Osprey Approach: Using the Case Management App (Mobile)

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

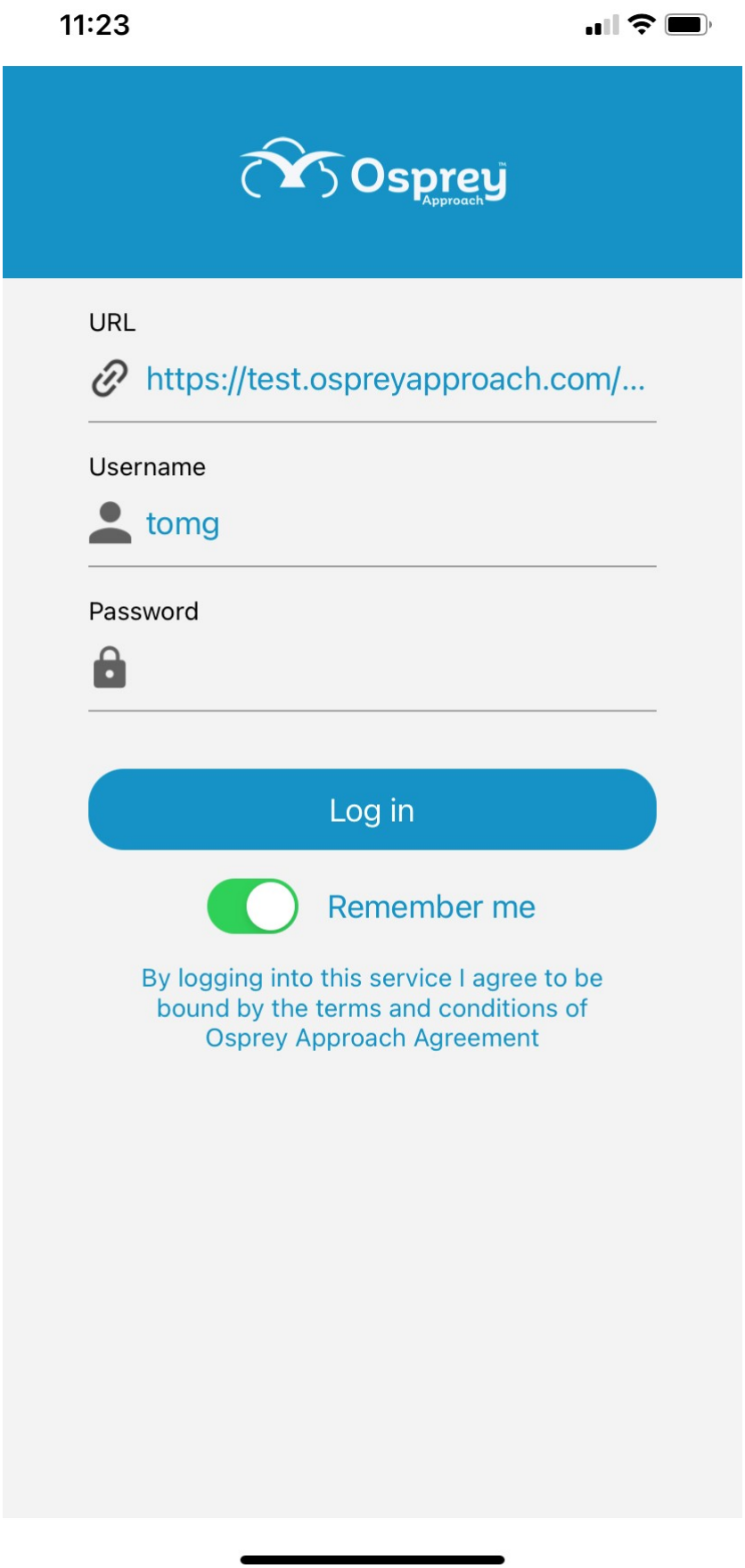
The latest version is always online at
https://support.ospreyapproach.com/?p=34876

Click here for a printer-friendly version

Osprey™ Approach

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.

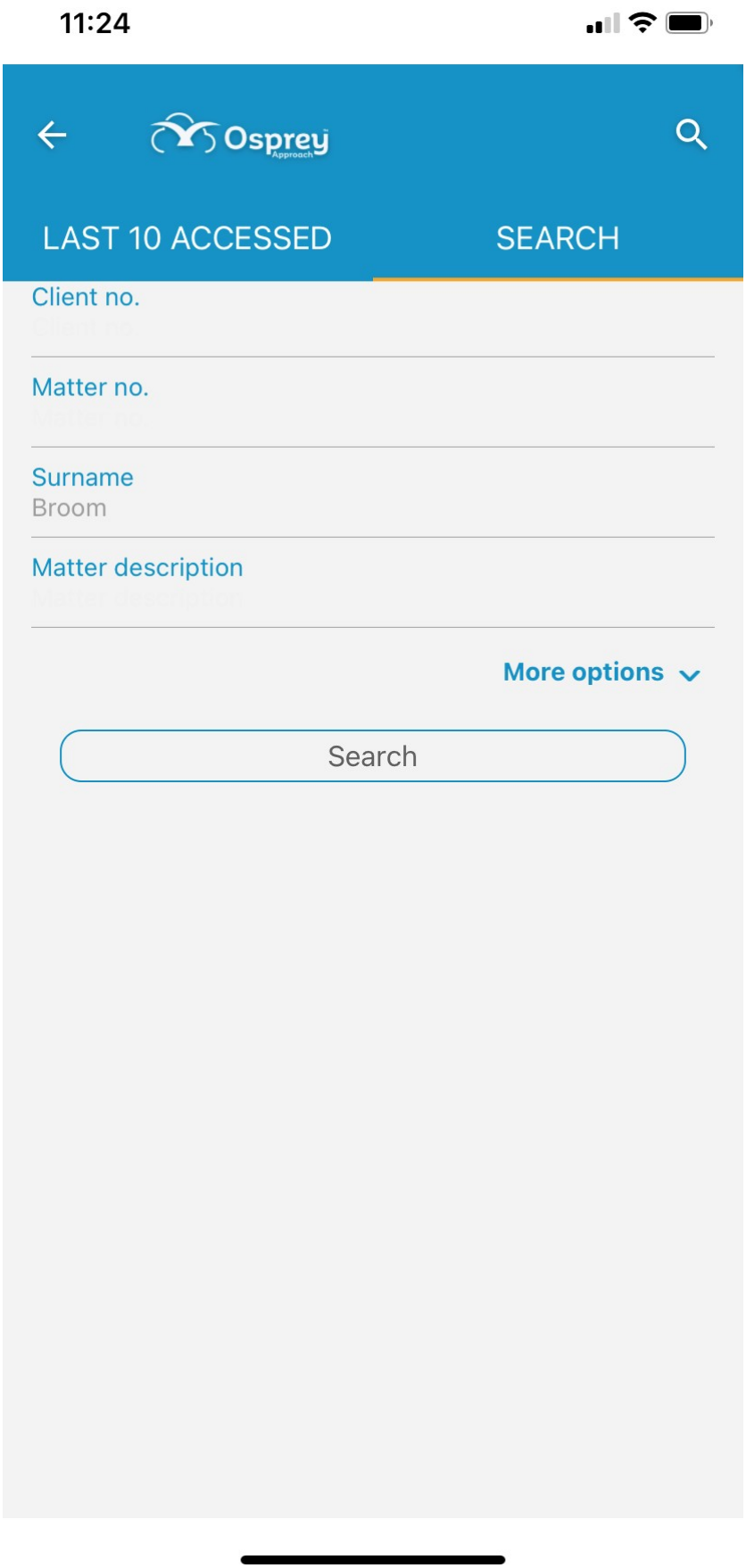
Download the app from the App Store, open it up and login as you usually would.



