

Osprey Approach: Install and use the Osprey Outlook add- in for Office 365

This help guide was last updated on
Sep 1st, 2023

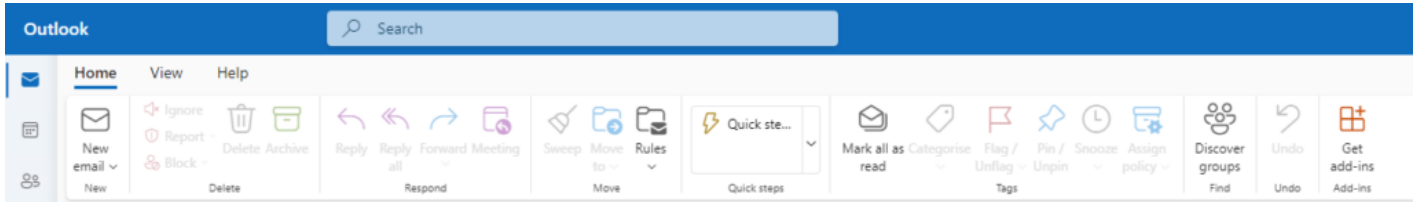
The latest version is always online at
<https://support.ospreyapproach.com/?p=16581>



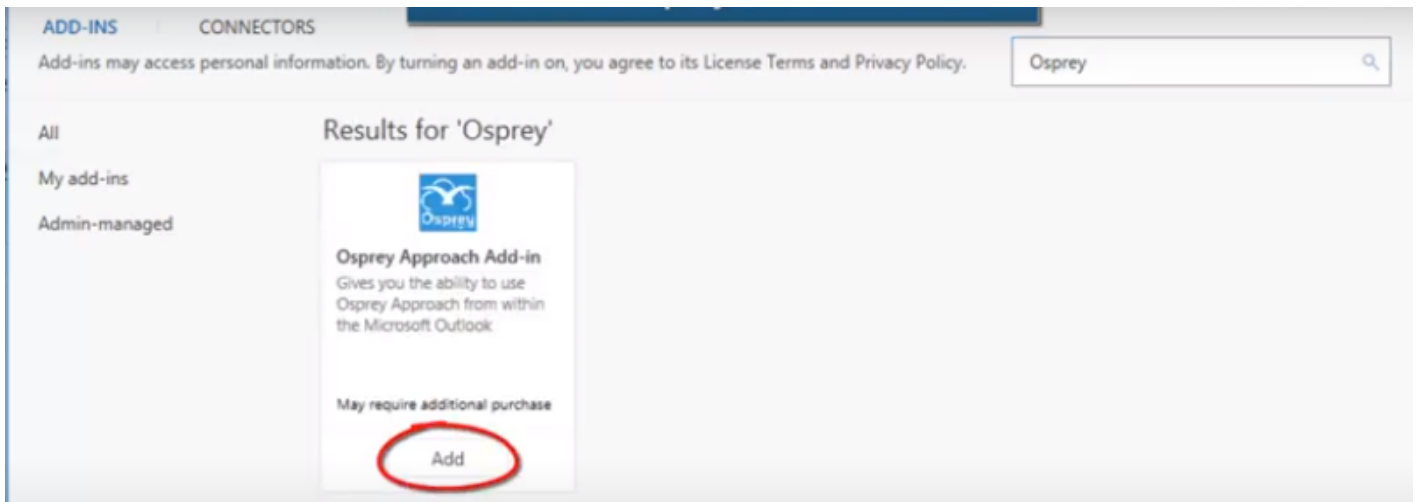
The Osprey Approach Outlook add-in can be installed from Office.com, or directly from Outlook, and will automatically be synced to all your devices.

Install from Outlook

To install the add-in, within Outlook, navigate to the Home tab and select **Get add-ins**.

