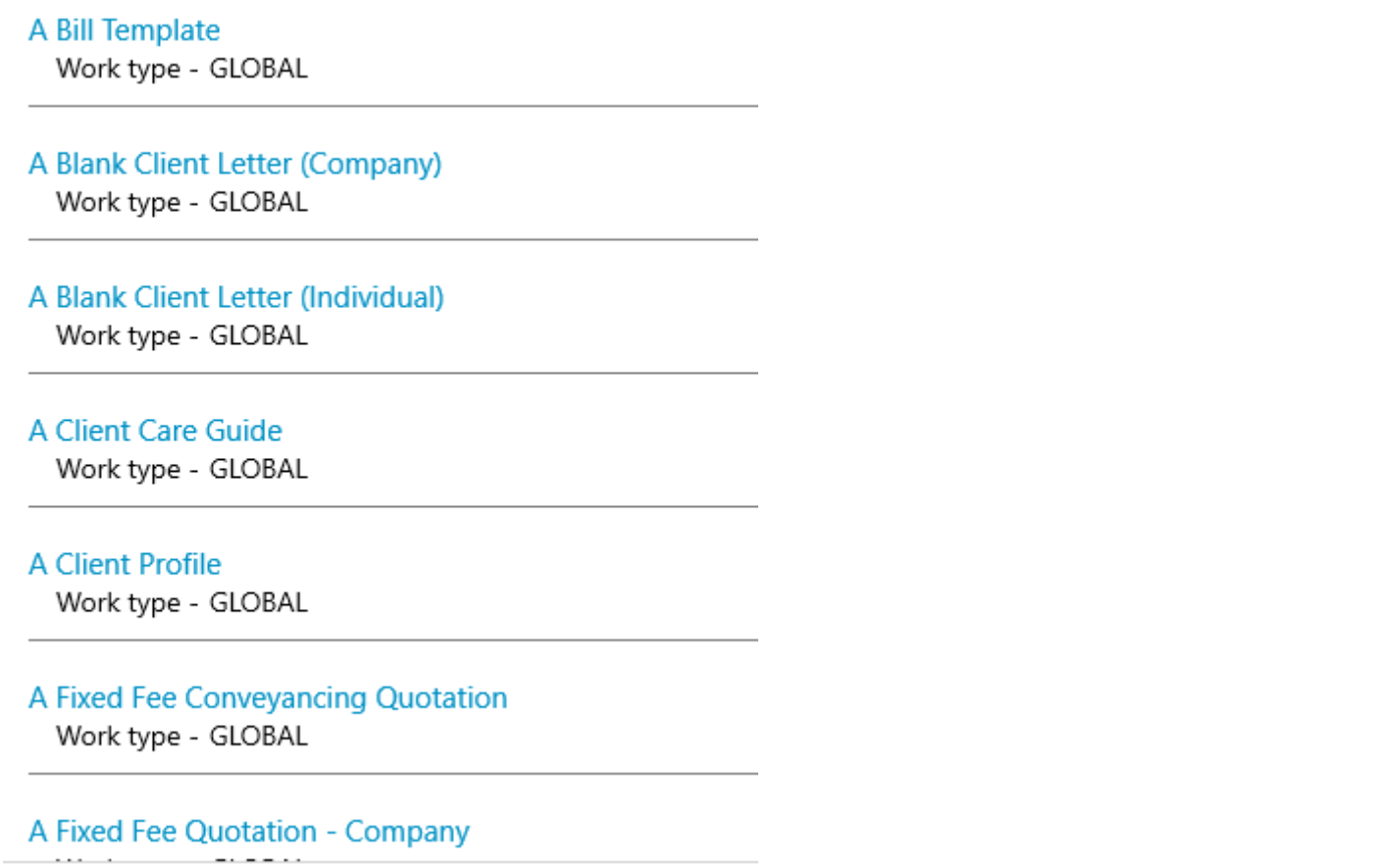
The latest version is always online at
https://support.ospreyapproach.com/?p=2461

You can produce a document and time record when saving.