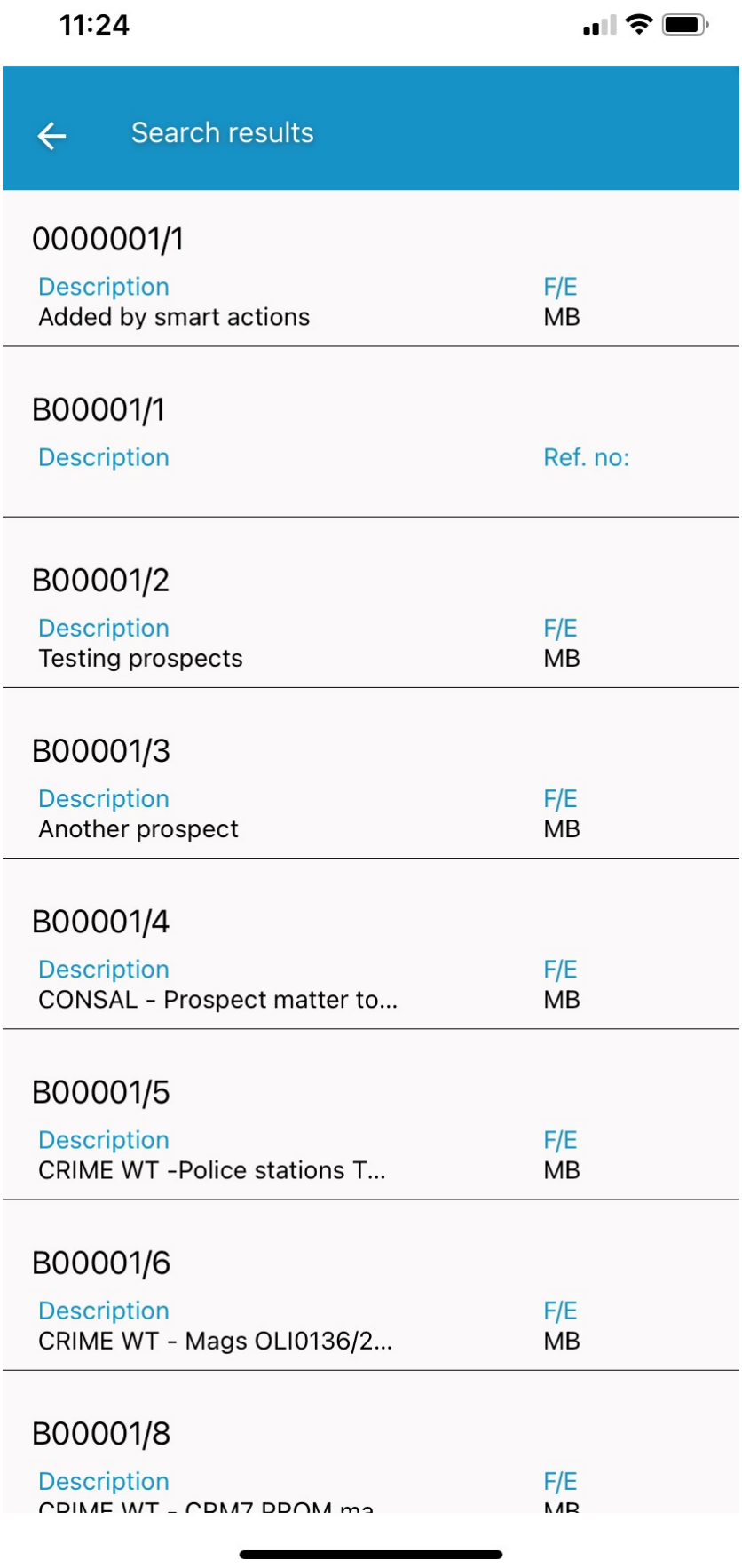
This is the homepage on the app - your key dates are displayed here. At the bottom of the screen are the navigation buttons.



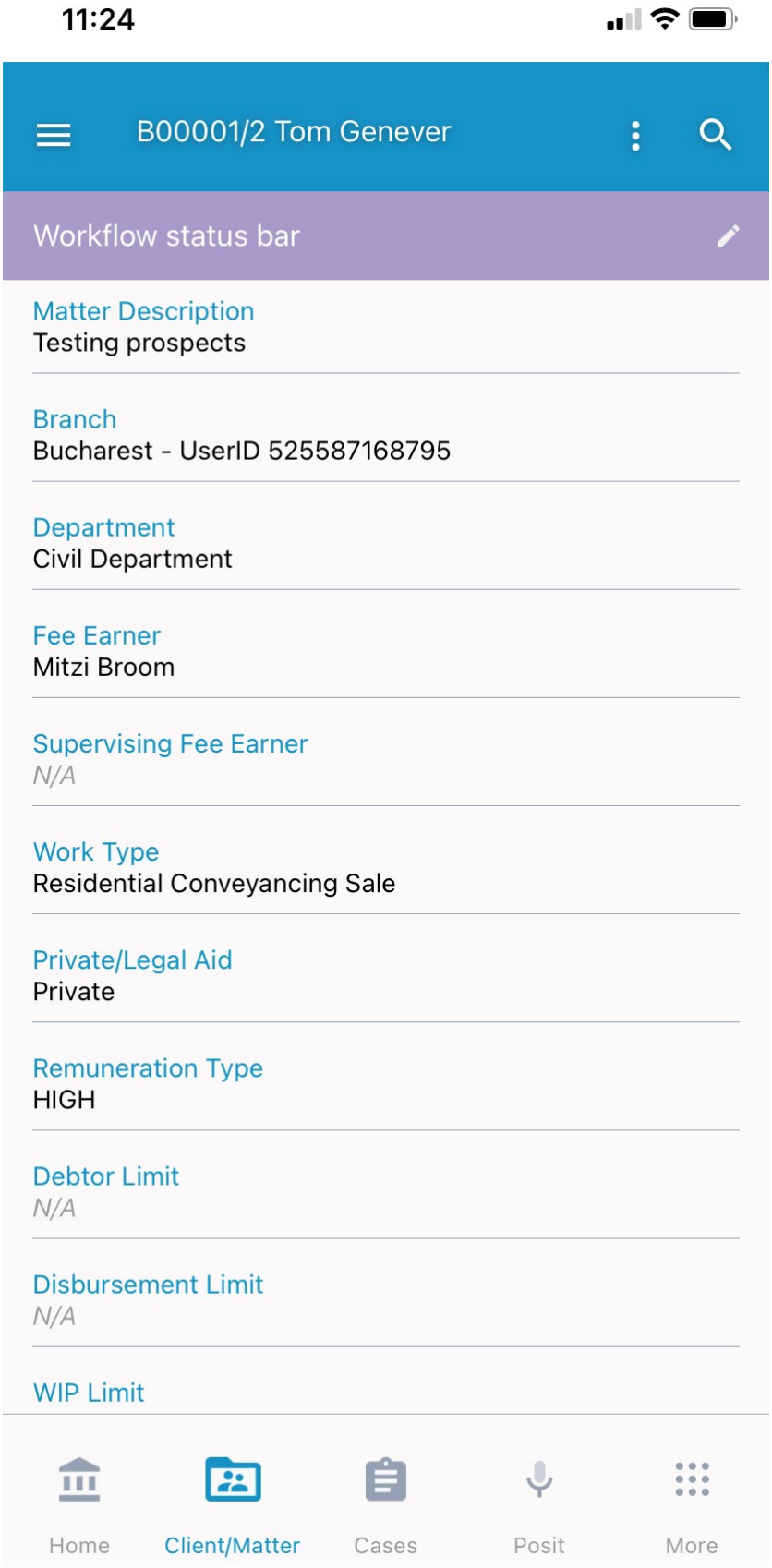
To load up a file, press Client/Matter at the bottom and you will then see the search screen. Enter the search criteria and then click Search.



