



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

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS

+

TIME RECORDING

+

CASE MANAGEMENT

+

CLIENT LEDGERS

BANKS & JOURNALS

+

REPORTS

+

SUPERVISOR

-

Standard Documents

Batch Aged Debtor Letters

Bill Template

Label Templates

Cheque Templates

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

00:00:44 / 0

Home - C00009/1 (Chegg STC Scott/Test) FE: TOMG WT: FW_RCP

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:	<input type="text" value="EA - Notification of Completion"/>
Folder:	<input type="text" value="..."/>
Custom Type:	<input type="text" value="Please select..."/>

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

☒ Automatic Time Record (Untick to enter time recording manually)

<input type="button" value="Save"/>	<input type="button" value="Save with no time record"/>	<input type="button" value="Cancel"/>
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Over-type the File Description > Select ... to choose a Matter History Folder > Select an appropriate type

Using the Case Management App

<input type="button" value="←"/>	<input type="button" value="Save With Time Recording"/>	<input type="button" value="Save Without Time Recording"/>
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Template

A Bill Template

Folder

▼	<input type="checkbox"/> Matter History
	<input type="checkbox"/> Client correspondence
	<input type="checkbox"/> Key Documents
	<input type="checkbox"/> Scanned Documents

Custom Type

<input type="text" value="Please select..."/>

Description

<input type="text" value="A Bill Template"/>
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Retention Period

<input type="text" value="Please select..."/>

Automatic Time Recording

<input checked="" type="checkbox"/>

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](#)