

Osprey Approach: Install and use the Osprey COM add-in for Microsoft Office

This help guide was last updated on
Dec 6th, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=441>

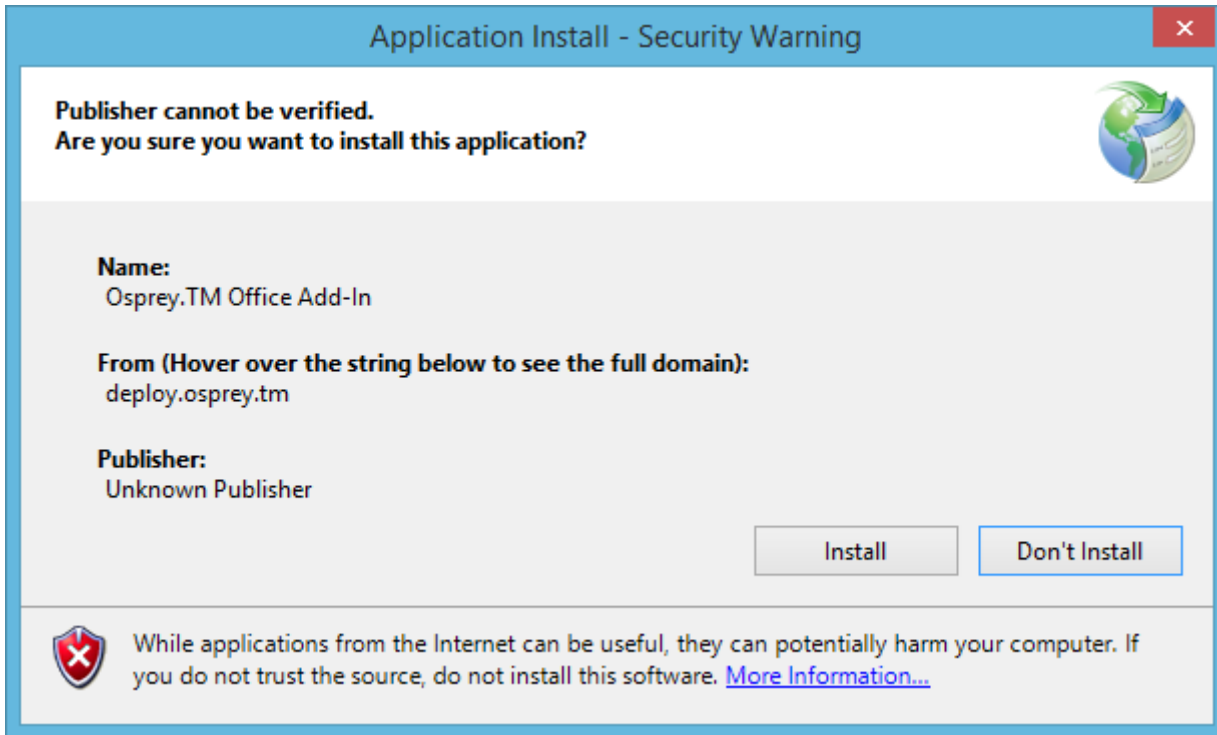


The Osprey Office Connector allows you to set up interactivity between Microsoft Word, Microsoft Excel and Osprey. This guide will take you through installing and using the add-in.

