

Osprey Approach: Show Key Dates in Outlook

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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.

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ŵ	KEY PERFORMANCE INDICATOR REPORTS ✓ Set default Show chart					
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Ē	Code Setup			Work Types		
ŧΞ	System Setup			Activity Codes		
	Financial Setup			Remuneration Type	es	
	Case Management Setup			Fee Earners		
\$\$	User Design			Groups		
<u>ি</u>	Report Setup			Franchise Categori	es	
	Tools & Utilities		Standard Text Descriptions			
•	Financial Periods			Attendance Notes		
Ē	CRM Auto Posting Defaults			Fee Earner Status		
~~.	Reprint CRM611 Spreadsheet			Phases / Tasks		
inn	Include Documents			Activities		
(Ĉ	Portal Setup			Expenses		
	JB	BEN000	1	Matters for Review		

Navigate to Supervisor > Code Setup > Fee Earners.

Now right click on the relevant fee earner



Enter their email address and password for the email account.

🖹 Save	S Cancel ☐ Archive ↑ Transfer all matters				
F/E:	JMT				
Fee Earner Description:	Jane Thomas				
Time Spent Ta (Monthly):	urget 0				
Time Value Ta (Monthly):	urget 0.00				
La Supplier No					
Fee Earner Sta	solicitor 🗸				
Phone No:					
Mobile No:					
() Ensure	DEnsure you use your Exchange Credentials in order for Exchange Integration to function correctly.				
Email Address					
Password:					
Confirm Passy	word				

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

≡	Osprey Approach Test	Global search			
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G	Fee Earner: Chart Type:	No fee earners linked			
Ê	CASE MANAGEMENT				
Ð	Key Dates	Add Key Date			
甜	Document Production				
\	Contacts & Organisation	IS MATTER CLIENT I			
\$	Workflows Debt Recovery				
	Contract Work Forms				
Ē	RTAPI Claims Run IHT Forms	e: All 🗸			

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	ତ
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



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	6
← Save	
Fee Earner	
Craig Matthews	
Additional Fee Earners Dave Dingle	
David Brown	
Dragos Raduc	
Ethan Green	
Martyn Wells	
Date Met	
All Day At 09:00 V	
Published?	

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