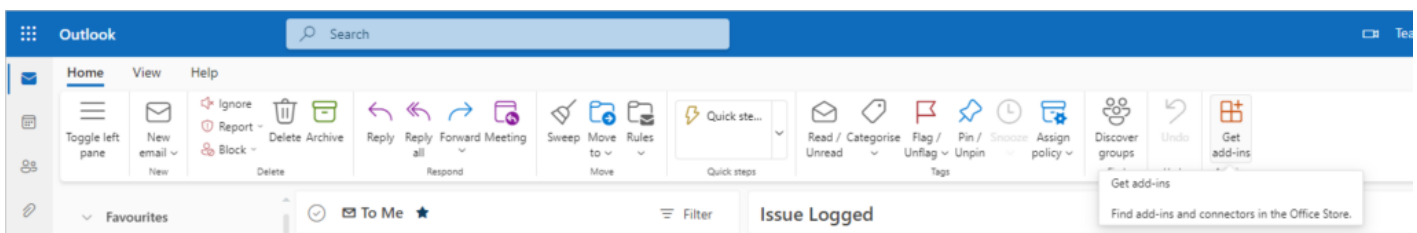


Search for Osprey and select **Add**.

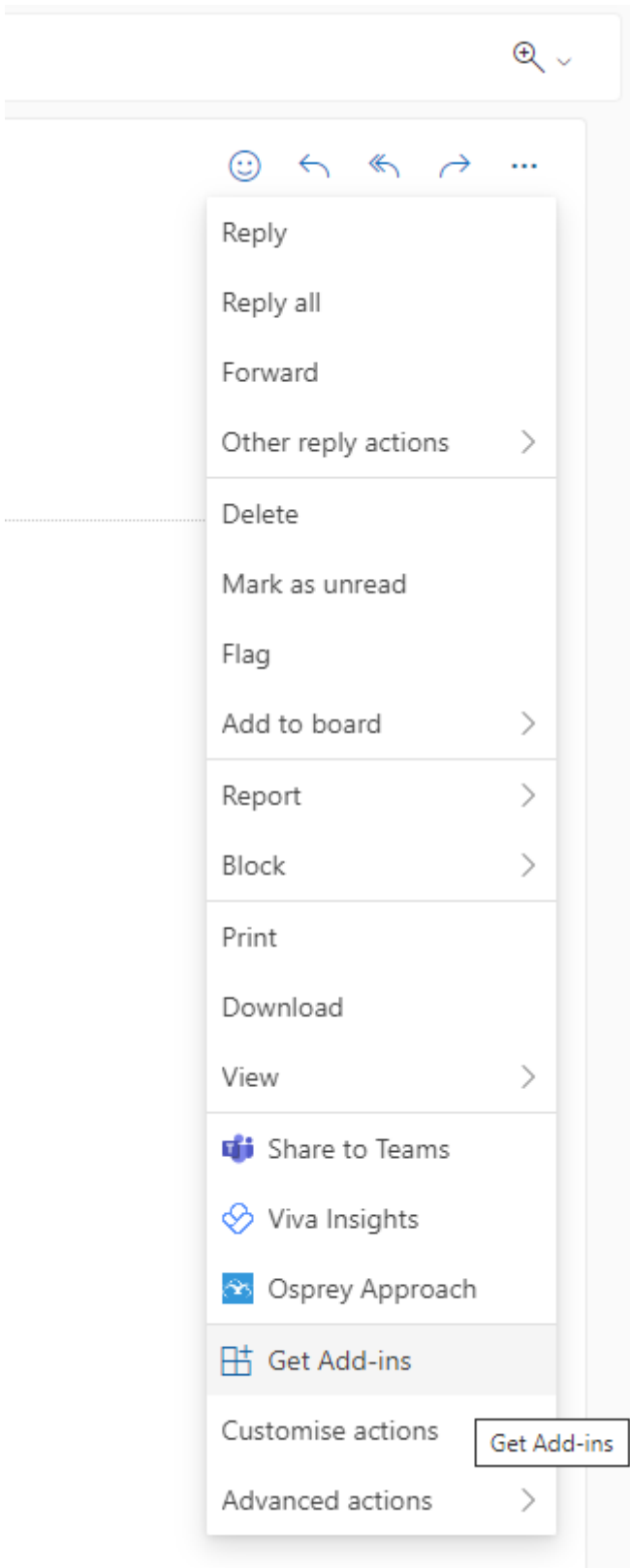


Install from Office Online

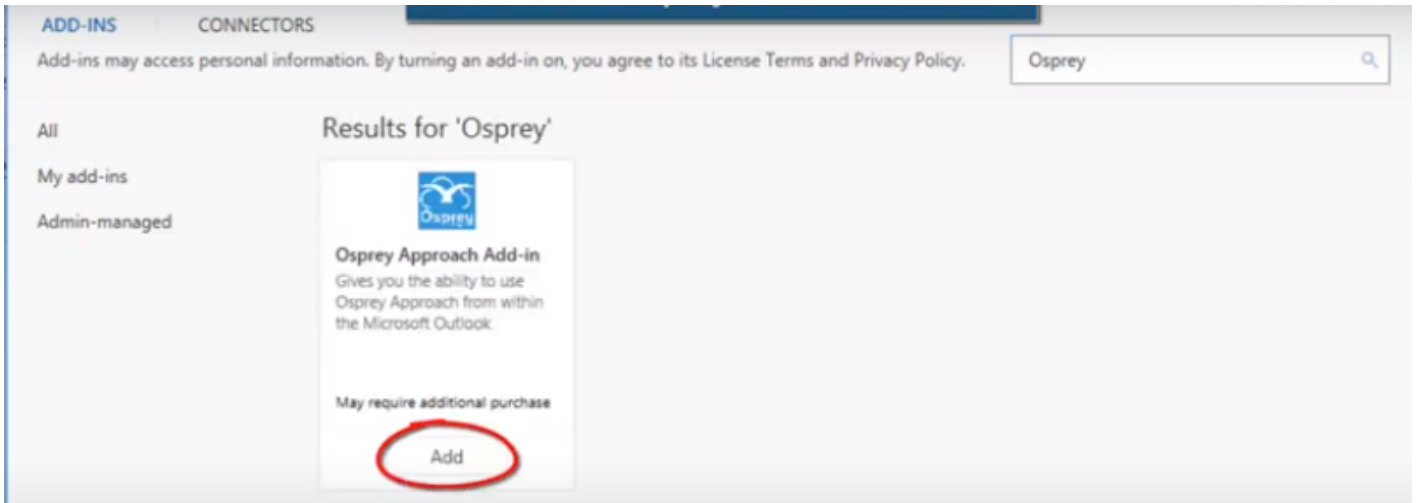
Go to <https://outlook.office.com/mail/> and select **Get add-ins** from the Home ribbon.



Alternatively, open an email, click the ... and select **Get add-ins** from the list.