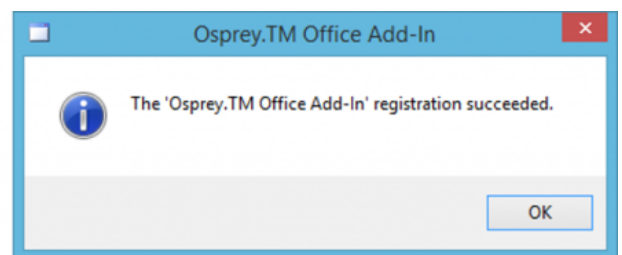
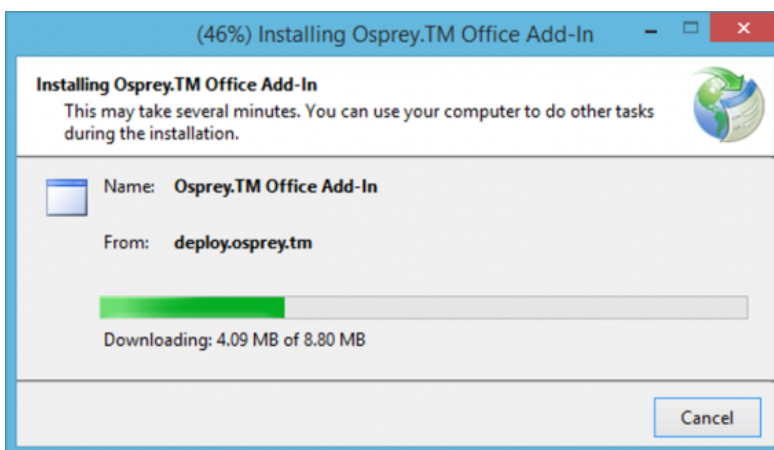
Install the Add In

First you will need to install the Office add-in. Close ALL active programs currently running on your machine before proceeding.

Click [here](#) to begin downloading the add-in.

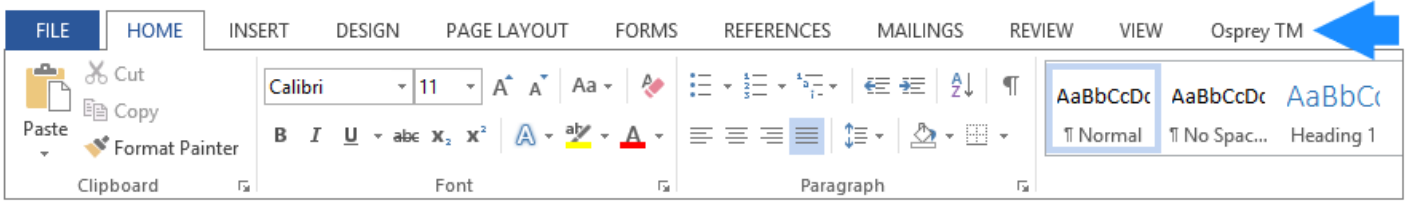


Click 'Install' and a progress bar will appear showing the progress of the install. Select 'OK' once the installation has completed to finalise the registration.



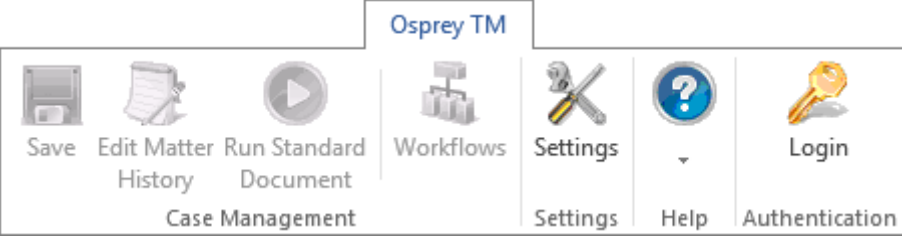
Using the Word Add In

Once installed, open Microsoft Word and you will see an additional menu item in the word toolbar as shown below.

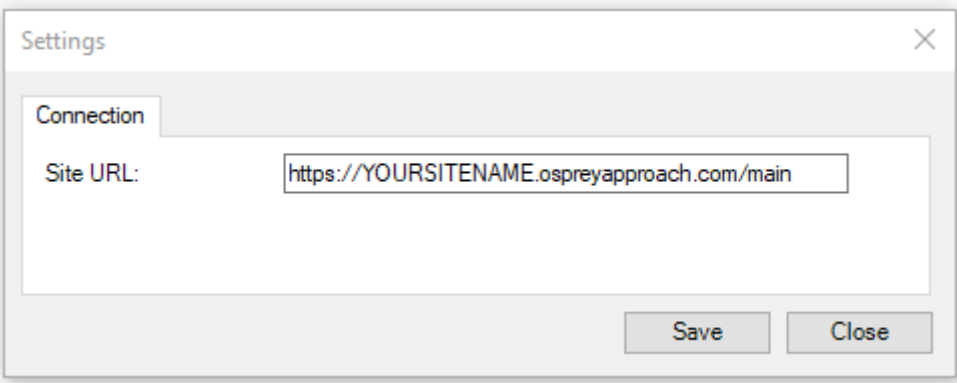


Before using the Add-In, you must firstly apply the relevant settings. You are required to enter your URL and your username and password. If you do not enter the correct settings, you will be unable to use the application.

