



# 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>



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

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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](#) ▼

Search

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

← 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 DDOM ma	<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.

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

---

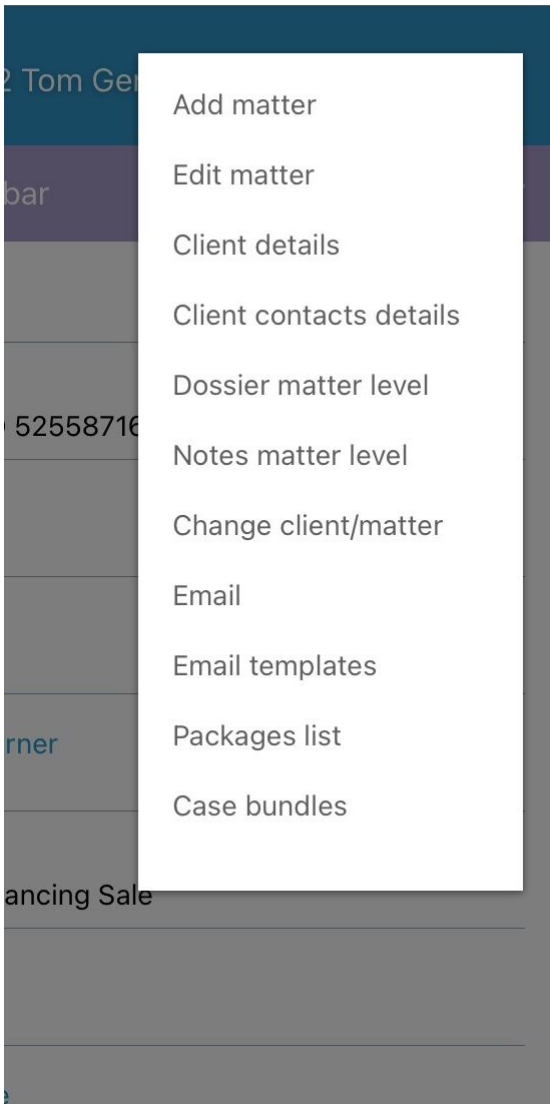
**Disbursement Limit**  
N/A

---

**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.

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

Buttons for "Load Workflow", "Remove all", and a "+" icon. Below them is a toggle switch for "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 workflow status bar. 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)
- Document: Test Connector Tick (Created Date: 11/03/2021, Ref No: 65841)
- Document: Test Connector (Created Date: 11/03/2021, Ref No: 65840)



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

Workflow status bar



WORKFLOWS

DOCUMENTS

KEYDATES

Document: Password reset successfully.msg



Options

Preview

Check out

Online editor check out

Edit details

Revision history

Web enable

Delete

Clone

Document: Test Connector Tick



Created Date: 11/03/2021

Ref No: 65841



Document: 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".

-  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.



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	Description	
GLOBAL	_CONTACT 1	Run
GLOBAL	_CONTACT&ORGANISATIO...	Run
GLOBAL	_ORGANISATION 1	Run
GLOBAL	_ORGANISATION 2.1	Run
GLOBAL	_ORGANISATION 3	Run
GLOBAL	_ORGANISATION 4	Run
GLOBAL	_ORGANISATION 5	Run
GLOBAL	_Police Statement	Run
CONSAL	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