

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>



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.

11:23





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

▼

Search

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

11:24



← 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 BDOM m...	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 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

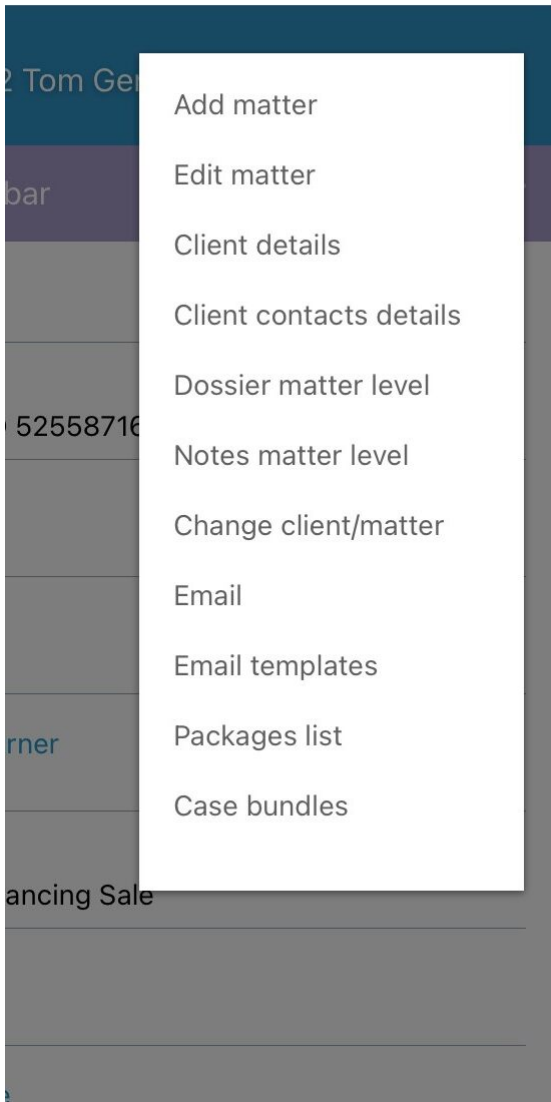
Client/Matter

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

Preview

Check out

Online editor check out

Edit details

Revision history

Web enable


Delete

Clone

5492


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.

 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.



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

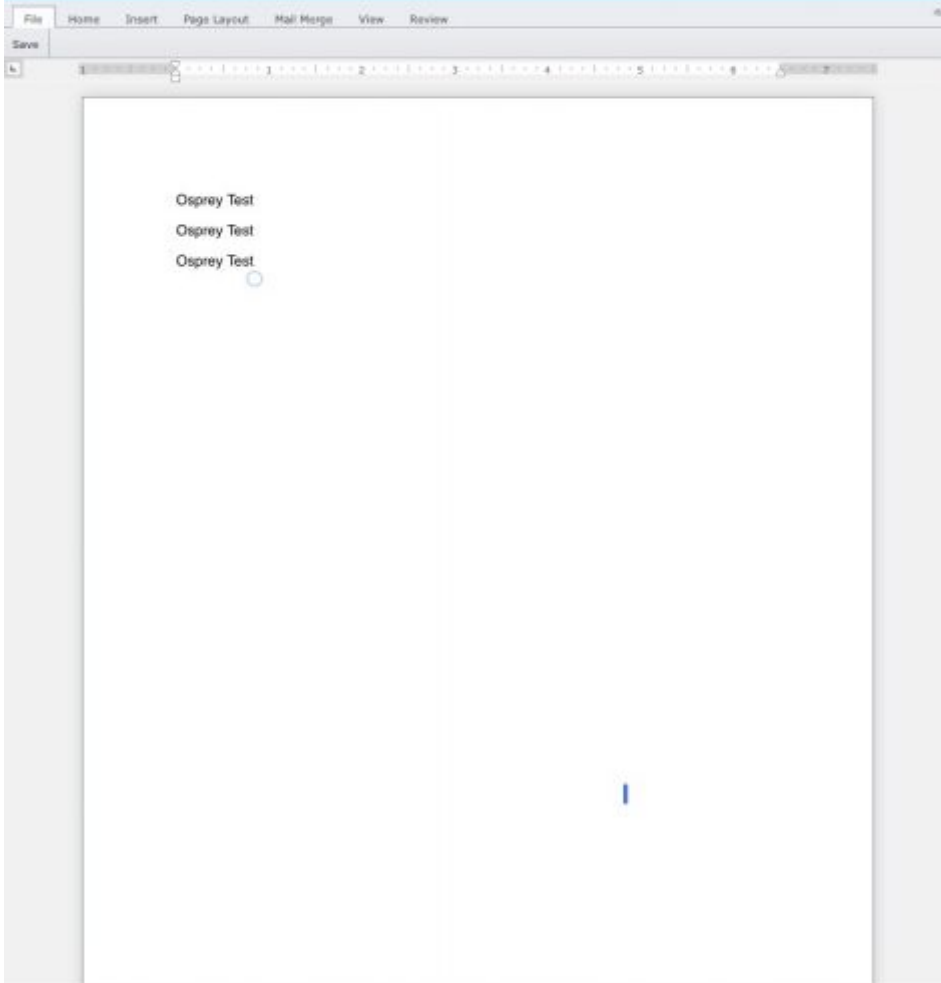
Run

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.

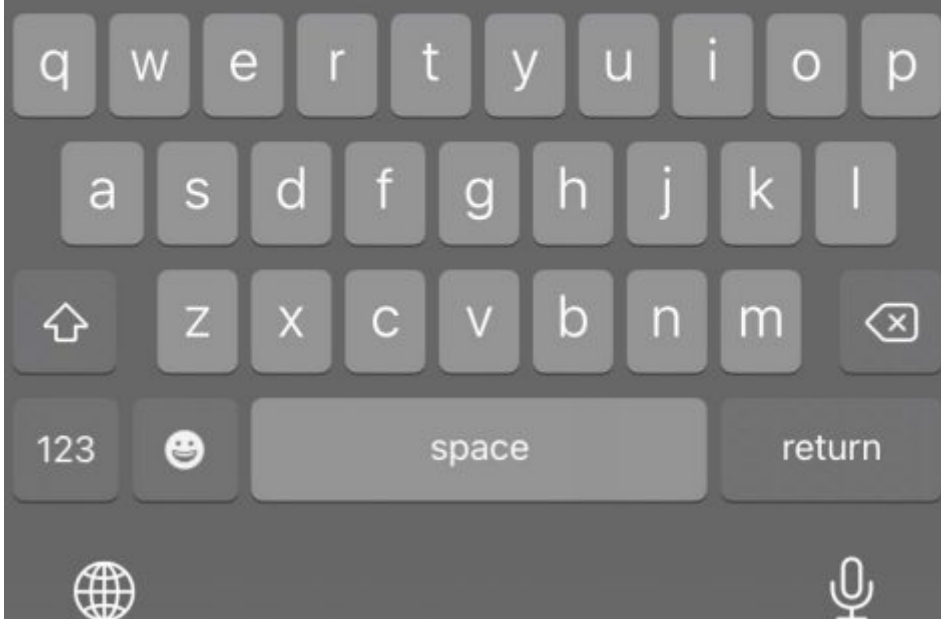
11:38



Document production



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