

# Osprey Approach: Using the Case Management App (Mobile)

This help guide was last updated on  
Dec 21st, 2022

The latest version is always online at  
<https://support.ospreyapproach.com/?p=34876>

[Click here for a printer-friendly version](#)



You can use the Osprey Approach Case Management app on your iPhone or iPad in a similar way to how you use the desktop version of the app. In this guide, we will detail the differences in the iOS version.

Download the app from the App Store, open it up and login as you usually would.

11:23



URL

 <https://test.ospreyapproach.com/...>

Username

 tomg

Password



Log in



Remember me

By logging into this service I agree to be  
bound by the terms and conditions of  
Osprey Approach Agreement

This is the homepage on the app - your key dates are displayed here. At the bottom of the screen are the navigation buttons.

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Hello Tom Genever, welcome to Osprey Approach. Your keydates are below.

Date	23/01/2020
Client/Matter	S00127/1
Client Name	Sebastian Mellor Test
Description	COMPLETION
Details	Client DOB

Date	23/01/2020
Client/Matter	S00127/1
Client Name	Sebastian Mellor Test
Description	COMPLETION
Details	Client DOB




Date	23/01/2020
Client/Matter	S00127/1
Client Name	Sebastian Mellor Test
Description	COMPLETION
Details	Client DOB




Date	08/03/2021
Client/Matter	B00001/55
Client Name	Broom Mitzi M AR
Description	__MWTEST
Details	FrontRow Test



HomeClient/MatterCasesPositMore

To load up a file, press Client/Matter at the bottom and you will then see the search screen. Enter the search criteria and then click Search.

11:24   

LAST 10 ACCESSED


SEARCH

Client no.

Matter no.

Surname  
Broom

Matter description

More options 




You will see your list of search results returned - just press on the one you wish to open.


11:24



← Search results		
0000001/1	<a href="#">Description</a> Added by smart actions	<a href="#">F/E</a> MB
B00001/1	<a href="#">Description</a>	<a href="#">Ref. no:</a>
B00001/2	<a href="#">Description</a> Testing prospects	<a href="#">F/E</a> MB
B00001/3	<a href="#">Description</a> Another prospect	<a href="#">F/E</a> MB
B00001/4	<a href="#">Description</a> CONSAL - Prospect matter to...	<a href="#">F/E</a> MB
B00001/5	<a href="#">Description</a> CRIME WT -Police stations T...	<a href="#">F/E</a> MB
B00001/6	<a href="#">Description</a> CRIME WT - Mags OLI0136/2...	<a href="#">F/E</a> MB
B00001/8	<a href="#">Description</a> CRIME WT - CDM7 BDOM m...	<a href="#">F/E</a> MB

As with the browser/desktop app, you will be taken to the Matter Details overview. The three vertical dots in the top right hand corner will give you further menu options as shown in the next image.

