



Osprey Approach: Show Key Dates in Outlook

This help guide was last updated on
Jul 3rd, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=802>



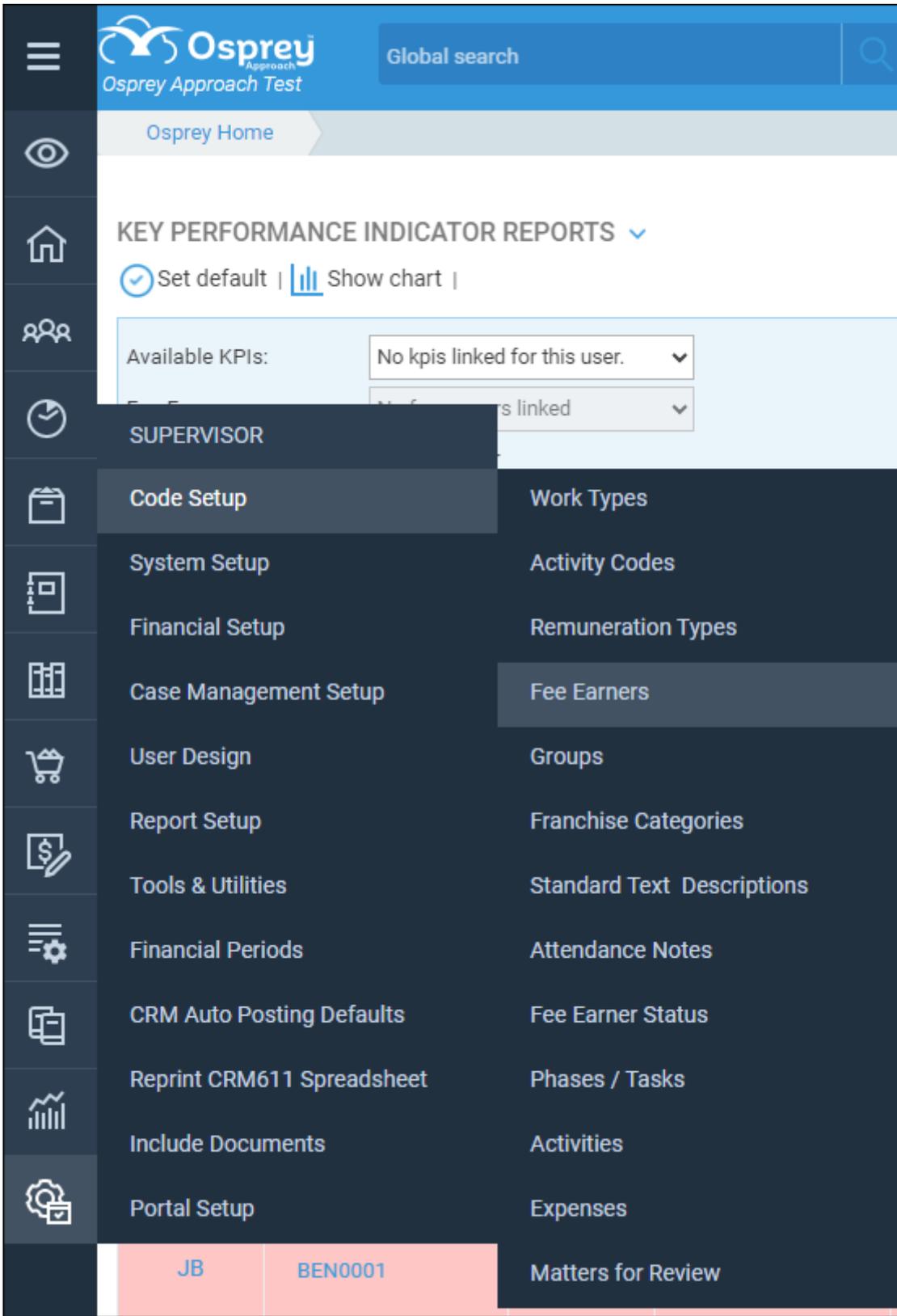
This guide will go through how to display key dates within your Outlook calendar

Osprey allows you to display any key dates present on your files in Outlook, so you can see at a glance if you have any appointments coming up relevant to your cases.

Please Note: This feature will only work if your email domain is on our Hosted Exchange or the Office 365 cloud. Clients with their emails hosted in other locations will not be able to use this service.

Add the Office 365 credentials

Firstly, you must ensure that the relevant fee earner has their email credentials saved against their Osprey fee earner code.



Navigate to Supervisor > Code Setup > Fee Earners.

Now right click on the relevant fee earner



Select Edit

Enter their email address and password for the email account.

F/E:

Fee Earner Description:

Time Spent Target (Monthly):

Time Value Target (Monthly):

La Supplier No:

Fee Earner Status:

Phone No:

Mobile No:

 Ensure you use your Exchange Credentials in order for Exchange Integration to function correctly.