Click on the 'OspreyTM' tab and then select 'Settings'.

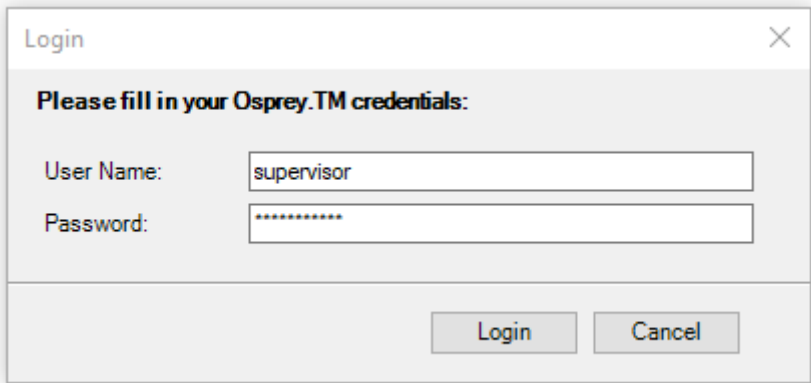


Enter your URL into the 'Site URL' box. Please remember to include the https:// prefix to your URL, so it should display as below.

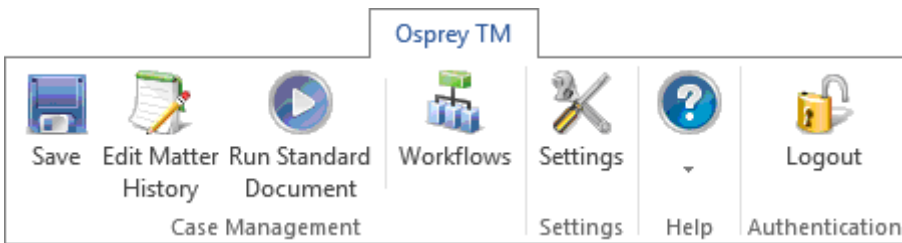


Now click 'Save' to keep your settings.

Now select the option to 'Login' on the OspreyTM tab. Enter your username and password, then click 'Login'.



All icons on the OspreyTM tab should now be available.



Once logged in, the 'Login' icon will have changed to display an option to 'Logout', as shown above. Click this to log out of the Word add-in.

From within Microsoft Word™, the Office Add-In will allow you to:

- Select and open any existing Osprey Word Templates from a client's file and then edit and save to a their Osprey matter history.
- Create a new word document and add it to the matter history of a specified Client.
- View and amend matter history documents
- Run and load workflows.

There is no need to have the Osprey application open; you just need to ensure you are logged in through Word.

Running Standard Documents

First we will look at opening an Osprey document from your standard documents area through the add-in.

Click 'Run Standard Document' to open up the 'Client Search' box, as displayed on the next page.

The screenshot shows the 'OspreyTM Standard Document Search' dialog box with the following fields and controls:

- Client/Matter:** Client No: [text box], Matter No: [text box] with an advanced search icon (...).
- Filters:** Description: [text box], Include Global.
- Search:** [Search button]
- Results:** A table with the following columns: Work Type, Description, Expert Type, Email to Client, Email to Associate.

To search for a client's file, enter in the Client and Matter numbers where specified and then select 'Search' to return a list of available templates. If the client reference is unknown, select the advanced search box next to the 'Matter No' Box to bring up the below panel.

Client/Matter Search ✕

Client/Matter Search

Client No: Matter No:

Surname: Matter Description:

Forename: Fee Earner:

House: Work Type:

Town: Client only

Results:

Client No	Forename	Surname	House	Postal Town

Enter the relevant details and then click 'Search' to return a list of the search results. Right click on the relevant search result and then click 'Select', this will return you to the initial screen but the client reference and matter number will now be displayed.

Click the 'Search' button and this will list all available document templates for the selected matter.

