



# Osprey Approach: Improving your Osprey experience

This help guide was last updated on  
Jul 7th, 2021

The latest version is always online at  
<https://support.ospreyapproach.com/?p=34691>



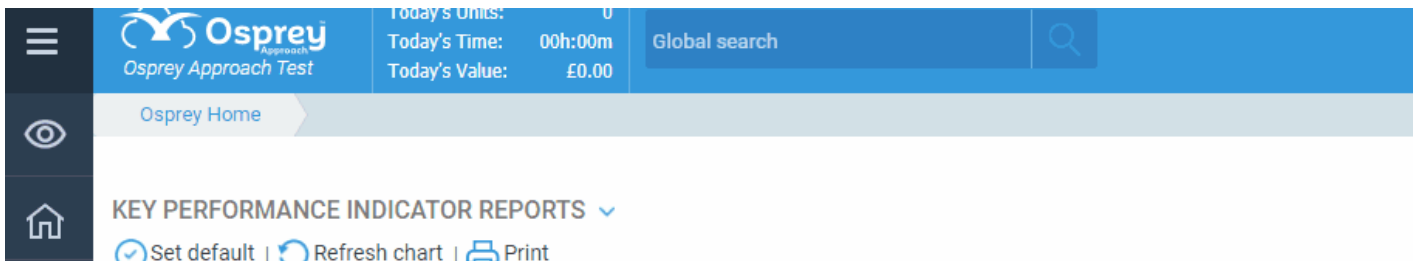
We're always striving to improve Osprey and we're continuously working hard to streamline and improve the navigation between the Osprey tools.

Providing the best user experience is only achieved by understanding how you use Osprey. We know many customers use a mixture of tools and devices - browser, apps, desktop and mobile - throughout their day to effectively complete their tasks and we want to make sure you get the best possible experience no matter how you work.

From your feedback we've launched a couple of **new features that'll help make it easier to navigate Osprey** so you can use the tools you find appropriate for your tasks. Discover more about the new features below.

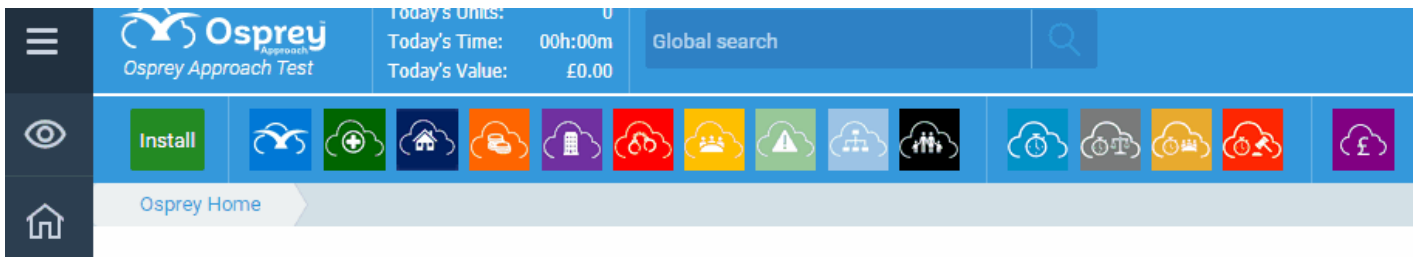
## Focus On

Once you are in Osprey you will see the "Focus On" option in the left hand menu. Click on this to reveal a panel at the top of the screen



## Install the Apps Through the Browser

You may install the Case Management, Time Recording and Cheque Requisition apps through the Browser as an alternative to the Microsoft Store.



Click Install

This will bring up a set of instructions on installing the Apps. Click "OK" to begin the download.

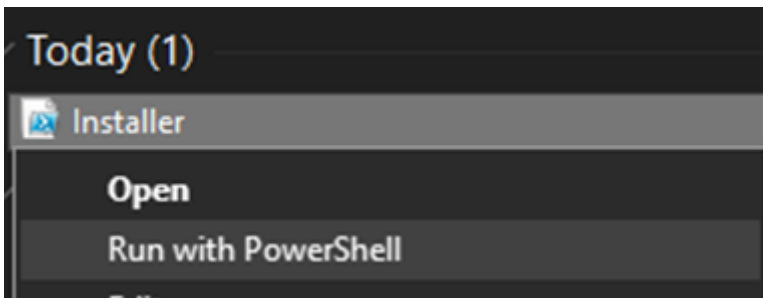
test.ospreyapproach.com says

To install the applications please refer to the following steps:

