

# Osprey Approach: The Online Editor

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The latest version is always online at  
<https://support.pracctice.com/?p=765>

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## Who is this guide for?

Any Users

If you wish to run documents through Osprey using Edge, Firefox or Chrome, you can use the built-in Online Editor to allow you to run and amend your documents.

### Step 1

The Online Editor ensures that Osprey is multi-browser compatible. Whether you use Edge, Chrome or Firefox, the editor will allow you to run and save documents while also offering the flexibility of having multiple templates open at the same time.



You will also be able to use a MAC machine as the Online Editor will allow you to open Osprey documents using Safari.

With the editor open, you may also navigate to other areas of Osprey if necessary.

You only need to be within the Document Production or Matter History areas at the point of saving.

For Internet Explorer users, when running a new template or editing a saved document, you may choose to either use your local copy of MS Word (via the Silverlight plugin) or use the Online Editor.

In this example, we will open a document from the Document Production area of the Case Management tab, but you will be able to use the editor wherever a document can be opened.

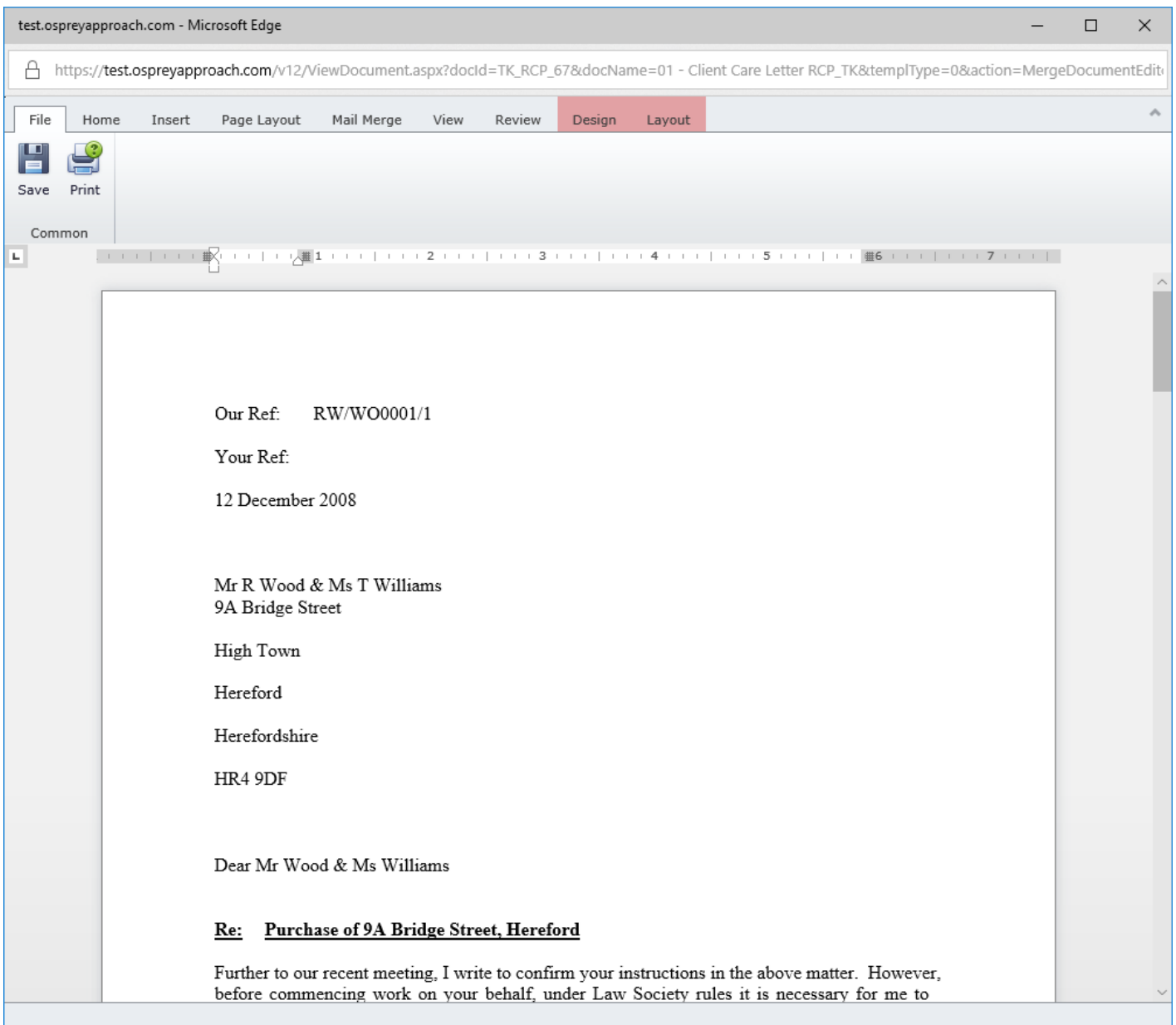
### Step 2

Right-click on the document you wish to open and select the 'Run Template' option.

DESCRIPTION	↑	EXPERT TYPE	RETENTION PERIOD	COPY TO CLIENT	COPY TO ASSOCIA	SELECT
