



# Osprey Approach: Show Key Dates in Outlook

This help guide was last updated on  
Dec 22nd, 2022

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




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

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


 **Osprey**  
Approach  
Osprey Approach Test

Today's Units: 0  
Today's Time: 00h:00m  
Today's Value: £0.00

Global search

Osprey Home

### KEY PERFORMANCE INDICATOR REPORTS ▾


Set default |  Refresh chart |  Print

Available KPIs:  ▾

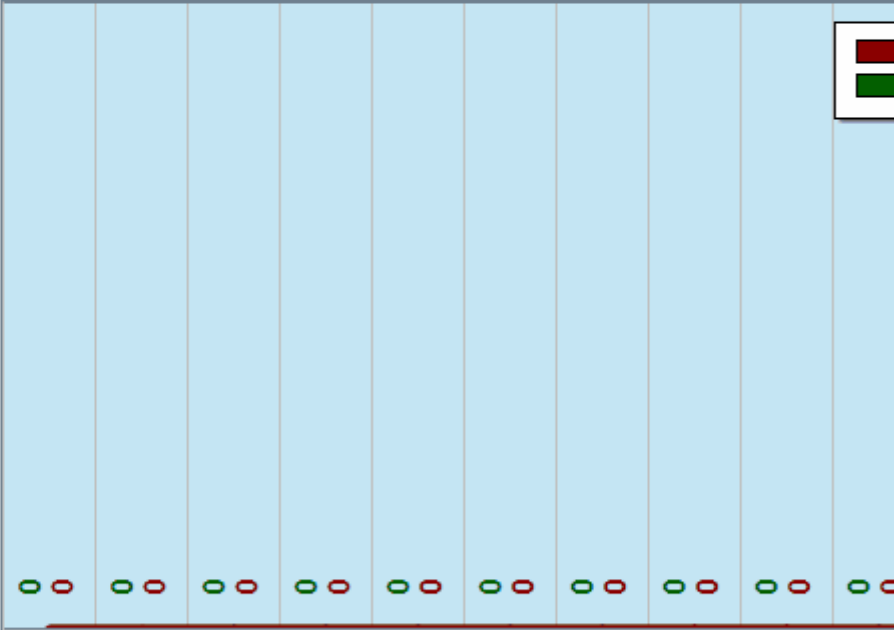
Fee Earner:  ▾ [Multi Select](#)

Chart Type:  Line  Bar

Show Labels:

Target:  

#### Completed Matters



February

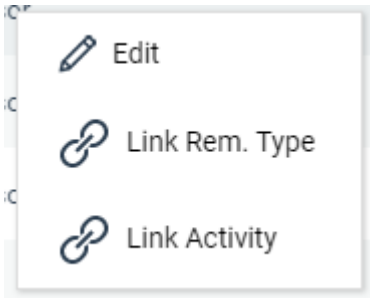
Month

Selected Fee Earner(s): Constantin Onu Fee Earner (Description field)

### MATTERS FOR REVIEW ▾

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:	<input type="text" value="JMT"/>
Fee Earner Description:	<input type="text" value="Jane Thomas"/>
Time Spent Target (Monthly):	<input type="text" value="0"/>
Time Value Target (Monthly):	<input type="text" value="0.00"/>
La Supplier No:	<input type="text"/>
Fee Earner Status:	<input type="text" value="Solicitor"/>
Phone No:	<input type="text"/>
Mobile No:	<input type="text"/>

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

	Email Address:	<input type="text"/>
	Password:	<input type="password"/>
	Confirm Password	<input type="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.