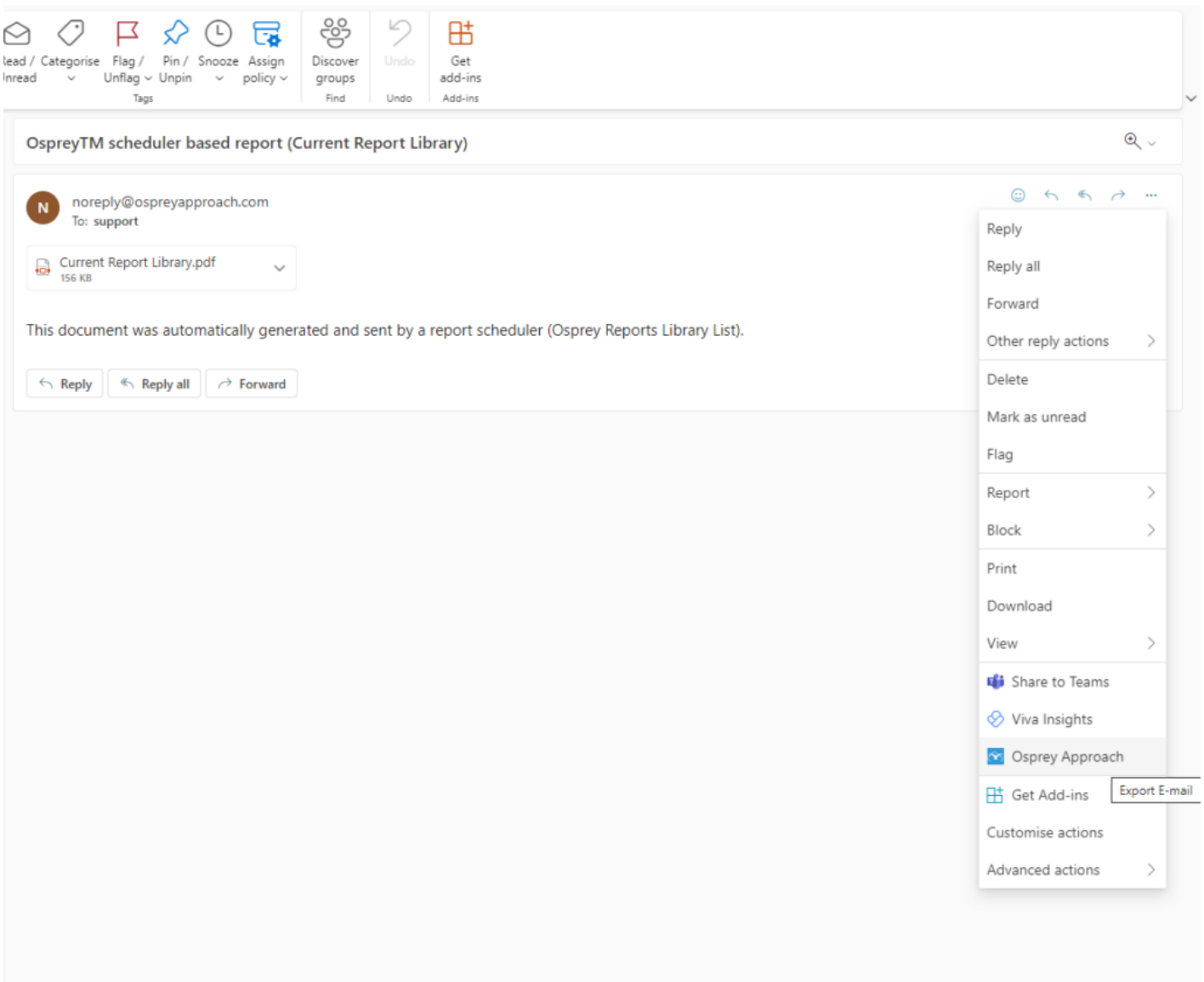
Search for Osprey, and click Add.