 B00001/2 Tom Genever  

Workflow status bar 

**Matter Description**  
Testing prospects

---

**Branch**  
Bucharest - UserID 525587168795

---

**Department**  
Civil Department

---

**Fee Earner**  
Mitzi Broom

---

**Supervising Fee Earner**  
N/A

---

**Work Type**  
Residential Conveyancing Sale

---

**Private/Legal Aid**  
Private

---

**Remuneration Type**  
HIGH

---

**Debtor Limit**  
N/A






---

**Disbursement Limit**  
N/A

---

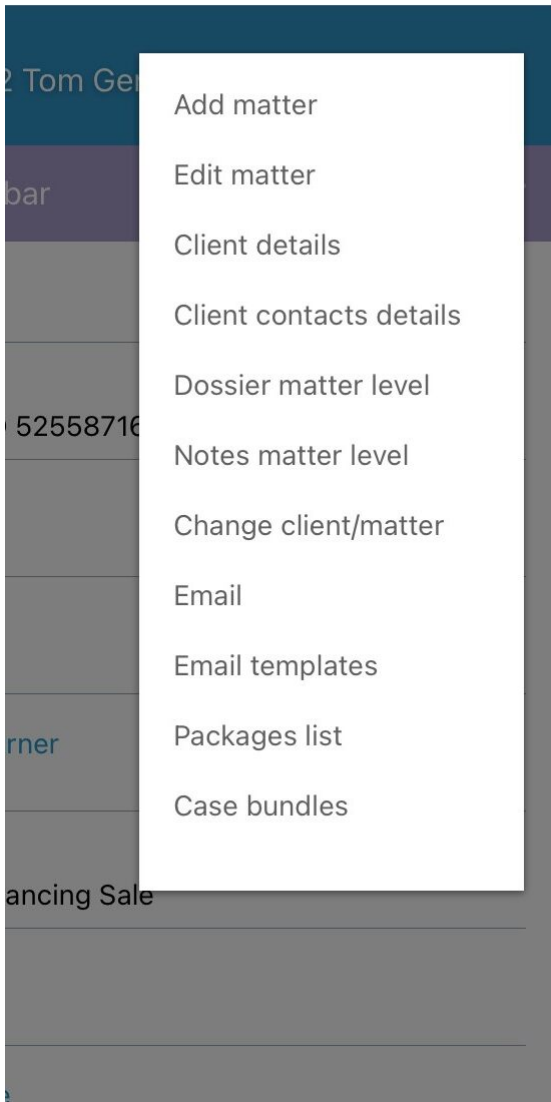
**WIP Limit**

---

Home Client/Matter Cases Posit More

From here you can change to client details, add/edit matters, fill in dossier pages etc.



By pressing Client details it will show you the client details screen as opposed to the matter details and will give you the option to add/edit client etc.



B00001/2 Tom Genever



Workflow status bar



Type

Individual

Title

Miss

Initials

M AR

Forename

Mitzi

Surname

Broom

E-mail

mitzi@pracctice.net

## Account Address

House

Suite 1, Falstaff House

Area

N/A

Postal Town

Malvern

Country

Worcestershire



Home



Client/Matter



Cases



Posit



More





B00001/2 Tom Ge

## Workflow status bar

## Type

Individual

## Title

Miss

## Initials

M AR

## Forename

Mitzi

## Surname

Broom

## E-mail

mitzi@pracctice.net

## Account Address

## House

Suite 1, Falstaff House

## Area

N/A

## Postal Town

Malvern

## Country

Worcestershire

Add individual client

Add company client

Edit client

Client contacts details

Matter details

Dossier client level

Notes client level

Email

Email templates

Change client/matter



Home



Client/Matter



Cases



Posit



More

If you press Cases at the bottom, you will see the case management section - workflows, documents and key dates.



B00001/2 Tom Genever



Workflow status bar



WORKFLOWS

DOCUMENTS

KEYDATES

Load Workflow

Remove all



Client Level Workflows



Global - not via Add-in 2(Global -...

Run



Send Welcome Text Message(Glo...



Completion(Global - Not via Add-i...



Send Welcome Text Message(Glo...



IHT 417(Global - Not via Add-in)



Certificate Chase - Repeater Task...



Home



Client/Matter



Cases



Posit



More

To view the matter history, press documents.



B00001/2 Tom Genever



Workflow status bar



WORKFLOWS

DOCUMENTS

KEYDATES



Password reset successfully.msg



Created Date: 26/04/2021

Ref No: 69161



Password reset successfully.msg



Created Date: 23/03/2021

Ref No: 66492



Demo Phases-Tasks.csv



Created Date: 11/03/2021

Ref No: 65843



Test.docx



Created Date: 11/03/2021

Ref No: 65842



Test Connector Tick



Created Date: 11/03/2021

Ref No: 65841



Test Connector



Home



Client/Matter



Cases



Posit



More

If you click the 3 vertical dots next to any time in the matter history, it will show you the option menu.