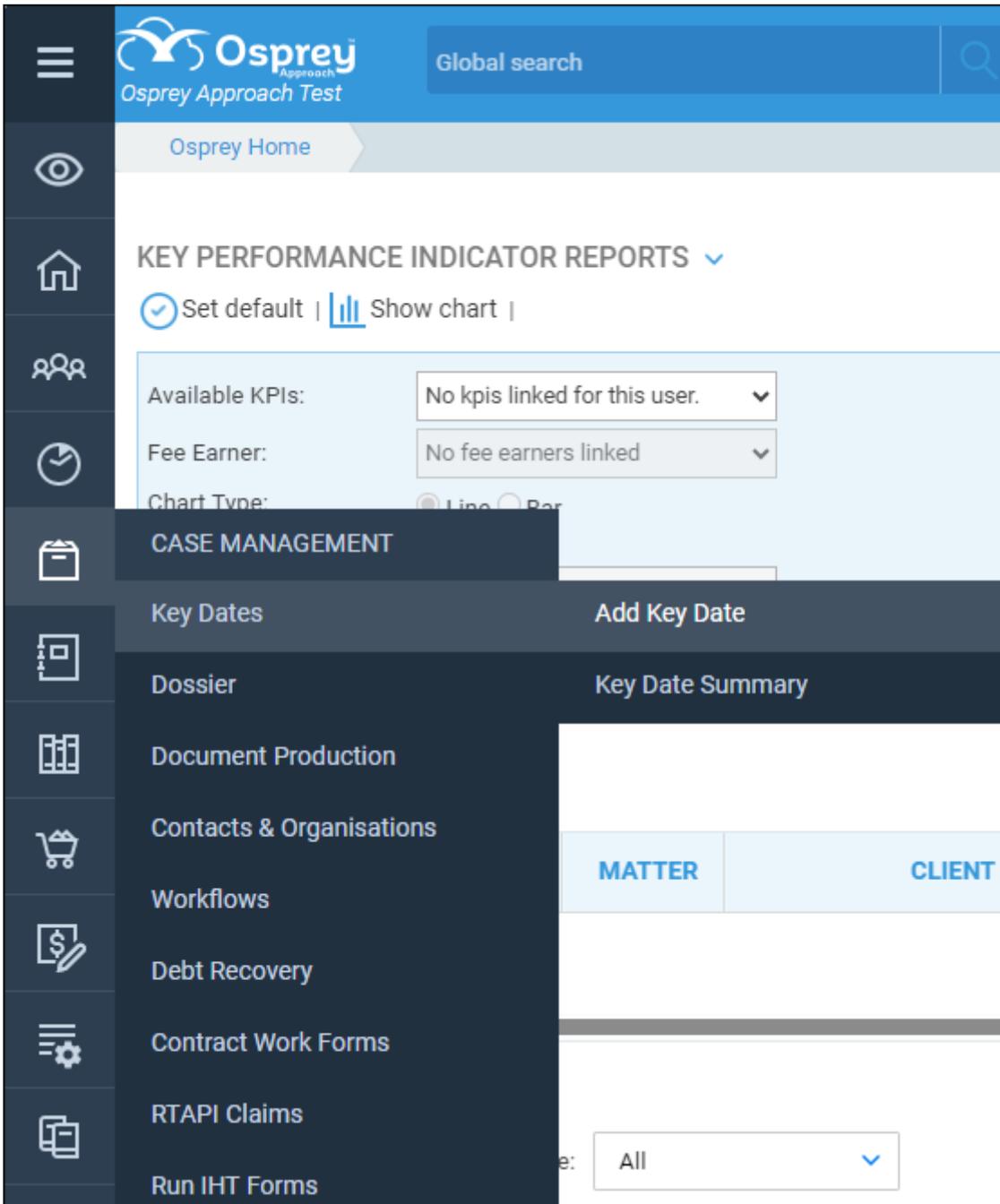
 Email Address:

 Password:

 Confirm Password:

Now click the Save button. This fee earner will now be able to save a key date and add it to the Fee earners calendar.

Create a key date in browser



Navigate to Case Management > Key Dates > Add Key Date.

Now fill in the details, ensuring that you tick the Add Diary Appointment tick box. You can also select a specific time if you wish, or just set the appointment as an all day appointment.

Save Cancel

Client No: A00013

Matter No: 5

Key Date: 18/07/2019

Key Date Type: 10WEEK

Notes: N/A

Fee Earner: SM Multi Select

Date Met?

Create Diary Appointment? All Day At 09:00

Published?

Click Save to add this key date to your Outlook calendar.

Create a Key Date in the Case Management App

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS

TIME RECORDING

CASE MANAGEMENT

Pre-action stage

Case Management - BEN0001/2 (Ben

Change Client/Matter Email

KEYDATES DOCUMENTS WORKFLOWS

+ Add Key Date

EDIT	DELETE	KEY DATE
		06/07/2024

Now fill in the details, ensuring that you tick the Add Diary Appointment tick box. You can also select a specific time if you wish, or just set the appointment as an all day appointment.

Add New Key Date



Save

Fee Earner

Craig Matthews

Additional Fee Earners

- Dave Dingle
- David Brown
- Dragos Raduc
- Ethan Green
- Martyn Wells

Date Met

Create Diary Appointment?

All Day At

Published?

Click Save to add this key date to your Outlook calendar.