

Osprey Approach: The Online Editor

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

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If you are on windows, you can make use of our Osprey Gateway or Case Management app to produce your documents through Microsoft Word. If for any reason you are unable to do this (using a chromebook/apple computer), then you will be able to make use of the Online Editor.

The Online Editor

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.

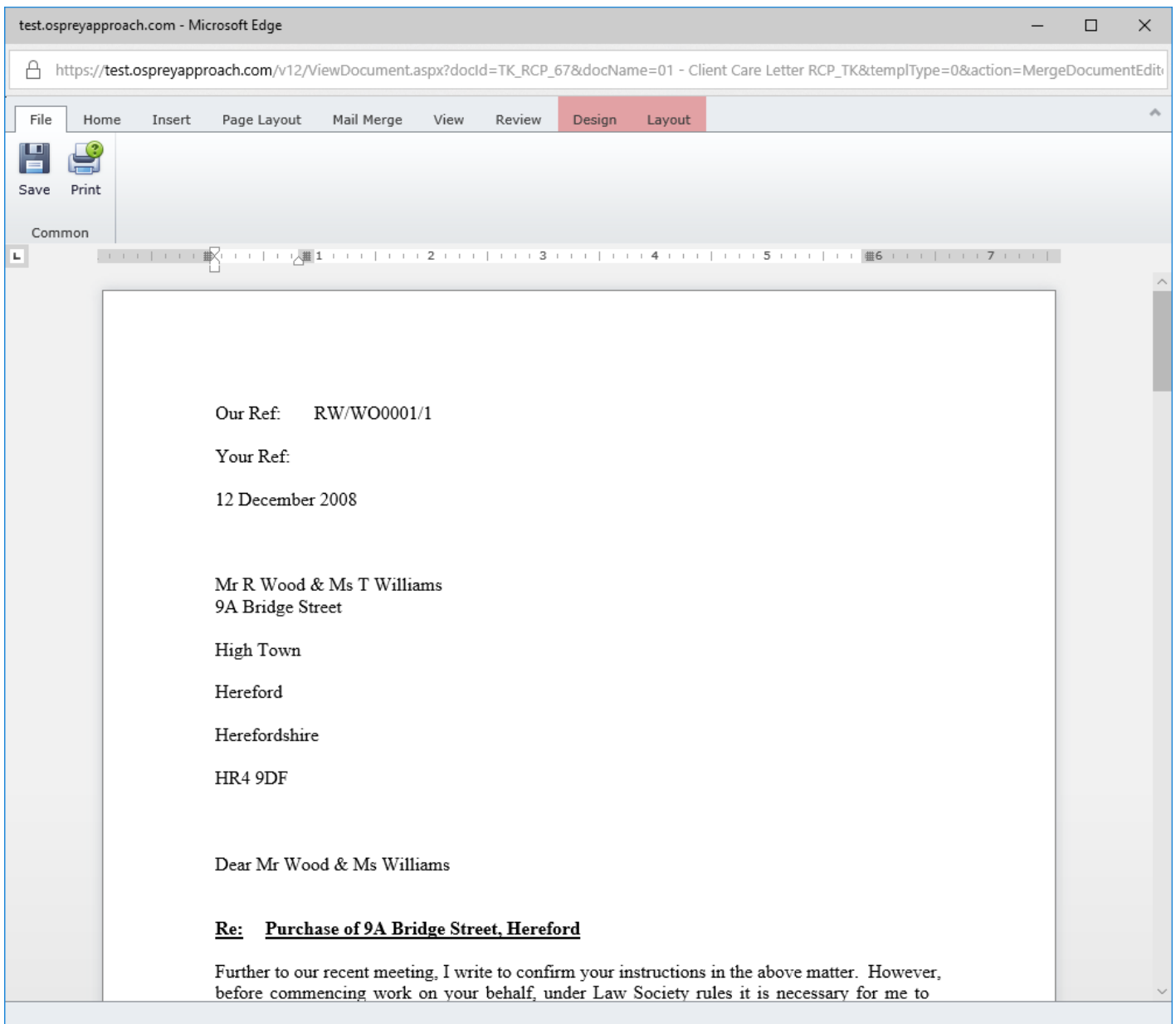
In this example, we will open a document from the Document Production area of the Case Management tab, but you will be able to use the editor wherever a document can be opened.

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

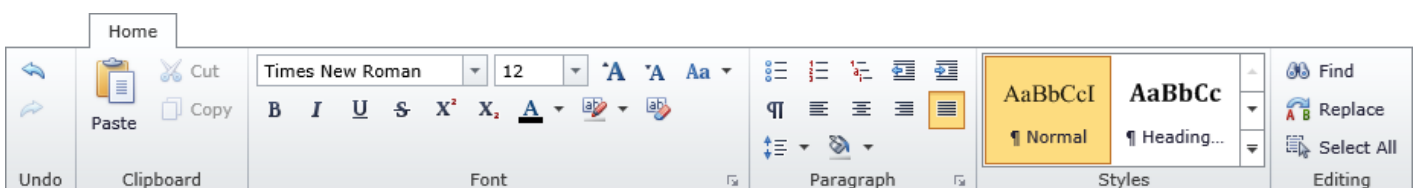
| DESCRIPTION | ↑ | EXPERT TYPE | RETENTION PERIOD | COPY TO CLIENT | COPY TO ASSOCIA | SELECT |
|--------------------------------|--------------|---------------------------------|------------------|----------------|-----------------|--------|
| 01 - Client Care Letter RCP_TK | | | 1 month | N | N |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

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

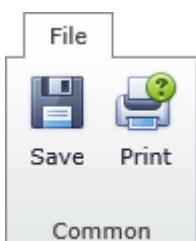
Once selected, a new window will open displaying your selected document.



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



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.



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 0A | | Blank Letter to Client | 22/02/2018 17:11:37 | richard |

New

Send E-mail

Edit Details

Clone

Check Out

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

MS Office Word

Online editor