B00001/2 Tom Genever

Workflow status bar

WORKFLOWS DOCUMENTS KEYDATES

Password reset successfully.msg

Options

Preview

Check out

Online editor check out

Edit details

Revision history

Web enable

Delete

Clone

9161

Test Connector Tick

Created Date: 11/03/2021

Ref No: 65841

Test Connector

Home

Client/Matter

Cases

Posit

More

To add a new item to the matter history, click the red plus sign in the bottom right and it will ask you if you are adding a note or a file. If you select file, it will allow you to search your device for an item to upload.

















11:27



 B00001/2 Tom Genever  

Workflow status bar 

WORKFLOWS DOCUMENTS KEYDATES

-  Password reset successfully.msg   
Created Date: 26/04/2021 Ref No: 69161
-  Password reset successfully.msg   
Created Date: 23/03/2021 Ref No: 66492
-  Demo Phases-Tasks.csv   
Created Date: 11/03/2021 Ref No: 65843
-  Test.docx    
Created Date: 11/03/2021 Ref No: 65842
-  Test Connector Tick    
Created Date: 11/03/2021 Ref No: 65841
-  Test Connector   
Created Date: 11/03/2021 Ref No: 65840

By pressing the More option at the bottom of the screen, you will be able to navigate to Client Ledgers/Contacts & Organisations & Document Production etc.

11:27



Client Ledgers



Contacts



Organisations



Document  
production



Time recording  
balances



Home



Client/Matter



Cases



Posit



More

If you press Document Production, you will be taken to a list of templates available.



Include Global



Work type  
GLOBAL

Description  
\_CONTACT 1

Run

Work type  
GLOBAL

Description  
\_CONTACT&ORGANISATIO...