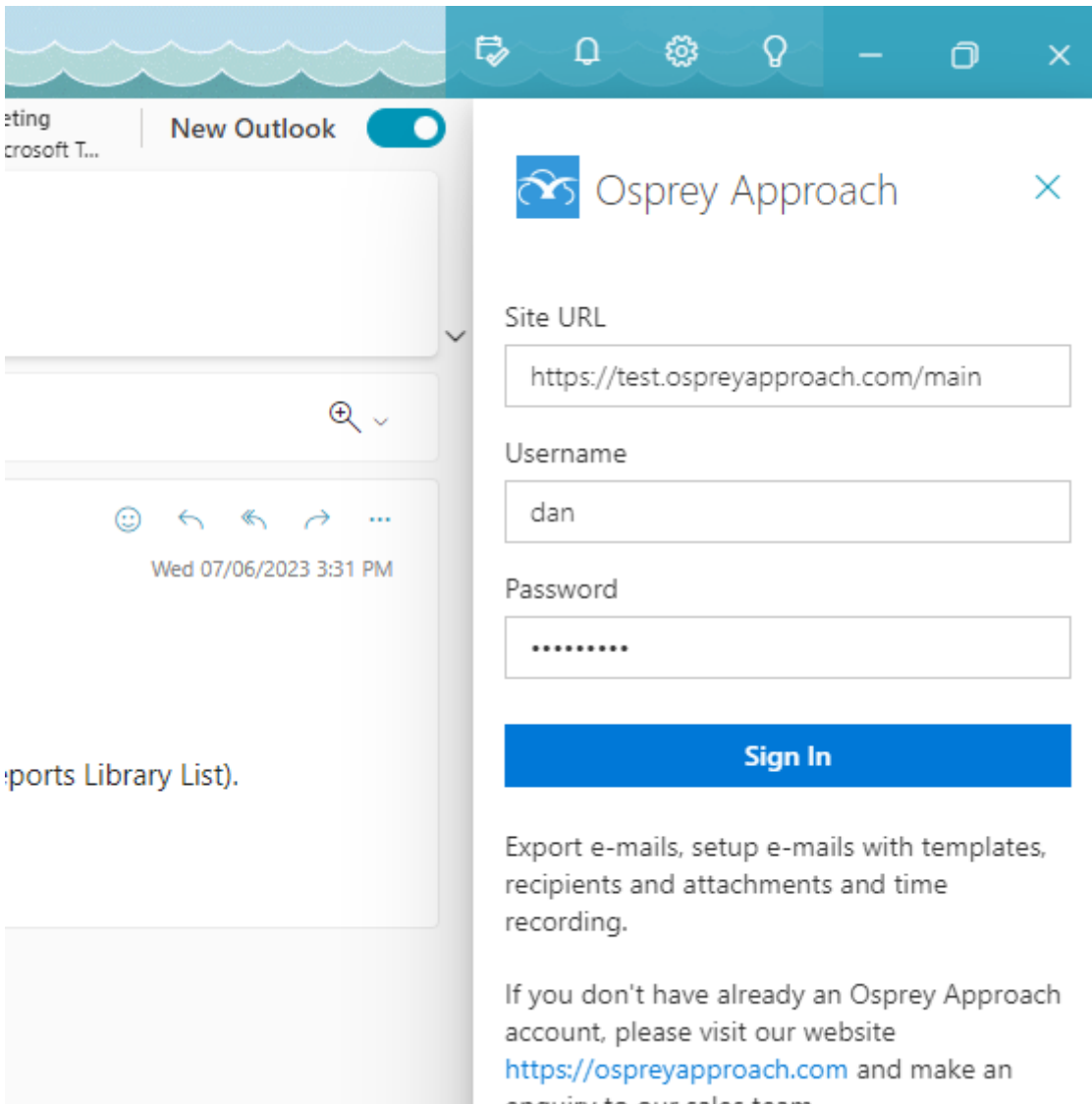
Export emails using the Office 365 Add-in

The Office 365 Add-in features the ability to export any emails and attachments.

