

Osprey Approach: Using the Case Management App (Mobile)

This help guide was last updated on
Jul 30th, 2024

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.



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.

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

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.

←  🔍

LAST 10 ACCESSED SEARCH

Client no.
Client no.

Matter no.
Matter no.

Surname
Broom

Matter description
Matter description

[More options](#) ▼

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

← Search results	
0000001/1	
Description Added by smart actions	F/E MB
B00001/1	
Description	Ref. no:
B00001/2	
Description Testing prospects	F/E MB
B00001/3	
Description Another prospect	F/E MB
B00001/4	
Description CONSAL - Prospect matter to...	F/E MB
B00001/5	
Description CRIME WT -Police stations T...	F/E MB
B00001/6	
Description CRIME WT - Mags OLI0136/2...	F/E MB
B00001/8	
Description CRIME WT - CDM7 DDOM ma	F/E 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.

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

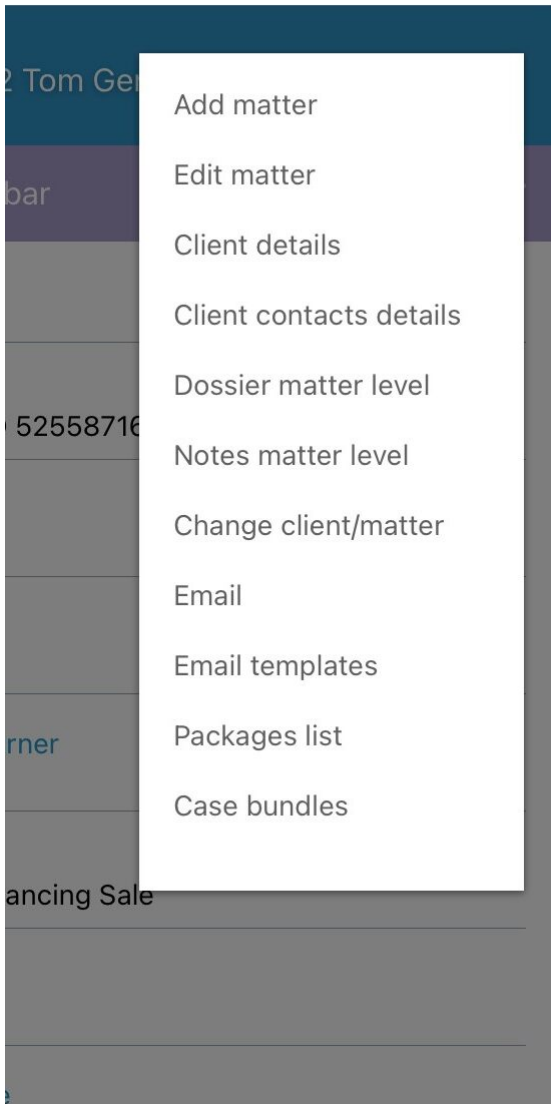
Debtor Limit
N/A

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. It will give you the option to add/edit client etc.



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



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... ▼

To view the matter history, press documents.

Navigation bar with menu icon, title "B00001/2 Tom Genever", search icon, and a "Workflow status bar" section with a pencil icon. Below are tabs for "WORKFLOWS", "DOCUMENTS", and "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 



Click the 3 vertical dots next to any item in the matter history to display the option menu.



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



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. 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.

Navigation bar with menu icon, text "B00001/2 Tom Genever", search icon, and a purple "Workflow status bar" with an edit icon. Below are tabs for "WORKFLOWS", "DOCUMENTS", and "KEYDATES".

- Document: Password reset successfully.msg (Created Date: 26/04/2021, Ref No: 69161)
- Document: Password reset successfully.msg (Created Date: 23/03/2021, Ref No: 66492)
- Document: Demo Phases-Tasks.csv (Created Date: 11/03/2021, Ref No: 65843)
- Document: Test.docx (Created Date: 11/03/2021, Ref No: 65842) with "Add note" button and purple edit icon
- Document: Test Connector Tick (Created Date: 11/03/2021, Ref No: 65841) with "Add file" button and blue edit icon
- Document: Test Connector (Created Date: 11/03/2021, Ref No: 65840) with red close icon

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.



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.

← Document production 🔍

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

File Home Insert Page Layout Mail Merge View Review

Save

1 2 3 4 5 6 7 8 9 10

Osprey Test
Osprey Test
Osprey Test

|



Done

q w e r t y u i o p
a s d f g h j k l
⌈ z x c v b n m ⌋
123 😊 space return



It will then ask you how you want to save it, 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