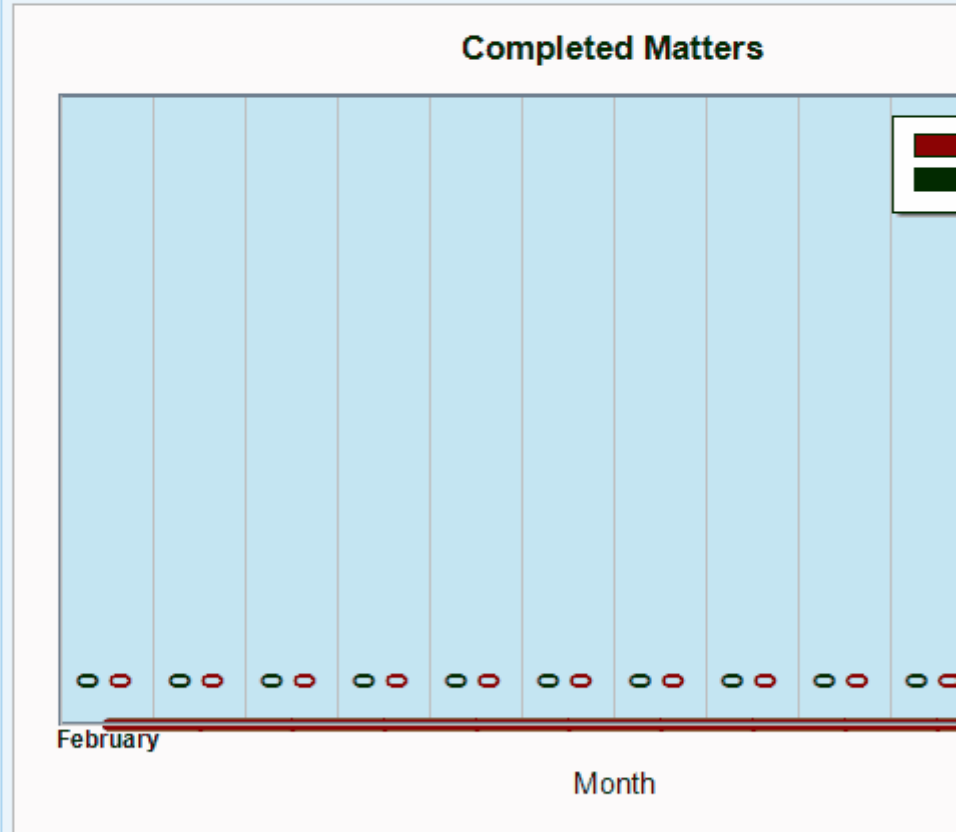
## Create a Key Date in browser

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KEY PERFORMANCE INDICATOR REPORTS

Set default | Refresh chart | Print

Available KPIs: Completed Matters  
Fee Earner: Constantin Onu Fee Earner (Des) Multi Select  
Chart Type: Line Bar  
Show Labels:   
Target: 0







Selected Fee Earner(s): Constantin Onu Fee Earner (Description field)

MATTERS FOR REVIEW

Refresh

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.

Client No	<input type="text" value="A00013"/>
Matter No	<input type="text" value="5"/>
Key Date	<input type="text" value="18/07/2019"/> 
Key Date Type	<input type="text" value="10WEEK"/> 
Notes	<input type="text" value="N/A"/>
Fee Earner	<input type="text" value="SM"/>  <input checked="" type="checkbox"/> Multi Select
Date Met ?	<input type="checkbox"/>
Create Diary Appointment ?	<input checked="" type="checkbox"/> All Day <input checked="" type="checkbox"/> At <input type="text" value="09:00"/> 
Published ?	<input type="checkbox"/>

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

## Create a Key Date in the Case Management App

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Osprey Browser App

Home

Client/Matter +

Case Management

Client Ledgers

Banks & Journals +

Contacts

Organisations

Case Bundle

Packages

Time Recording +

Reports +

Help

Sign Out

Today's Units: 0

Today's Time: 00h:00m Global se

Today's Value: £0.00

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Completed File Opening

### Home - B00002/1 (Braithwaite Ne

#### MATTERS FOR REVIEW

CLIENT	MATTER	CLIENT NA
B00002	10	Braithwa
B00002	11	Braithwa
B00002	8	Braithwa
B00002	12	Braithwa
WOO00006	1	Wood Ri

#### YOUR KEY DATES

CLIENT	MATTER	CLIENT NAM
B00002	1	Braithwaite

Navigate to Case Management > 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.

## 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.