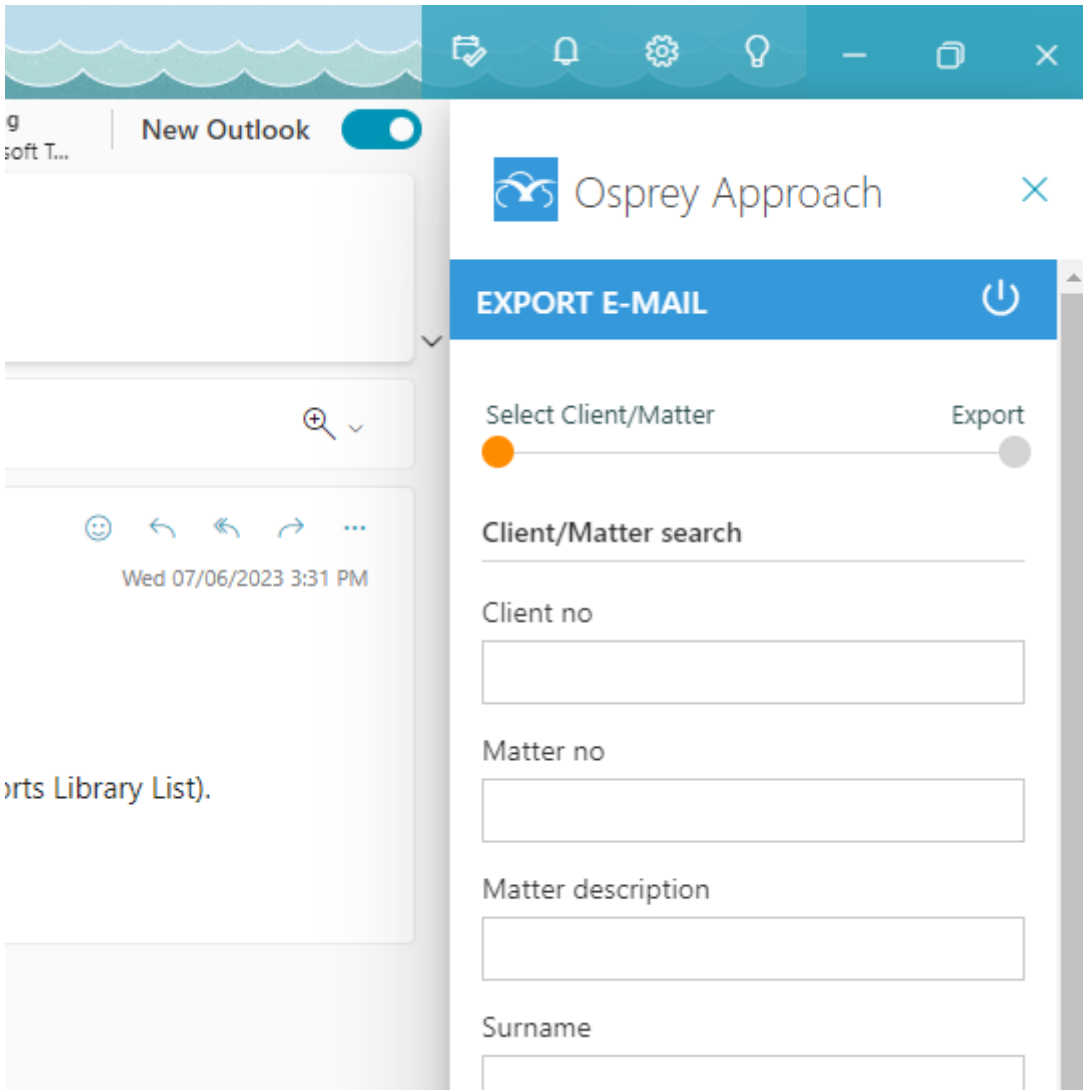
To Export, select the email and click the ... icon



Select Osprey Approach, and enter your Osprey URL and credentials.



If you know the client and matter you wish to export the email to, enter them, alternatively you may perform a search.



Once a client has been selected, you have several options to export.

Export details

Detail

Custom type

Folder

Retention period

Retention date

 Export e-mail only Time posting

Enter the detail of the email, which will display in the matter history.

You can also assign a custom type, select a Matter history folder and set a retention period.

To export the email only, tick the option. Ticking Time Posting will display the time recording options. Once completed, click Export.

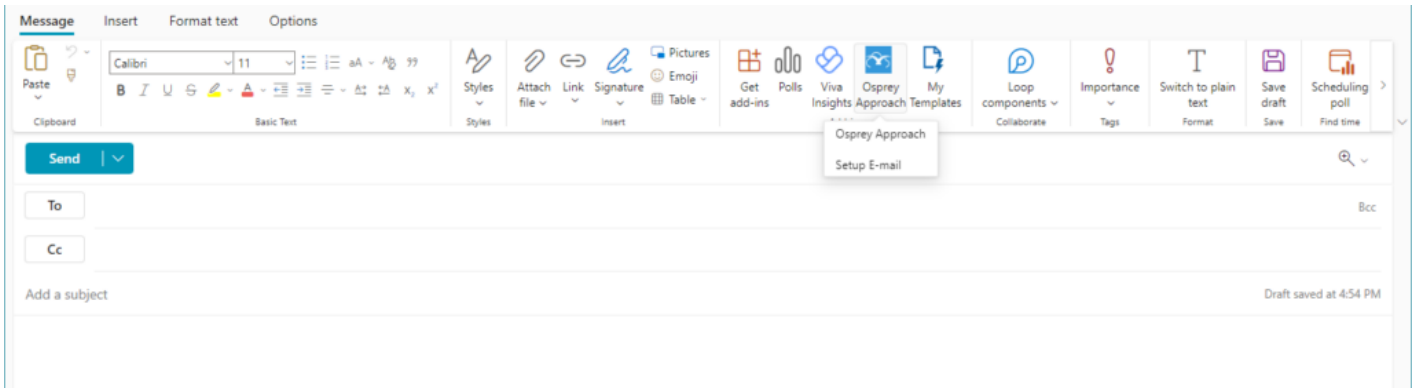
Your email and, if selected, any attachments will now have been saved to the Matter History.