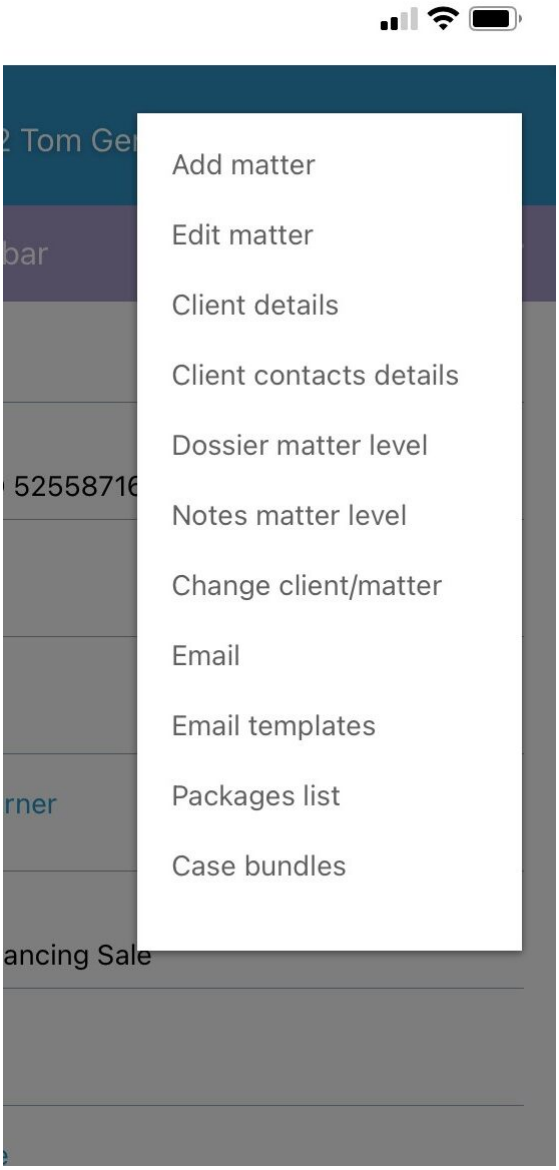
You will see your list of search results returned - just press on the one you wish to open.



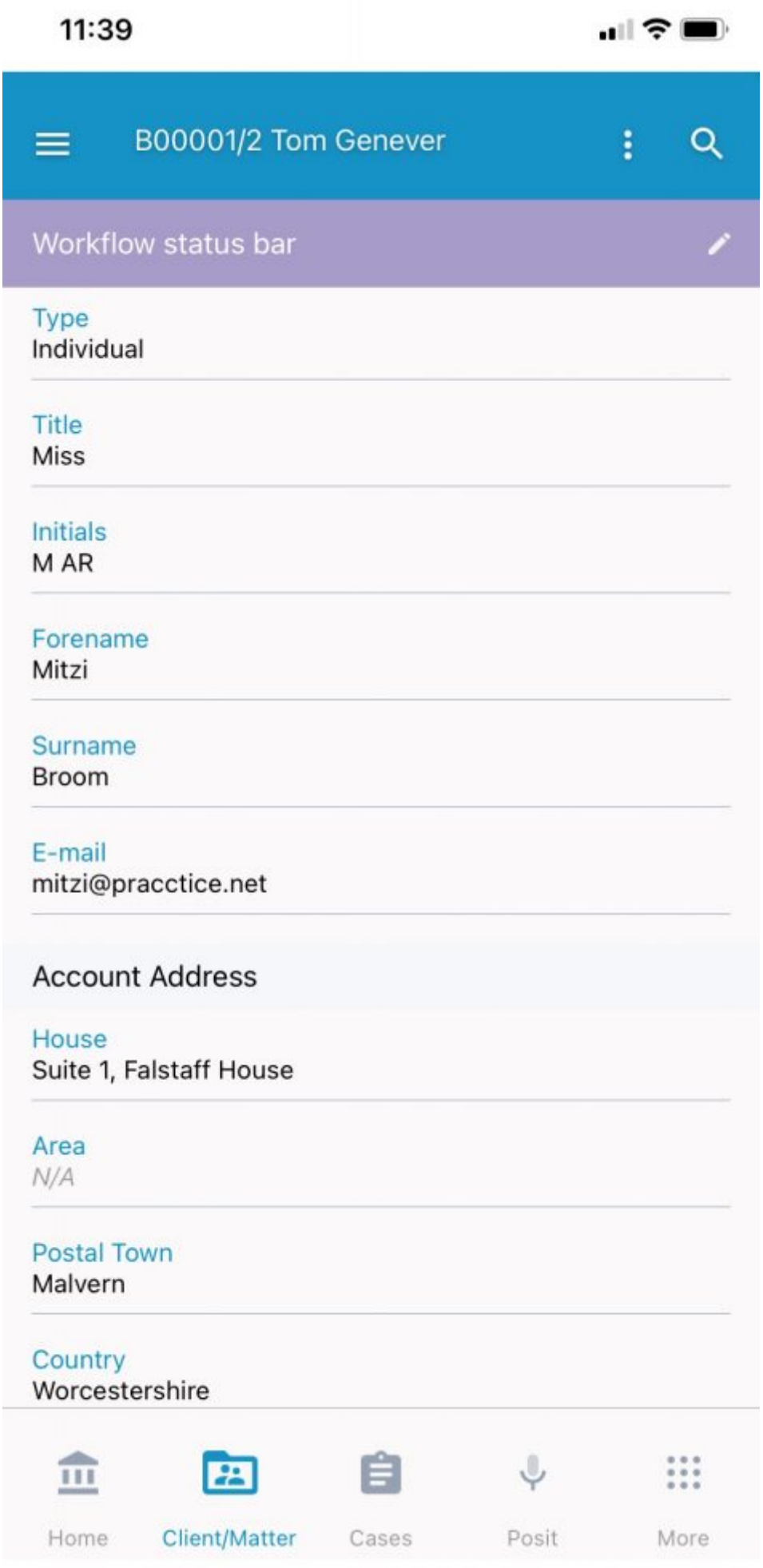
As with the browser/desktop app, you will be taken to the Matter Details overview. The three vertical dots in the top right hand corner will give you further menu options as shown in the next image.