OspreyTM Standard Document Search ✕

Client/Matter

Client No: Matter No:

Filters

Description: Include Global

Results

Work Type	Description	Expert Type	Email to Client	Email to Associate
GLOBAL	Cli Care letter	CLIENT	N	N
RCS	Draft Contract	SOLICITOR	N	N
RCS	Fixtures and Fittin...	None	N	N
RCS	Letter to Estate A...	SOLICITOR	Y	N
RCS	Letter to Estate A...	SOLICITOR	Y	N

To select a document, right click on the required document in the available list and then select the option to 'Run' which should then appear.

Work Type	Description	Expert Type	Email to Client	Email to Associate
GLOBAL	Cli Care letter	CLIENT	N	N

The document will now open in Microsoft Word.

To save your documents in a client's matter history, Click the 'Save' button on the OspreyTM bar. The save window will then appear.

Either accept the 'Default Document Name' or overtype with a new description and then click 'Save'.

You can now search for a client and matter to save the document on.

Client No	Matter No	Matter Description	Forename	Surname
WO0001	1	Sale of 9A Bridge...	Richard	Wood

Once you have performed the search, a list of that client's matters will be available.

Right-click on the matter on which you wish to save the document and select the 'Save' option.

You will now be prompted to enter a description for your document which will appear in the matter history, as well as selecting a custom type and allocating the document to a folder if required.

Custom Type	Please select...
Folder	[Browse]
File Description	Client Care Letter

Select 'Save' to complete the process. Now if you log into Osprey and view the matter history of that client, you will notice your document has now been saved.

Saving Document to the Matter History

You are also able to create and save a new document from a blank word template.

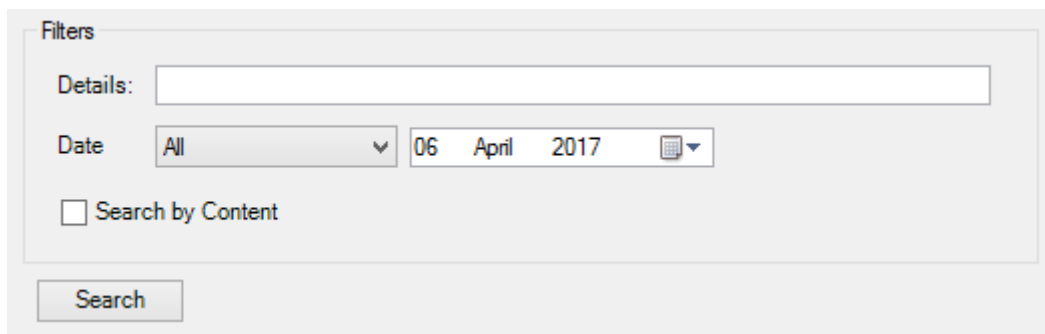
Open a word document in the normal way. Once you have finished work on it, select the 'Save' option on the OspreyTM tab. You can then follow the above process to save your new document to the matter history

Opening Documents Saved in the Matter History

You are also able to open a document from a selected client's matter history by clicking the 'Edit Matter History' icon.

This will open up the client search screen. Enter the client reference and matter number if known, or use the advanced client search.

This search screen also offers various filters to refine the search results.



The image shows a 'Filters' section with the following elements:

- Details:** A text input field.
- Date:** A dropdown menu currently set to 'All', followed by a date selection field showing '06 April 2017' with a calendar icon.
- Search by Content:** A checkbox that is currently unchecked.
- Search:** A button located below the filter options.

Details: Enter in the exact document description to return any matches.

Date: Allows you to search history entries by a specific date or date range.

Type: Enables searching for either a standard document or a word document added through the add item option in the matter history or added via the add-in.

Content: If you have purchased this facility, this will enable you to search by a specific word within your documents.

Click the 'search' button to bring through your results. Depending on the filter options used. You will see a list of matter history documents for the selected client and matter.