Produce a Document

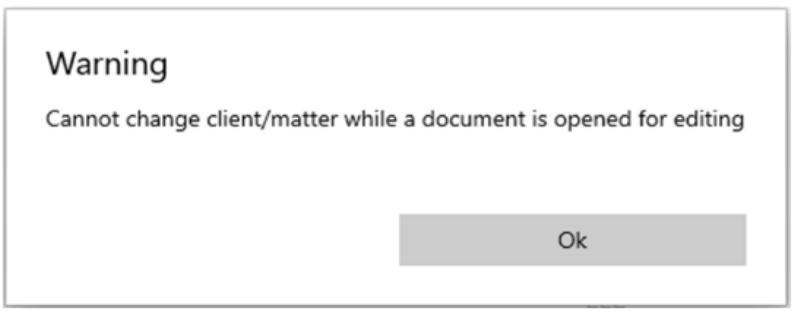


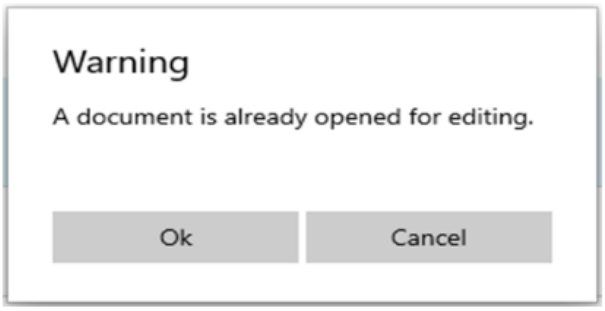
Tap Clients & Matters > Document Production



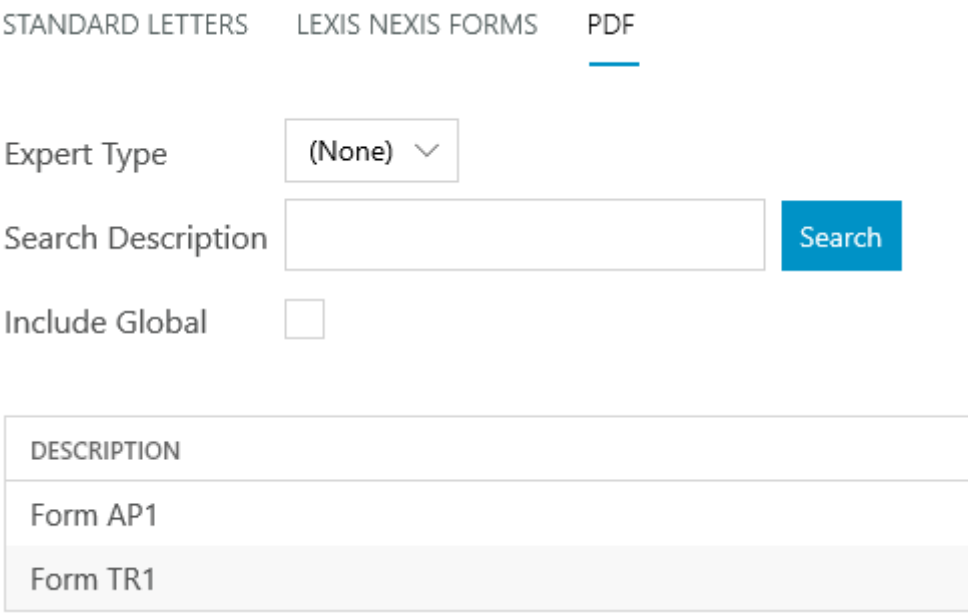
Tap the document to run

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.