| FAVORITE | TYPE | REF NUMBER | MATTER DESCRIPTION | DETAILS | RETENTION PERIOD |
|--------------------------|------|------------|-------------------------|-------------------|------------------|
| <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | | 98048 | Purchase 6 Anfield Road | Email from Client | 3 years |

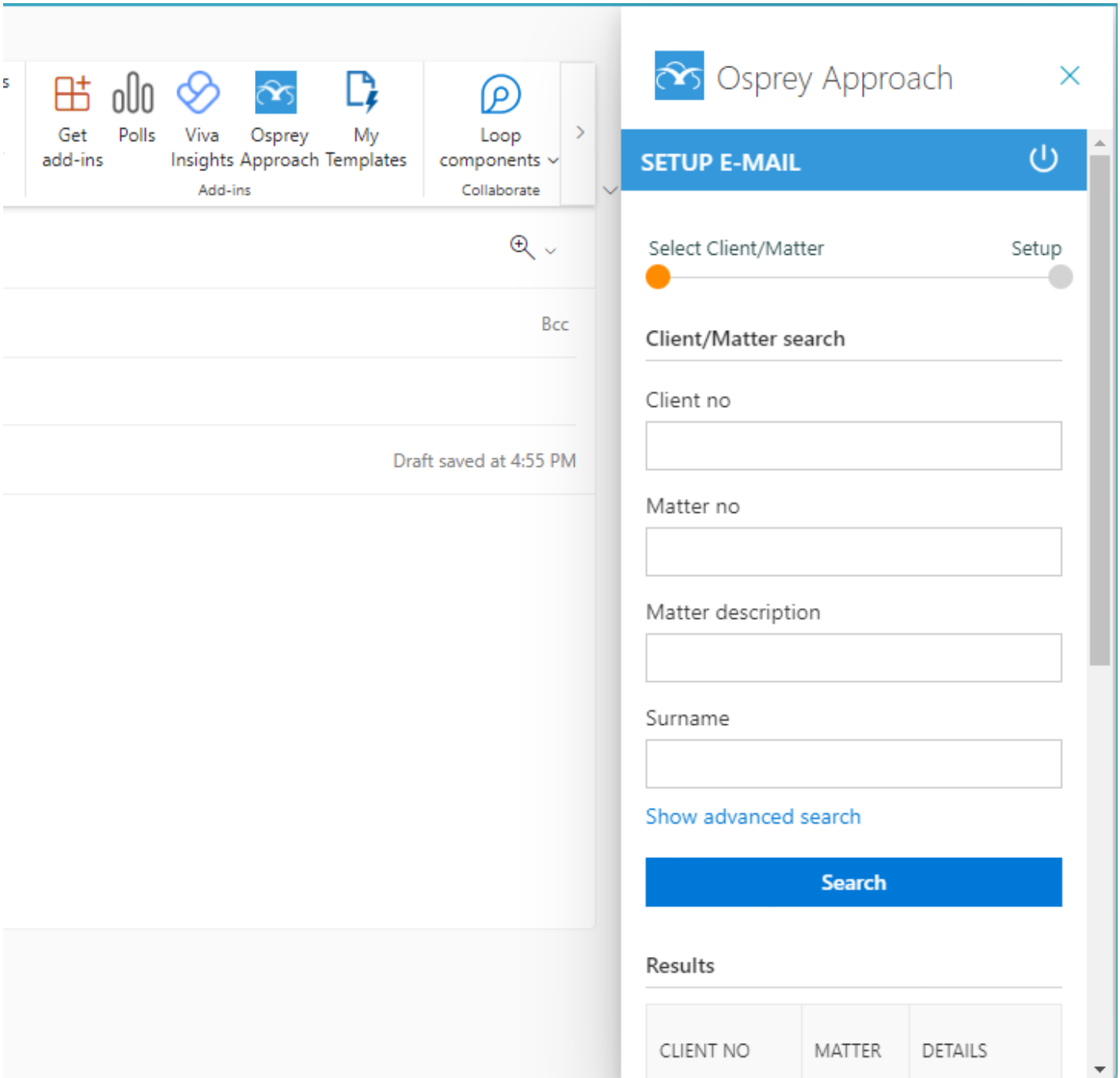
Compose emails using the Office 365 Add-in

When composing a new email, you can use the add-in to pull through information from Osprey, into Outlook.