Matter History Search ✕

Client/Matter

Client No: Matter No:

Filters

Details:

Date:

Search by Content

Results

	Client	Matter	Details	Created Date/Time	Name	Ext
	WO00...	1	Client Care Letter	4/6/2017 10:31 ...	ospe1658d3b-a1...	.doc
	WO00...	1	Draft Contract	12/3/2015 12:16...	Draft_Contract-1...	.doc
	WO00...	1	Fixtures and Fittings Form	12/3/2015 12:15...	Fixtures and Fittin...	.doc
	WO00...	1	Cli - Report Letter	12/3/2015 12:14...	Cli - Report Letter...	.doc
	WO00...	1	Cli Care letter	12/3/2015 12:14...	Cli Care letter.doc	.doc
	WO00...	1	Client Care Letter	12/2/2015 12:17...	Youtube Uploaddoc
	WO00...	1	Fixtures & Fittings Form	12/2/2015 12:17...	Youtube Uploaddoc

To open a document, right click it and click 'Select'. The document will now open.

If you have made changes to a document opened using the 'Edit Matter History' button, click 'Save' and a panel will appear displaying the original document title.

Save to Matter History ✕

File Description:

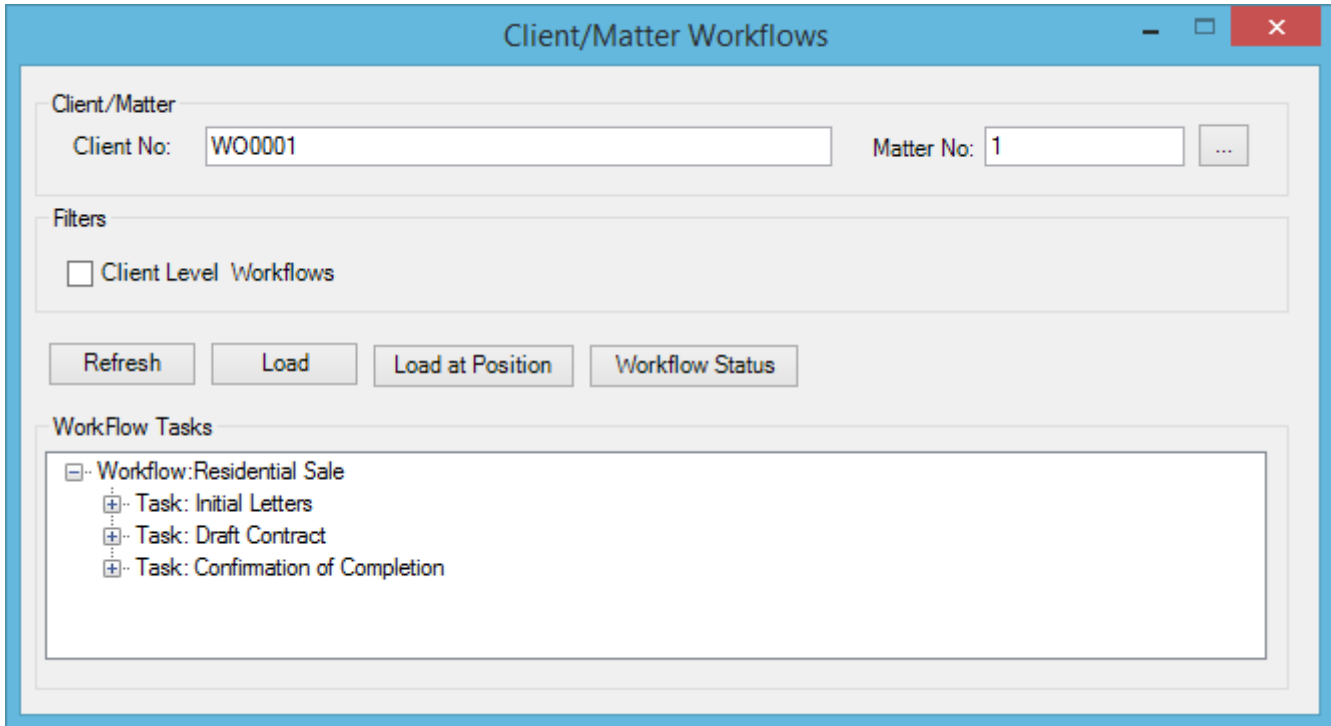
Either accept and save, or, if you wish to create a new document, rename and save. Your document will have now have saved into the client's matter history.