Other Document Types



Tap PDF

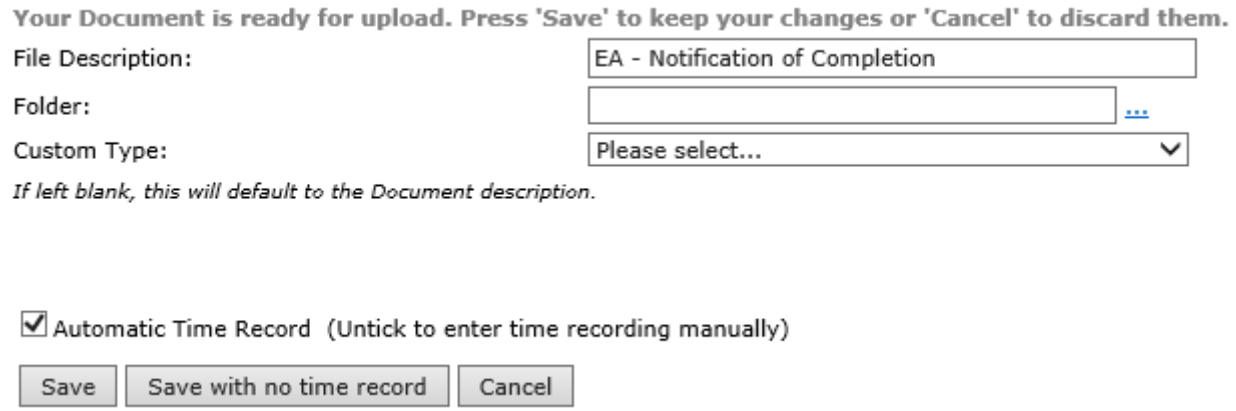
You may tick Include Global to show global templates