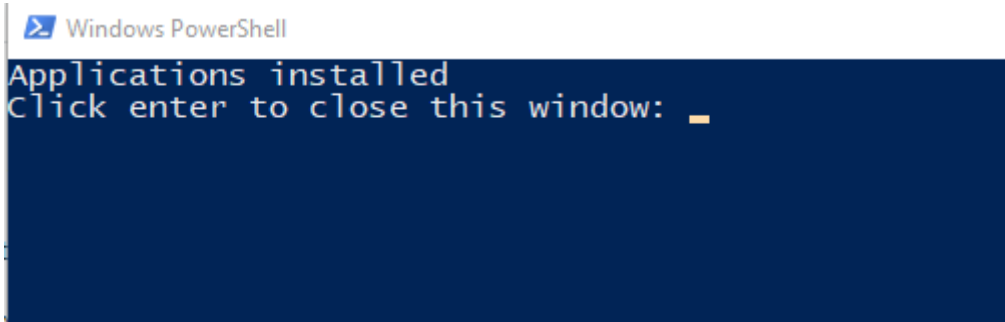
- 1: Locate the downloaded script file.
- 2: Right click the file.
- 3: Select 'Run with PowerShell'.



Locate the file you just downloaded, and run this with PowerShell by right clicking on the file and pressing "Run with PowerShell".



PowerShell will open up and begin installing the apps. Upon completion a message will show in PowerShell stating the applications have been installed.



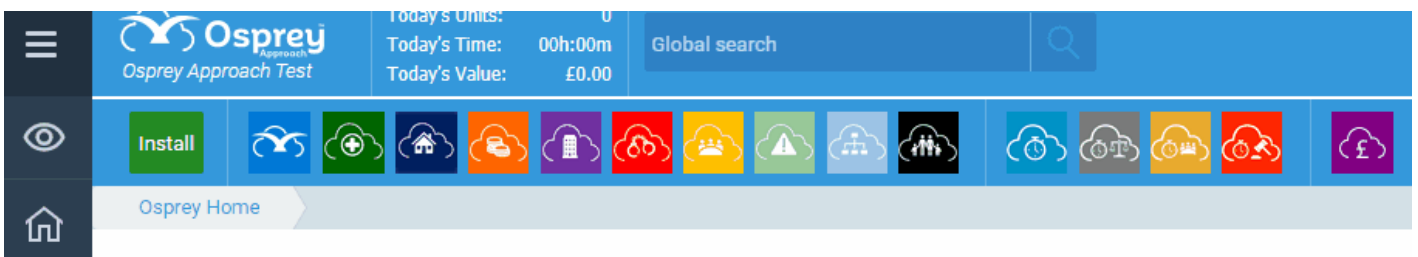
Now you will have access to all the apps on your computer.

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## Use Single Sign on Functionality

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Single sign on ensures you don't have to sign into Osprey each time you open this apps. This can be used to navigate seamlessly between the browser and the apps.



Choose the app you wish to load, hovering over the app icon will show you the name of the app you are going to load. Clicking the app will then open the desired app, and you will already be signed in.

## Data Sync

If you're working on a client in the browser you can navigate to an app and be presented with the same client and data automatically

The screenshot displays the Osprey Approach Test interface. At the top, there is a header with the Osprey logo, 'Osprey Approach Test', and a 'Global search' bar. Below the header is a navigation bar with various app icons. A red circle highlights the breadcrumb 'ARCHIVED/PROSPECT: B00002/9 (Braithwaite Neil) FE:ADAMB WT:ADMLAW Prospect matter'. Below the navigation bar is a 'CLIENT & MATTER SEARCH' section with a dropdown arrow. Underneath, there are links for 'Client Search', 'Dossier Search', 'CRM Search', 'Send e-mail', 'Client Dossier', and 'SMS'. The search form contains the following fields:

Client No:	<input type="text" value="B00002"/>	<input type="button" value="Load Client/Matter"/>
Matter No:	<input type="text" value="9"/>	
Name:	<input type="text" value="Braithwaite"/>	<input type="button" value="Search"/>
Matter:	<input type="text" value="Prospect matter"/>	<input type="button" value="Search"/>