Workflows

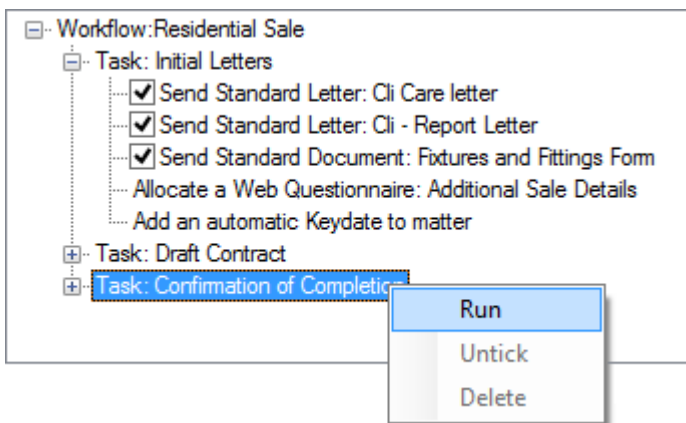
To load a Workflow, select the 'Workflows' icon under the OspreyTM tab. The client search panel will open.

Either enter in the client reference and matter number if known, or use the advanced client search as explained earlier in this document

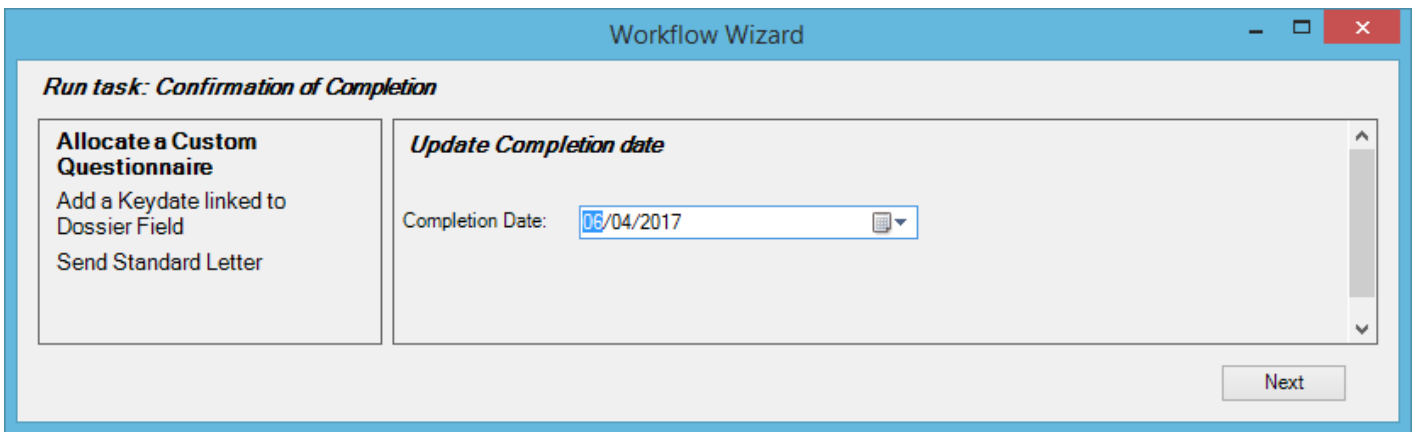
If you wish to load a client level workflow, ensure that you check the 'Client level Workflows' box, otherwise, select 'Load' to open a list of available workflows.



Right click a task to reveal a 'Run' button. (If you wish to view the content of a task prior to running it, click on the 'plus' sign to expand the content).

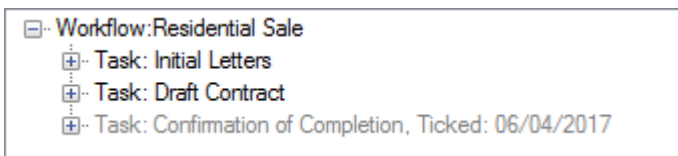


Click 'Run'. The system will then work through all of the attached actions in turn. A screen will appear showing details of the action currently being performed.