01 - Client Care Letter RCP_TK			1 month	N	N	✓
02 - Terms & Conditions RCP_TK	Run template	MS Office Word		A	N	✓
		Online editor				

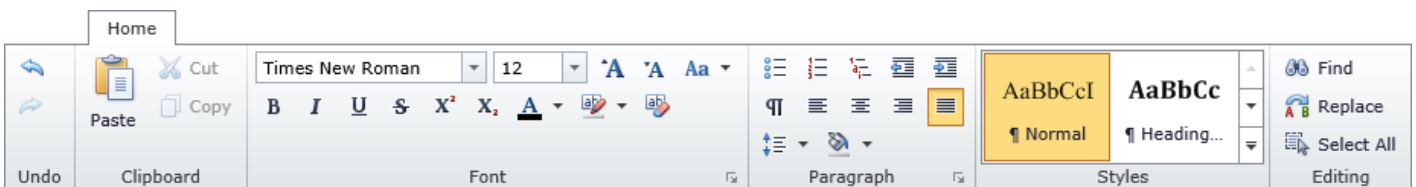
You now have the option to choose whether you wish to use MS Word or the Online Editor. Left click on the Online Editor.

Once selected, a new window will open displaying your selected document.



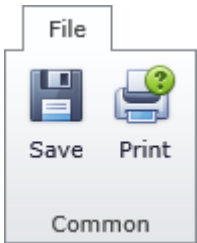
### Step 3

Similar formatting options are available to you as you would see in Microsoft Word, in the below screenshot, we can see the 'Home' tab.



### Step 4

To save your document, select the 'Save' icon available within the 'File' tab. If saving through 'Document Production' you will now be able to time record as you normally would.



### Step 5

When you wish to open a document in the Matter History using the Online Editor, right-click on the document to select it and then click on the 'Check Out' option.

From here, you will again be able to select whether you use MS Word or the Online Editor.

FAVORITE	TYPE	REF NUMBER	CLIENT NO	CLIENT SURNA...	MATTER NO	MATTER DESCRIP...	RETENTION PERIOD	DETAILS	CREATED DATE	CREATED BY
All										
★		164295	W00001	Wood	1	Purchase of OA		Blank Letter to Client	22/02/2018 17:11:37	richard

- New
- Send E-mail
- Edit Details
- Clone
- Check Out
  - MS Office Word
  - Online editor
- Delete
- Preview
- Download
- View Details
- View Revision History
- View Security
- Subscribe to Notifications
- Unsubscribe All Notifications
- Add Retention Policy
- Change Owner
- Publish to Deal Room
- Finalize Version
- Refresh