Run

Work type  
GLOBAL

Description  
\_ORGANISATION 1

Run

Work type  
GLOBAL

Description  
\_ORGANISATION 2.1

Run

Work type  
GLOBAL

Description  
\_ORGANISATION 3

Run

Work type  
GLOBAL

Description  
\_ORGANISATION 4

Run

Work type  
GLOBAL

Description  
\_ORGANISATION 5

Run

Work type  
GLOBAL

Description  
\_Police Statement

Run

Work type  
CONSAL

Description  
001 - Test Address 3

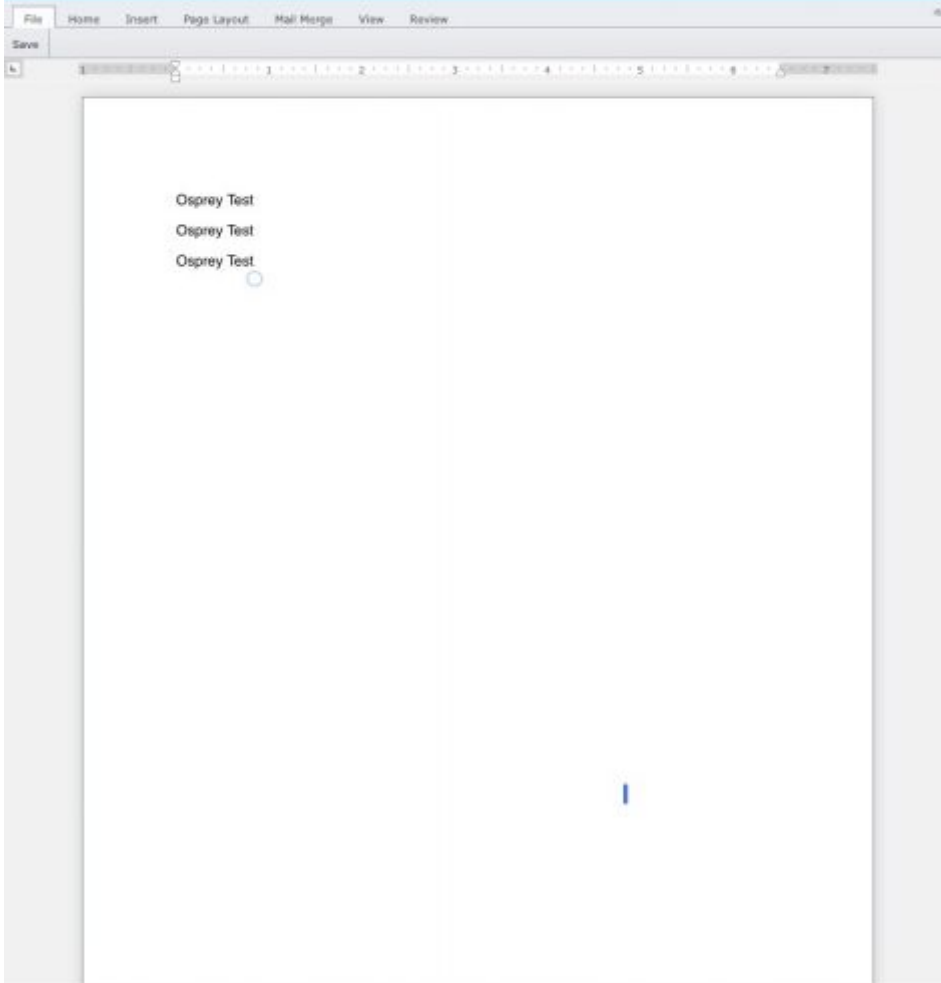
Run

When you press run on one of the documents, it will open up the online editor. Here, you can make any changes needed and then press Save in the top left.

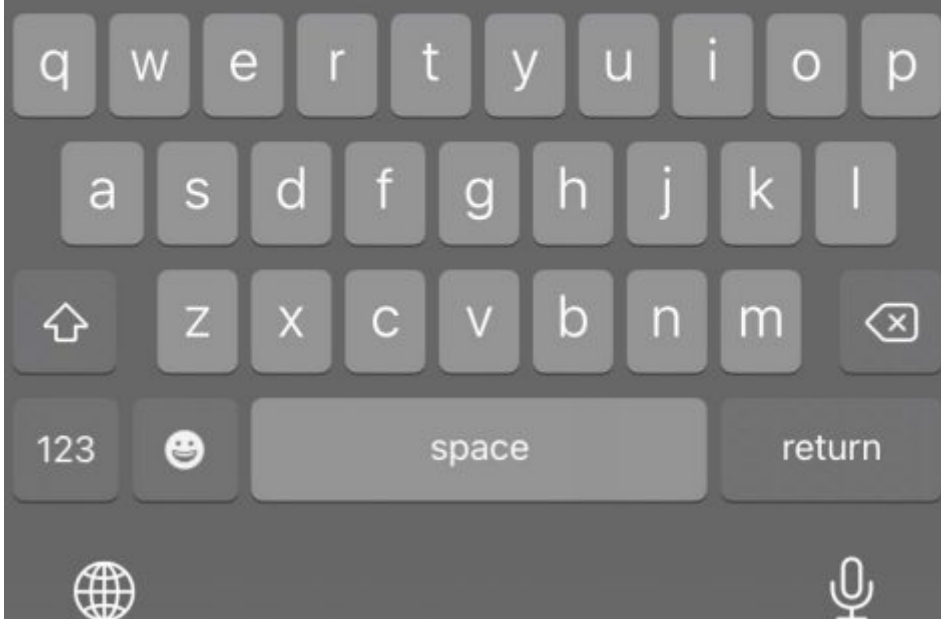
11:38



## Document production



Done



It will then ask you how you want to save it, as usual, and will give you the option to time record.





## Document production

Running: Docusign. Sign here.

Folder

-

Custom type

-

Description

Docusign. Sign here.

Retention period

Please select...

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

Save

Save with no time recording