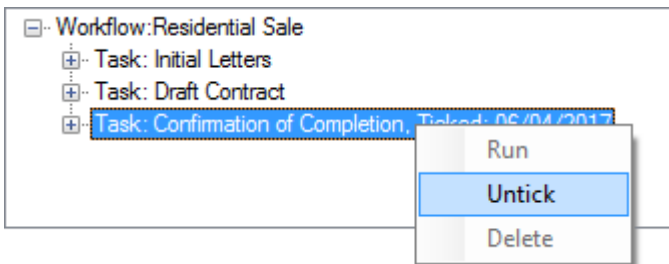


Click 'Next' after each action has run until the task has been completed

You will then be returned to the workflow screen and any tasks that have been run will now be greyed out. (If you run any letters through an action, save through the Word Add-In in the same way as previously explained. Once saved, you will be returned to the next workflow action)



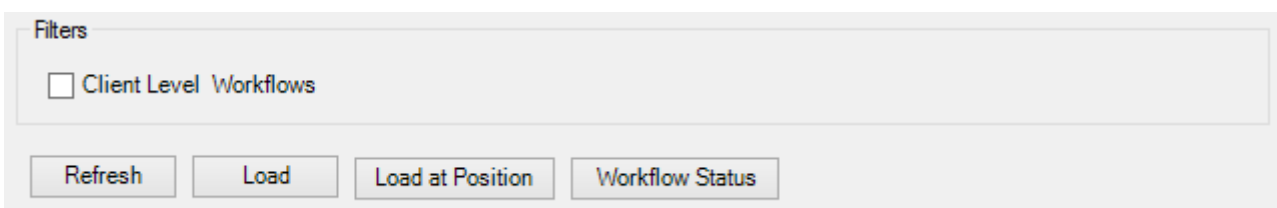
To untick a task, right click on a greyed out task and select the 'Untick' option to re-set it and make the task available to re-run.



If a workflow has been set as 'customise at matter level allowed', you can delete a task from within a workflow. Right click a task name and select the 'Delete' option. A warning will appear asking you to confirm the deletion of the task.

Click 'OK' to continue, or 'Cancel' to return to the workflow.

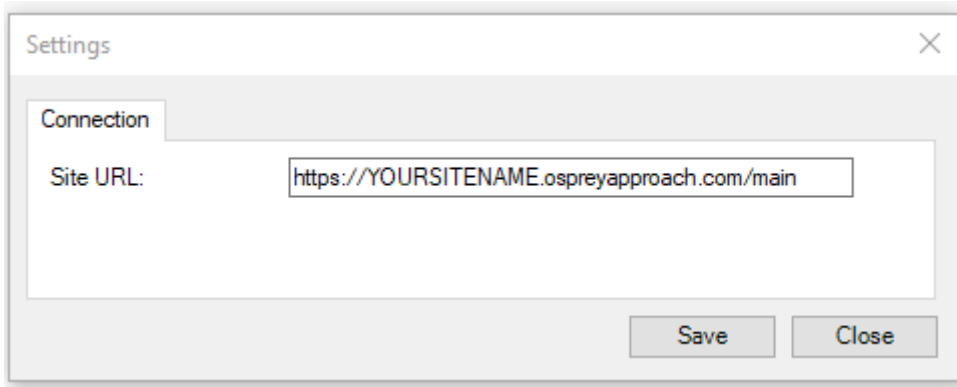
To restore a previously deleted task, click the 'Workflow Status' button.



The screen will show, in order, the last time a workflow was amended. Click the remove option and the deleted stage will be re-instated.

Click 'Load at Position' if you wish to load a workflow into an existing workflow (this is dependent on the workflow being set as 'Customise at matter level allowed').

Click the Settings button. You will need to enter your Osprey URL here:



The image shows a 'Settings' dialog box with a close button (X) in the top right corner. The dialog is titled 'Settings'. Under the 'Connection' tab, there is a 'Site URL:' label followed by a text input field containing the URL 'https://YOURSITENAME.ospreyapproach.com/main'. At the bottom of the dialog, there are two buttons: 'Save' and 'Close'.

Once you have entered and saved the URL, click the Login button on the Osprey™ menu and log in with your Osprey credentials.

You will now be able to save Excel documents directly to clients and matters. This functions in the same way as saving documents from Word.