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

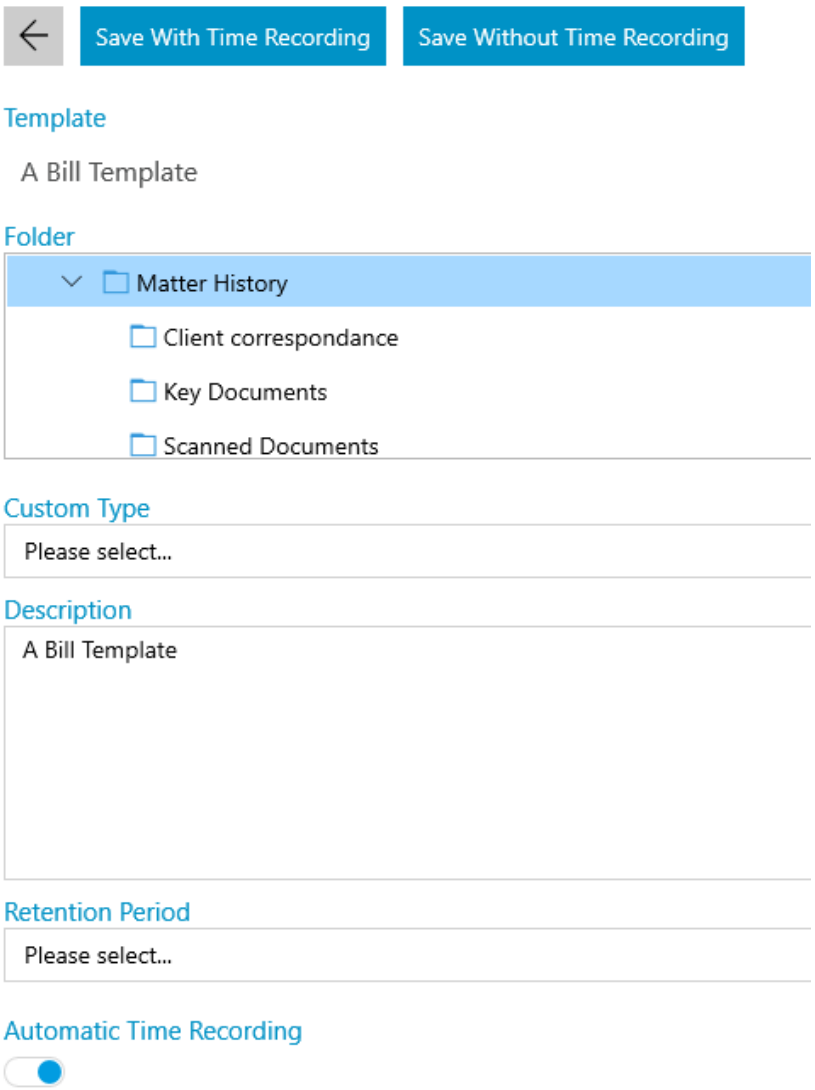
Saving a Document

Using Internet Explorer



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

Using the Case Management App



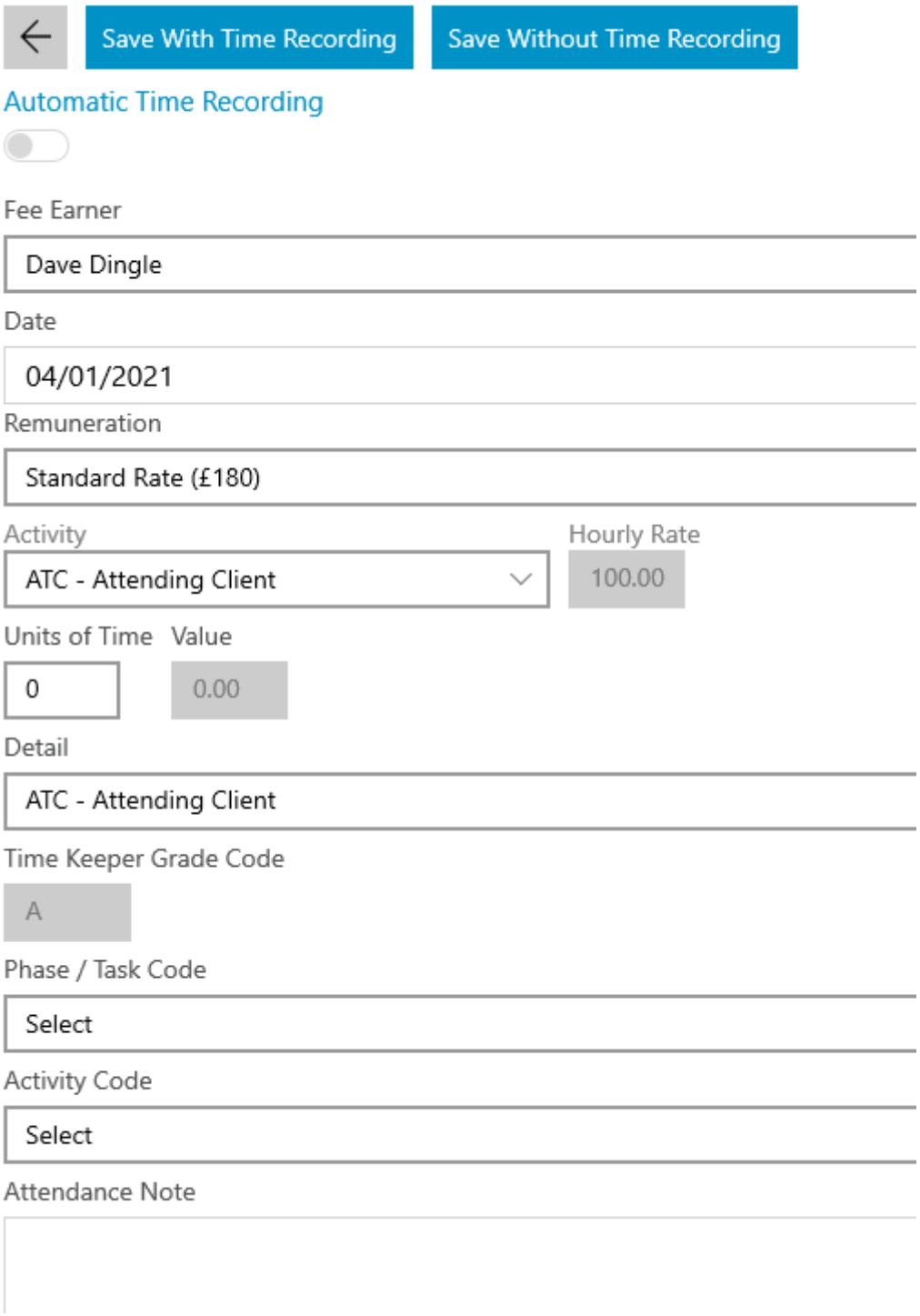
Select choose a Document Folder > Select an appropriate type > Over-type the Description

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’.



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