



Osprey Approach: Getting Started: Quick-Setup Guide

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The latest version is always online at
<https://support.ospreyapproach.com/?p=15326>



What is the easiest way to get set up?

Installing the case management app from the Microsoft Store or installing the Osprey Gateway App really is the easiest way and you'll be going in a couple of minutes. We've got guides on how to do that.

Get Started: Install the Osprey Approach Apps

Configure: The Office Gateway App

Also, install the Office Connectors/Add-ins for Word and Outlook – they will enable you to generate documents and export emails really quickly.

For Users who have Office installed.

Configure: Osprey Connector for Microsoft Outlook

Configure: Osprey Connector for Microsoft Office

For users who use Office 365 online

Configure: Osprey Outlook Add-in for Office 365

Configure: Osprey Word Add-in for Office 365

How do I use the Case Management App on my PC?

The desktop apps are very easy to use and much of the functionality is self-explanatory. Once you have installed the app from the Microsoft Store, we recommend watching our short webinar and booking onto our Case Management App training course.

https://www.youtube.com/watch?v=_6asEVO4Ecs

What are my login details?

This will be your Osprey web address, your username and password.

- Your Osprey address will be
<https://yourcompanyname.ospreyapproach.com/main>
- Your username is what you use to log into Osprey with.
- And your password will be the same one you use in the office.

What if I have forgotten my password?

- A Supervisor level user will be able to reset your password.
- You can request a password reset by clicking on the 'Forgotten password' link on the login page in your browser, and entering your User ID

Both methods will send you an email with a one-time password allowing you to log into Osprey and change it to something more memorable.

Do I need to have Word and Outlook installed on my machine?

It is a more streamlined experience to use the locally installed versions of Word and Outlook, but it is not necessary.

If you have Office 365, the add-ins for Word and Outlook work well in the web versions of Word and Outlook. You can still generate and edit documents in the web version of Word, and you can still export emails into the matter history from the web version of Outlook as you usually would.

Use the links above for Office 365

Is it safe to use Osprey on my home internet connection?

Yes, it is absolutely safe. You can only connect to Osprey through a secure SSL encrypted connection – that's the little padlock you see in your browser when you use banking sites and the like.

It just means everything you send and receive from your machine to Osprey is encrypted and can't be viewed or manipulated.

Do I have to store client data on my personal computer to use Osprey at home?

If you are using your personal computer to work from home, you needn't worry about client data being stored on it. Everything you need to do in Osprey can be done without the need to store anything locally on your machine. The benefit of Osprey is that all the information is stored in the cloud.

Our Case Management app don't store things on your machine - the app sits locally but the data doesn't. The apps are basically a way to interact with the Osprey database, which always sits safely in the cloud on our servers.

If you install Outlook, then copies of your emails will be downloaded to the machine you're on – so be aware of that. But the web versions of Word and Outlook don't save anything to your machine.

When you're ready to return to work simply uninstall the Osprey apps and you're done. Don't worry, uninstalling the apps won't remove the data!