First, open a new email, and locate the Osprey Approach icon. If you are not signed in, you will be asked to enter your credentials.

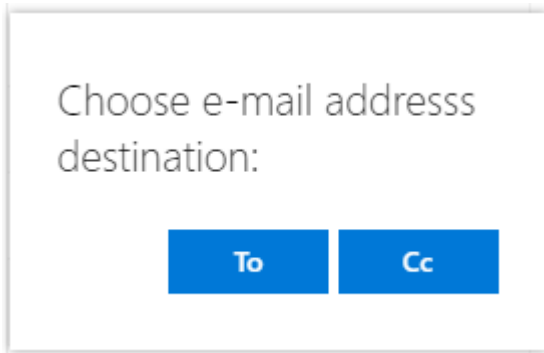


Now search for and select the appropriate matter

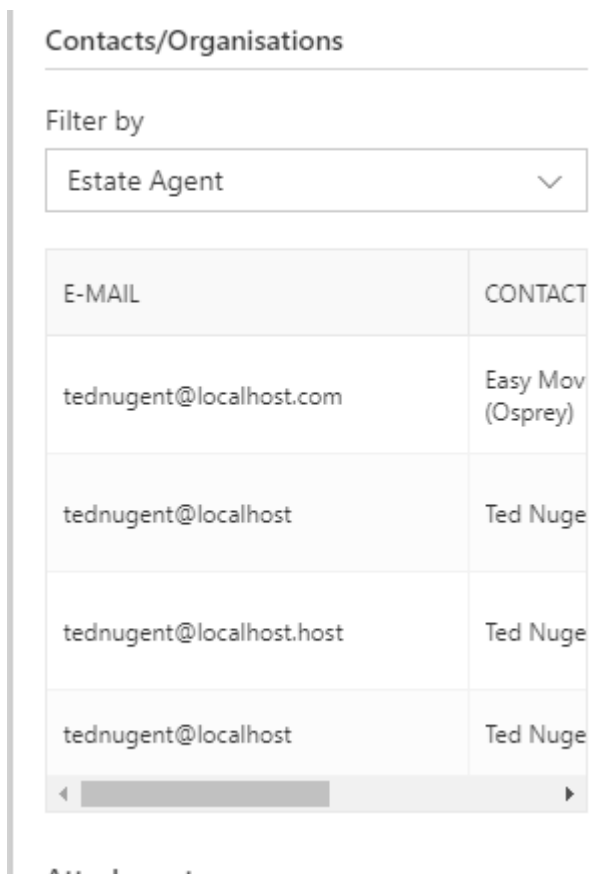


Once a client is selected, you can access any email templates, email addresses, matter history items or packages to bring into your email.

Left-click any email addresses to add them to the To/Cc fields



Scrolling down you can also choose an email address from your Contacts & Organisations.



Scrolling further you can also attach any document or package available in Osprey.

Attachments

Convert Word to PDF

| REF NUMBER | DETAILS | TYPE | CREATED |
|------------|--------------------------------------|------|------------------|
| 98048 | Email from Client | | 07/06/2016:51:50 |
| 97964 | ta13 | pdf | 10/05/2009:00:41 |
| 97963 | ta13 | pdf | 10/05/2008:59:07 |
| 97945 | ta13 | pdf | 09/05/2017:05:00 |
| 97922 | Transfer of part of registered title | pdf | 09/05/2013:45:47 |
| 97915 | Transfer of part of registered title | pdf | 09/05/2012:18:49 |
| 97914 | LPF1 No Merge | pdf | 09/05/2012:18:35 |

Export Sent Emails

Once an email has been sent, users will need to export from their Sent Folder.