



Osprey Approach: Uploading Emails

This help guide was last updated on
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The latest version is always online at
<https://support.ospreyapproach.com/?p=61002>



For best functionality, Osprey recommends that e-mails be exported into Osprey using the Osprey Outlook COM add-in or Office 365 Add-in.

Drag & Drop vs Email Exporting

When an email is saved onto the local PC, it creates an Outlook file, which can only be opened by Outlook.

When this is uploaded into Osprey, users are limited with functionality - emails can only be viewed or replied to by downloading the email and opening within Outlook.

The screenshot displays the Osprey Case Management interface. At the top, there is a header with the Osprey logo, 'Osprey Approach Test', and user information: 'Today's Units: 0', 'Today's Time: 00h:00m', and 'Today's Value: £0.00'. A 'Global search' bar is also present. Below the header, the 'Case Management' section shows '100003/1 (O'Wilson) FE:DH WT:FWRCP PU'. A context menu is open over the email list, showing options like 'New', 'Send E-mail', 'Edit Details', 'Clone', 'Check Out', 'Delete', 'Preview', 'Download', 'View Details', 'View Revision History', 'View Security', 'Subscribe to Notifications', 'Unsubscribe All Notifications', 'Add Retention Policy', 'Change Owner', 'Publish to Deal Room', 'Finalize Version', and 'Refresh'. The email list has columns for 'FAVORITE', 'TYPE', 'REF NUMBER', 'DETAILS', and 'CREATED DATE'. The selected email is 'Test Email With Pipes.msg' with Ref Number 98153, created on 30/06/2023 at 10:37:34. To the right, the 'Item Details' panel shows 'General Info' and 'Record Info' for this email.

FAVORITE	TYPE	REF NUMBER	DETAILS	CREATED DATE
★	📧	98170	Outlook imported e-mail	06/07/2023 10:43:42
★	📧	98162	Client 100003: Matter 1: Re	05/07/2023 10:54:28
★	📎	98159	20MB.bin	30/06/2023 17:46:15
★	📧	98158	Outlook imported e-mail	30/06/2023 17:44:36
★	📧	98157	Filing Appeal - Party Wall A	30/06/2023 14:31:15
★	📧	98155	Filing Appeal - Party Wall A	30/06/2023 10:55:33
★	📧	98154	Email to court (Reply)	30/06/2023 10:55:31
★	📧	98153	Test Email With Pipes.msg	30/06/2023 10:37:34
★	📧	98152	Outlook imported e-mail	30/06/2023 10:37:31
★	📧	98136	Client 100003: Matter 1: Archived by dan. Reference Location	27/06/2023 17:37:08

General Info

Ref Number	98153
Client No	100003 (O'Wilson)
Matter No	1 (Purchase 6 Anfield Road)
Folder Path	
Custom Type	
Web Enabled	No
Details	Test Email With Pipes.msg

Record Info

Owner	dan
Created By	dan
Created Date	30-06-2023 09:37:34
Processed Date	30-06-2023 09:37:34
Last Modified By	dan
Last Modified Date	30-06-2023 09:37:34

When an email is exported, Osprey extracts all the data from within the email, allowing users to preview, reply, forward and download the email, with any attachments easily accessible from the Attachments tab.

The screenshot displays the Osprey Case Management interface. At the top, the Osprey logo and 'Osprey Approach Test' are visible. The header includes 'Today's Units: 0', 'Today's Time: 00h:00m', and 'Today's Value: £0.00'. A 'Global search' bar is present. Below the header, the case management details show 'Case Management 100003/1 (O'Wilson) FE:DH WT:FWRCP Purchase 6 Anfield Road'. The interface includes a navigation bar with options like 'New', 'Send E-mail', 'Reply', 'Reply all', 'Forward', and 'Download'. A table lists email items with columns for 'FAVORITE', 'TYPE', 'REF NUMBER', 'DETAILS', and 'CREATED DATE'. The selected email (REF NUMBER 119536) is 'Outlook imported e-mail *' with a 'CREATED DATE' of 25/10/2023 16:51:13. The right-hand pane shows 'Item Details' for the selected email, including 'Client No: 100003 (O'Wilson)', 'