Osprey Approach: New User FAQs

This help guide was last updated on
Sep 16th, 2025

The latest version is always online at
https://support.ospreyapproach.com/?p=73023

Click here for a printer-friendly version

Frequently asked questions from new users of Osprey

To help you get started on Osprey and to mitigate the stress and unknowns of using a new system, we've shared the important things you should know to get you up and running.

How do I access Osprey?

Osprey is a browser-based platform, this means you can use any browser of your choice (Microsoft Edge, Google Chrome, Safari etc) to access Osprey via a unique URL.

You'll then have a username and password to access your account.

Upon your first login of Osprey, you'll need to set your password which you can do by selecting 'forgot my password' and using your username to set a new one. Read this guide for help setting your password >

Will Osprey store my document templates?

Yes, document template will be stored in the document library in Osprey and accessible to be used for your clients and matters.

Some documents may be global – which means they can be accessed on all matters. Some template may be work type specific, which means they're only available for certain practice areas – like conveyancing.

The beauty of Osprey's document templates is they'll automatically populate with data stored in Osprey to save you hours re-keying information.

How do I create a document in Osprey?

Before producing documents in Osprey you will need to have the Osprey Gateway installed. The Osprey Gateway creates a connection to Microsoft Word. You will only need to install the Gateway once. See the guide to installing Osprey Gateway >

To create a document, locate the matter you want to create a document for and then select the 'new' button at the top right of the system and select 'Document'. From here you'll be able to access your template library, select the template you want, and then edit tehe document via Word.

Templates can be data mapped so key client and matter details can be automatically populated. Once you've finished editing, simply close Word to save directly into the Matter History.

Supervisor users of Osprey can upload and map additional document templates. Documents can also be created via a workflow if you firm is using them. Find our more about workflows here >

How do I find my clients and matters in Osprey?

There are many ways to search for clients and matters in Osprey. The global search in Osprey is very powerful and can help you locate client, matters, or documents. We also tools to provide quick access like the widget on the homepage dashboard that shows you your last accessed 20 matters, or the client & matter tables which provide a full list of client and matters in Osprey.

Discover how to find clients and matters easily in this guide >

Can I search for the matter reference from the previous system?

Yes you can. Even if you have a new reference in Osprey, you will still be able to search using the previous reference from your old system because the data has been imported to into a custom data field. Simply search for the reference in the global search bar (as mentioned above).

How do I find documents related to my case in Osprey?

The matter history contains all items relating to the client and matter, this includes documents, emails, attendance notes, images, PDFs, and more.

To access the Matter History, you first need to select the associated matter. See the information above for help finding clients and maters.

Once you've selected the matter you'll be taken to the Matter Workspace, which is the central hub for managing your matters. Across the top tabs you'll see 'Matter History', click on this to find a chronological order of all documents and correspondence. You can search for items within the matter history to make locating documents quicker. Find out how to search in the Matter History here >

Can you manage or export emails into Osprey?

Yes, we have a connection with Outlook (which will be set up during your PC set up before go-live) which means you can automatically export email from Outlook into Osprey. View guide on setting up the Outlook Connector >

You can also send emails from within Osprey too, so you don’t have to flip between systems. Emails sent from Osprey are also saved to your Outlook ‘sent’ folder.

How do I add a new client and matter to Osprey?

You can add a new client after running a conflict of interest search, or by clicking Client from the Master action menu.

The new client & matter tool will take you step-by-step through the required data fields needed to add a new clients and matter. Client numbers can be generated automatically as numeric (e.g. 0000001) or alphanumeric (e.g. HAR0001), alternatively you can set it to enter the client number manually.

Enter all of the details you have to hand for the client themselves, you may tick ‘This client is high-risk’, if desired. Should you need to add additional named clients, click ‘Add additional named clients’ to add the details for up to four more clients. When you have finished click Continue.

Find out more about adding a new client or matter >

Find out more about completing a conflict of interest search >

What happens if I forget the training during onboarding?

All Osprey users have access to unlimited, free training. Simply book on to future training sessions to improve your confidence or learn new features.

How do I get help using Osprey?

You’ll be able to contact our in-house support team of Osprey experts to guide you through. The service is telephone-first, so no need to chat to bots or wait for ticket updates.

You can also access the Osprey Academy, which is packed full of how-to guides.

How do I understand the Osprey terminology - it's not the same as my previous system?

Sometimes, different systems can refer to the same functionality but using different language. In Osprey you may have come across custom data pages, workflows, requisitions, and more. We have a glossary to help you out - view the Osprey glossary here >

What is a workflow?

A workflow is a software feature that enables process standardisation and automation. It’s a way to organise all tasks within a process so the users of the workflow follows a consistent path of actions, use the correct templates, and don’t miss a key task. Workflows are a great tool to mitigate risk and ensure compliance, especially in high risk practice areas or tasks.

Workflows are made up of tasks and actions that are necessary to complete a case management process, for example, onboarding a client. A workflow represents a process, each workflow is made up of tasks, and within tasks are a variety of automated actions.

Actions include preparing letters and other documents for your clients, diarising key dates, and filling in questionnaires to capture client and matter information. For guidance on how to run a workflow in Osprey please see this guide >

Osprey offers a library of templated workflows that can be imported into your site, or supervisor users can build workflow themselves.

Can I time record in Osprey?

Yes, time recording is a key feature in Osprey. You can time record in a number of different ways including setting timers, manually recording on matters, automatically when creating documents or emails, and via time sheets.
For more information, see the time recording guide >