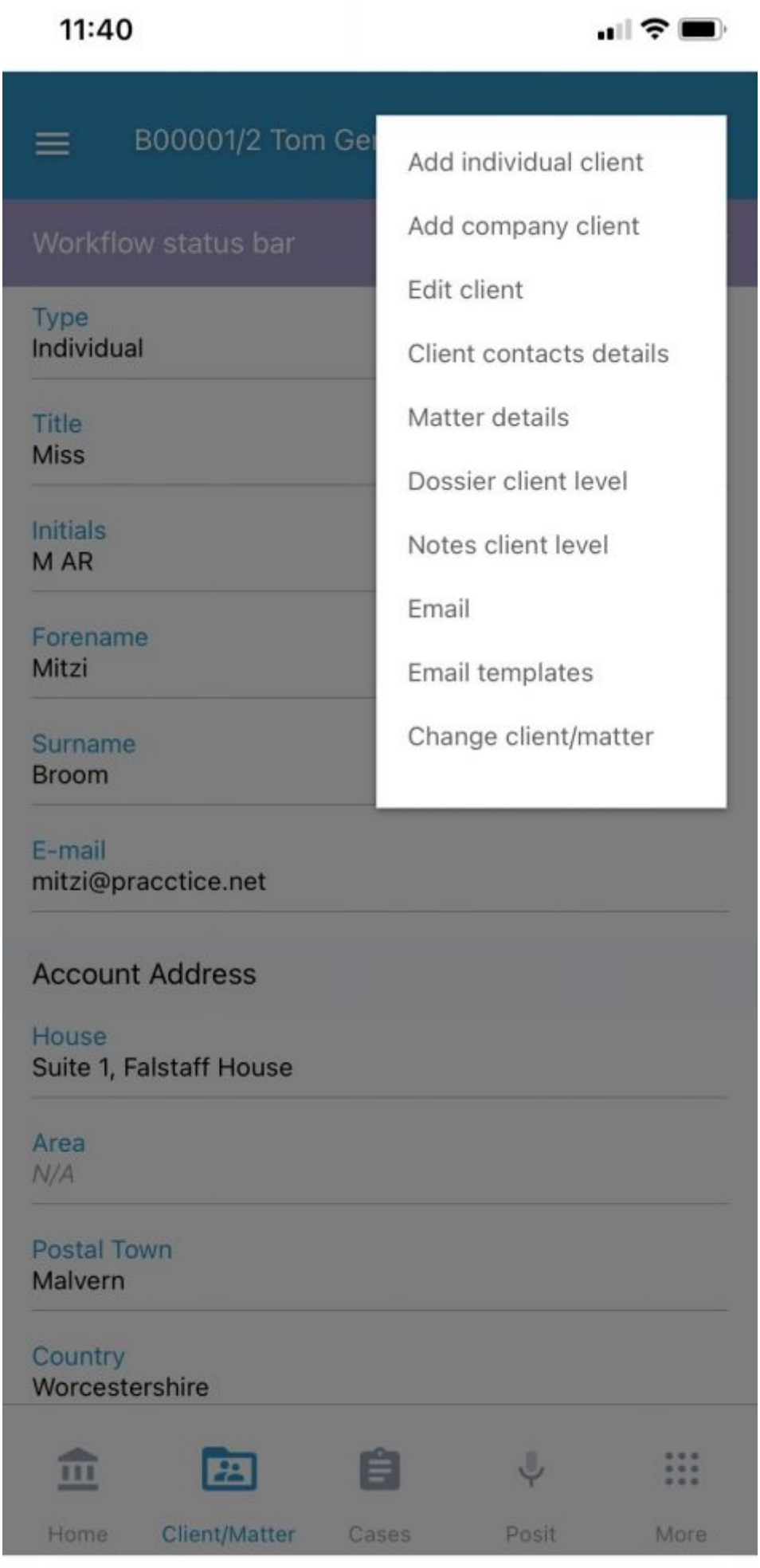


From here you can change to client details, add/edit matters, fill in dossier pages etc.

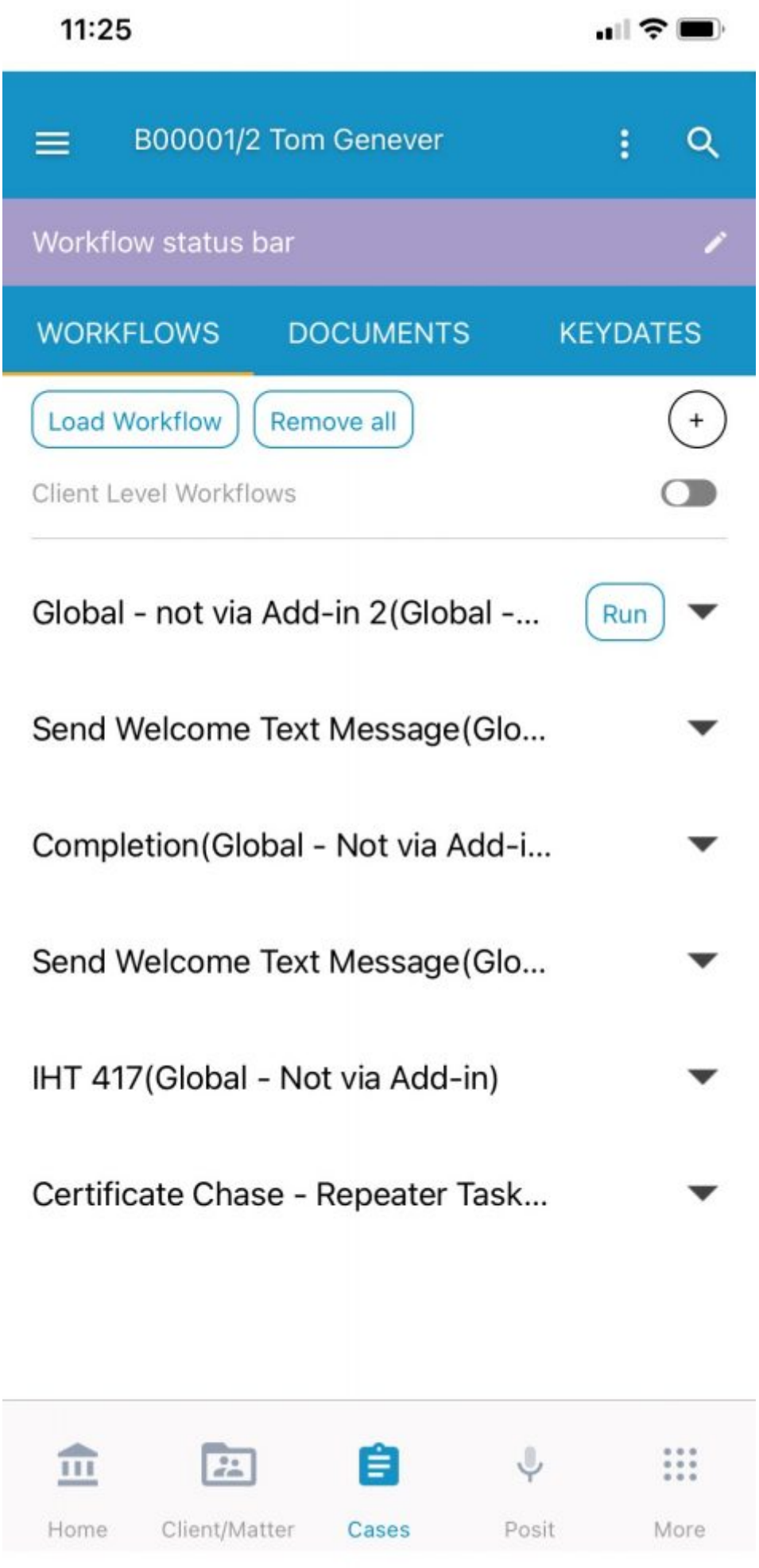


By pressing Client details it will show you the client details screen as opposed to the matter details and will give you the option to add/edit client etc.

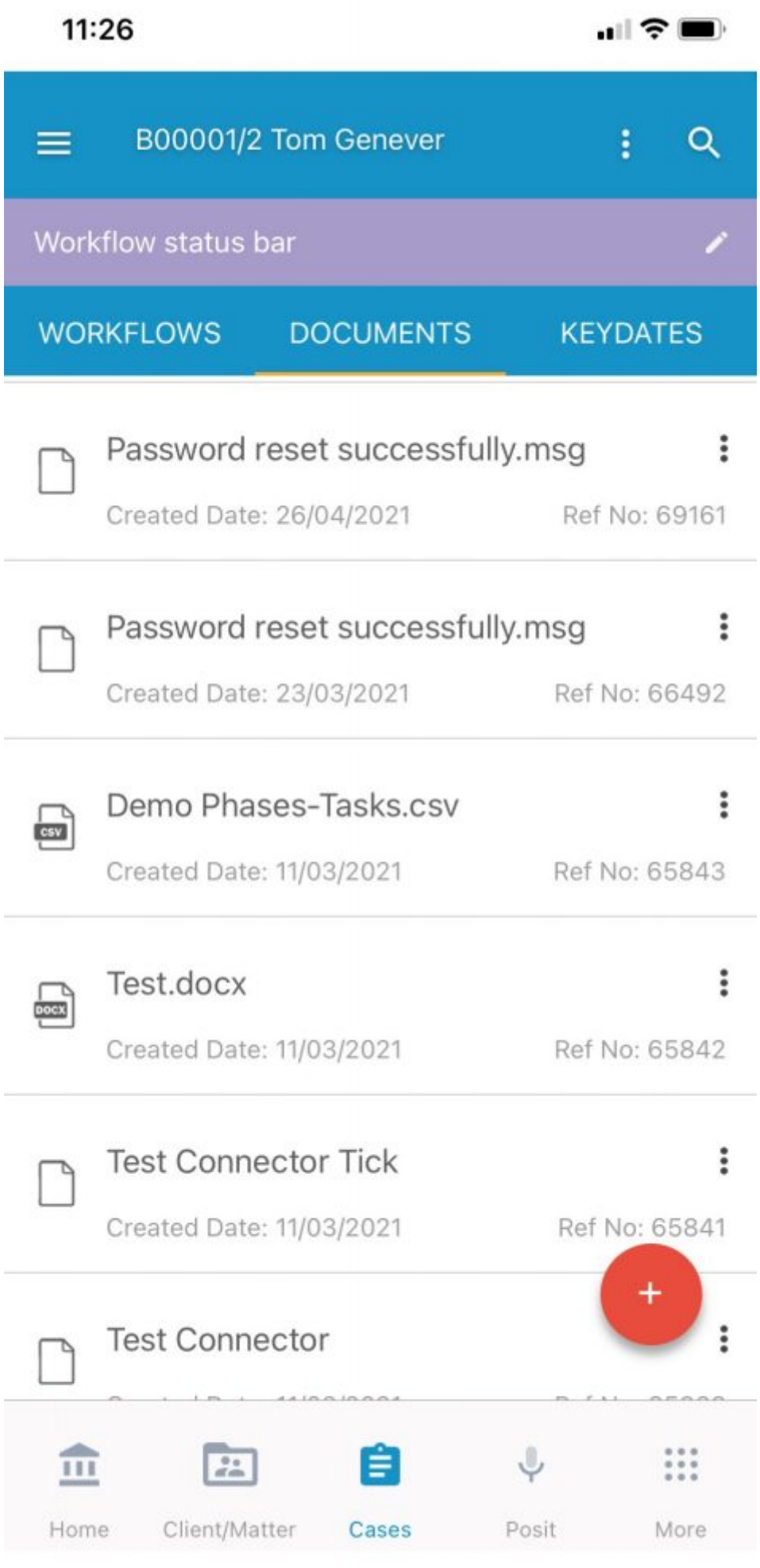

11:39
B00001/2 Tom Genever
Workflow status bar
Type
Individual
Title
Miss
Initials
M AR
Forename
Mitzi
Surname
Broom
E-mail
mitzi@pracctice.net
Account Address
House
Suite 1, Falstaff House
Area
N/A
Postal Town
Malvern
Country
Worcestershire
Home
Client/Matter
Cases
Posit
More


11:40
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

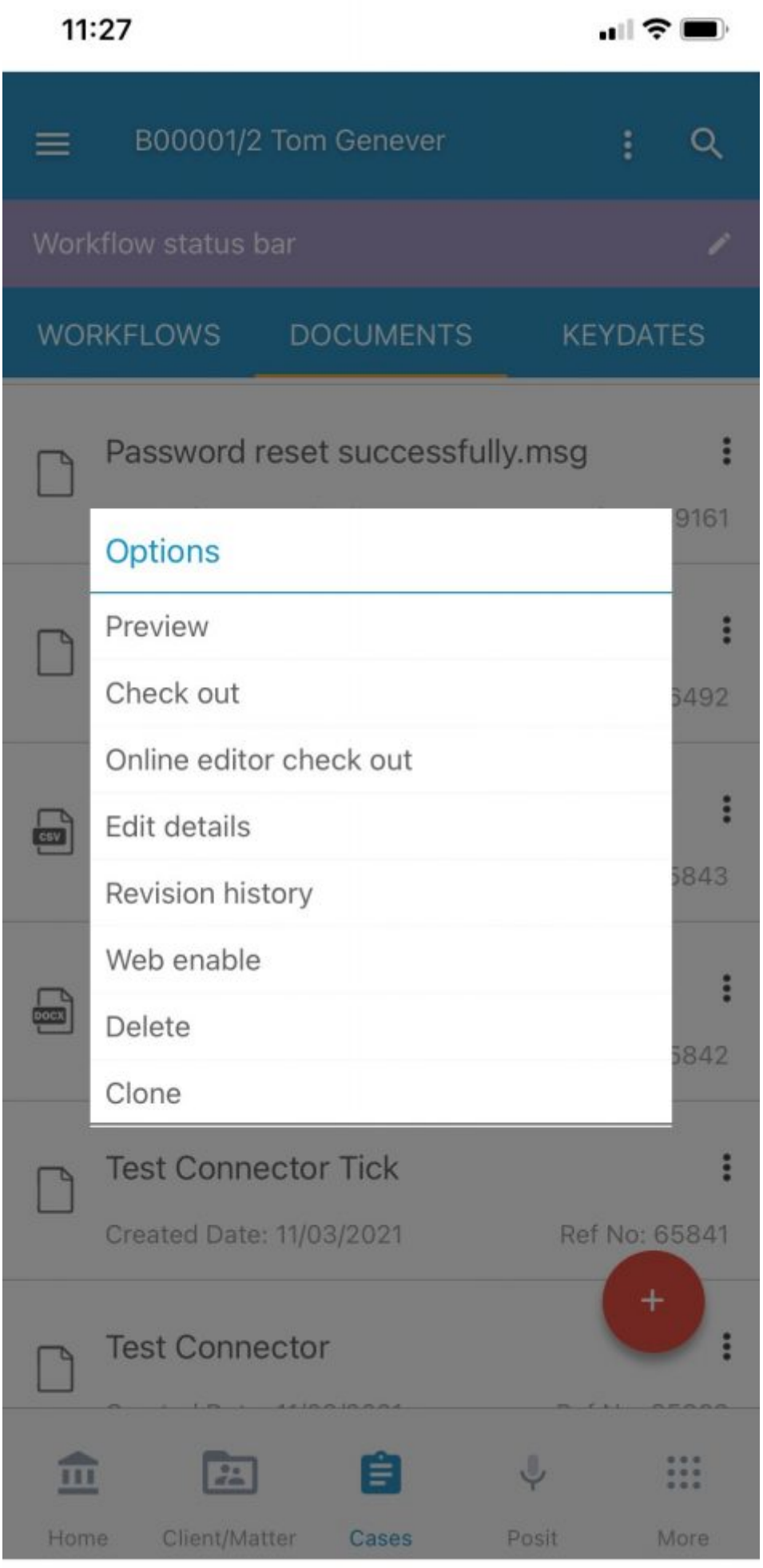
If you press Cases at the bottom, you will see the case management section - workflows, documents and key dates.


11:25
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

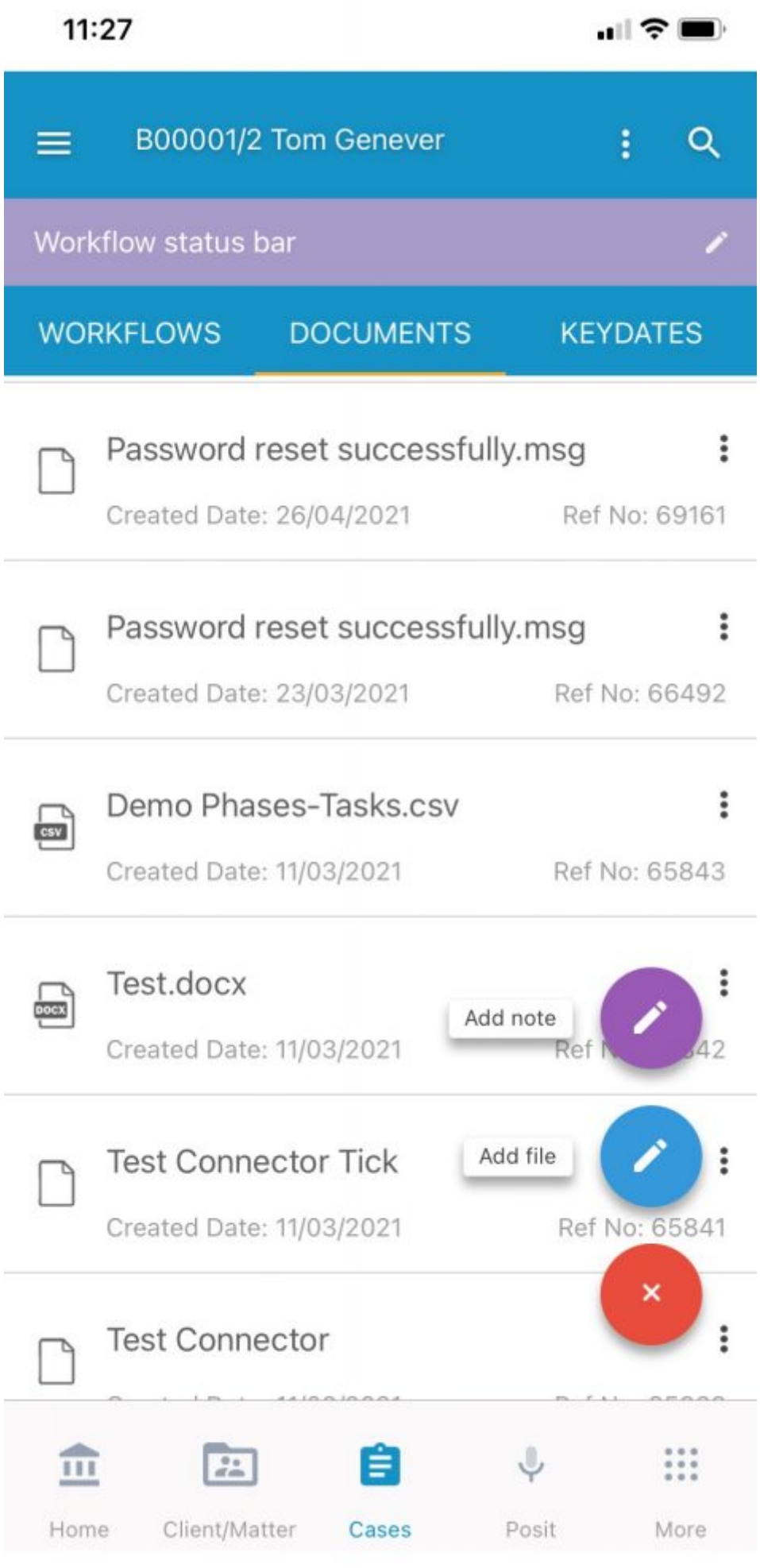
To view the matter history, press documents.


11:26
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

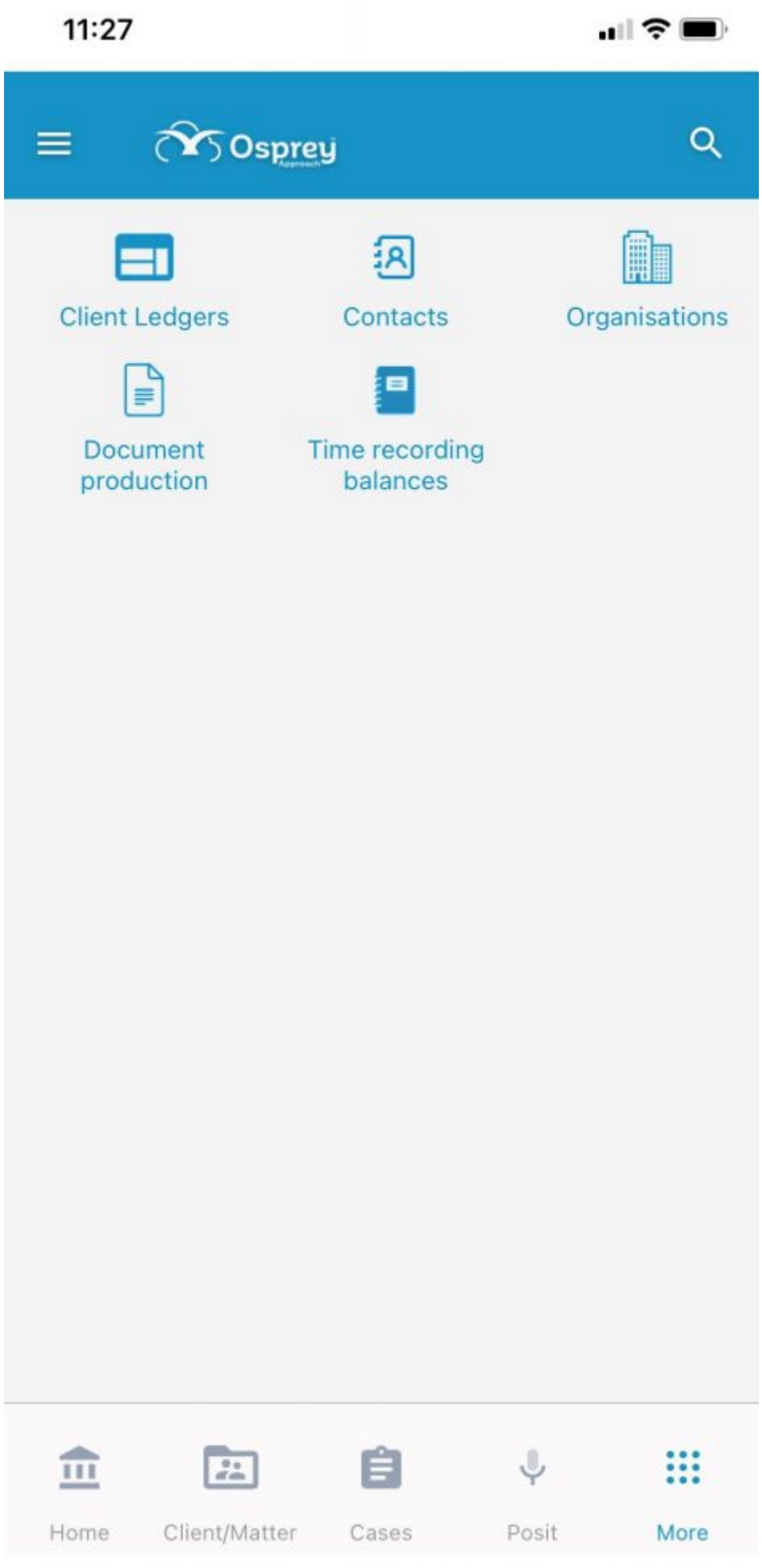
If you click the 3 vertical dots next to any time in the matter history, it will show you the option menu.


11:27
B00001/2 Tom Genever
Workflow status bar
WORKFLOWS
DOCUMENTS
KEYDATES
Password reset successfully.msg
9161
Options
Preview
Check out
Online editor check out
Edit details
Revision history
Web enable
Delete
Clone
6492
5843
5842
Test Connector Tick
Created Date: 11/03/2021
Ref No: 65841
Test Connector
Home
Client/Matter
Cases
Posit
More

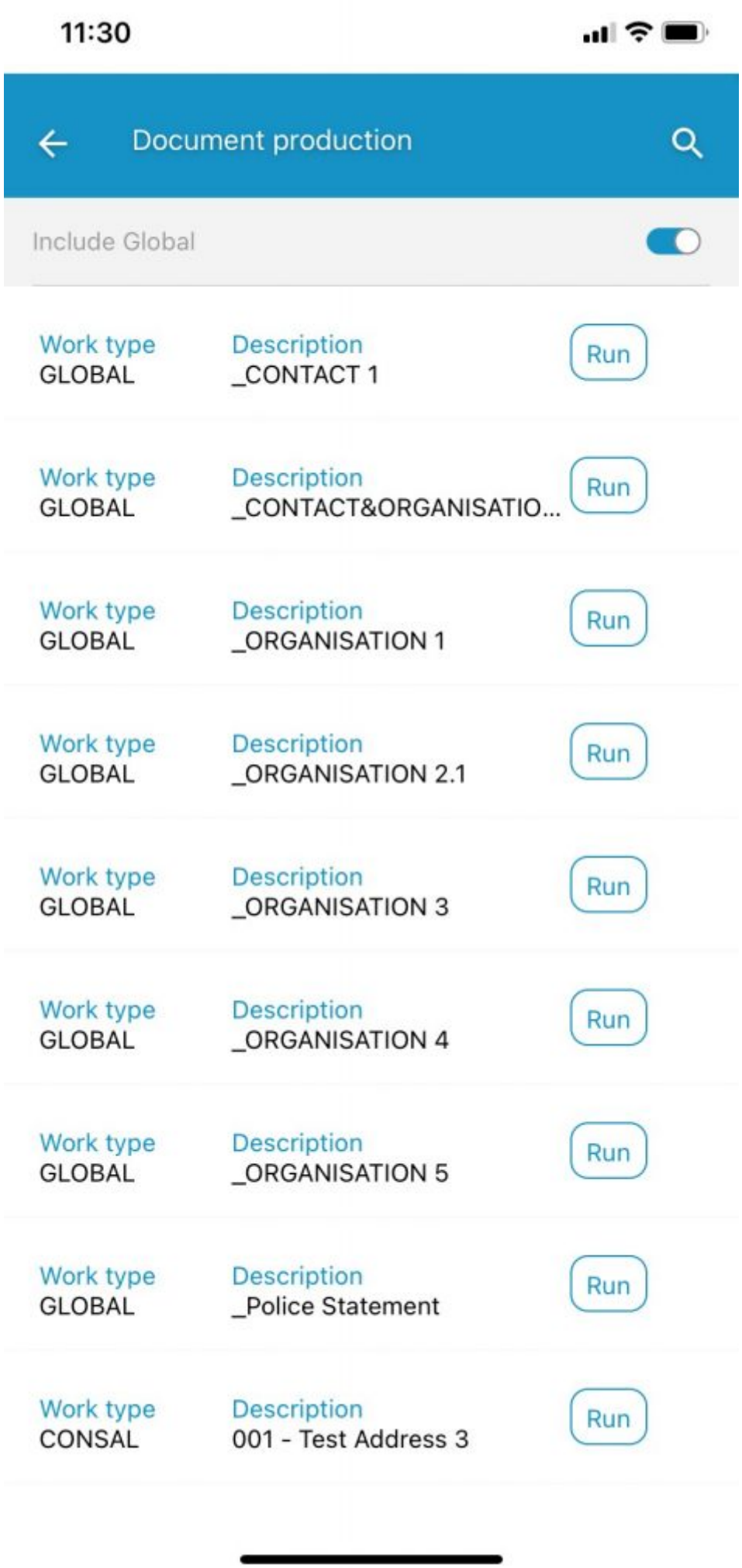
To add a new item to the matter history, click the red plus sign in the bottom right and it will ask you if you are adding a note or a file. If you select file, it will allow you to search your device for an item to upload.


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
Add note
Test Connector Tick
Created Date: 11/03/2021
Ref No: 65841
Add file
Test Connector
Home
Client/Matter
Cases
Posit
More

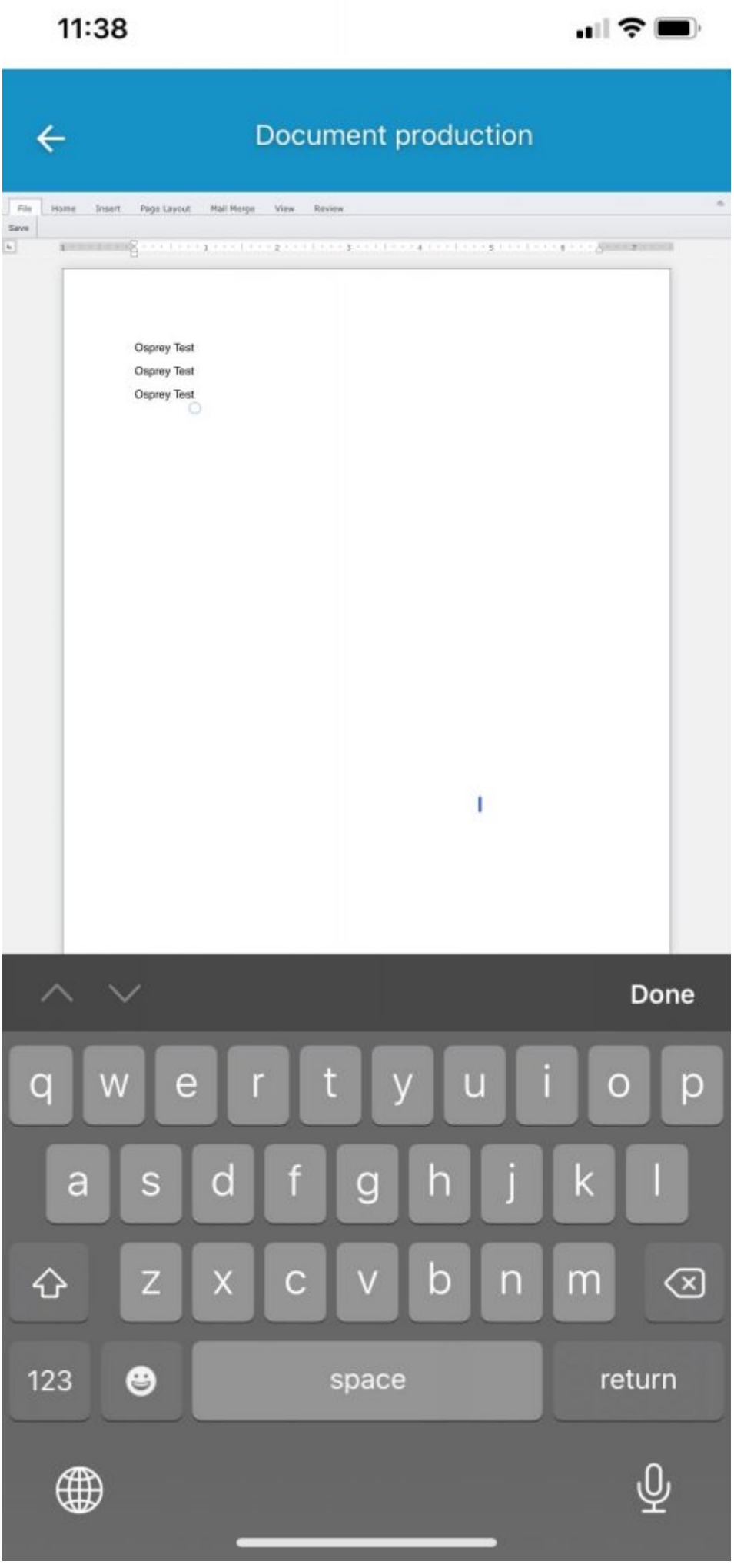
By pressing the More option at the bottom of the screen, you will be able to navigate to Client Ledgers/Contacts & Organisations & Document Production etc.


11:27
Osprey
Client Ledgers
Contacts
Organisations
Document production
Time recording balances
Home
Client/Matter
Cases
Posit
More

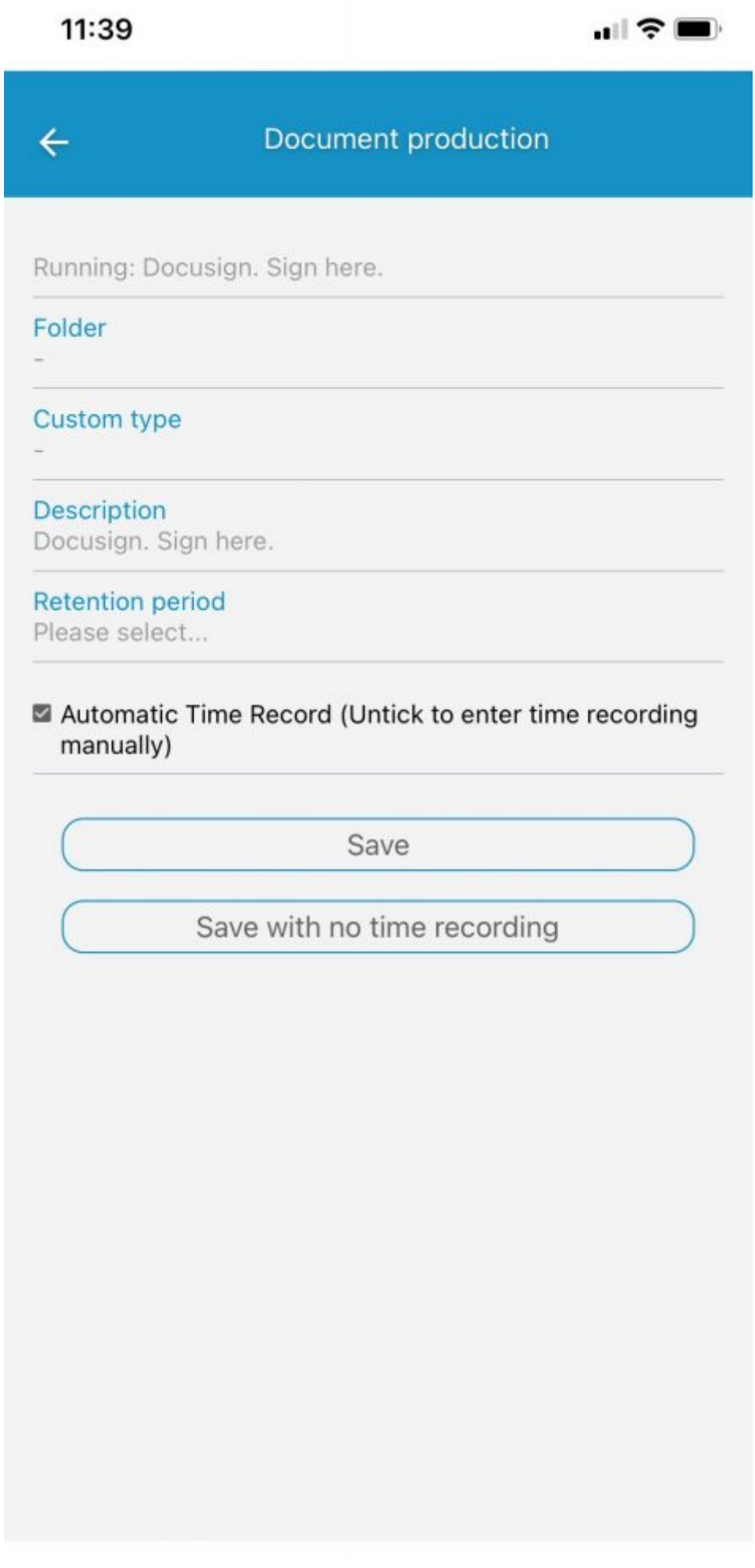
If you press Document Production, you will be taken to a list of templates available.


11:30
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
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, as usual, and will give you the option to time record.


11:39
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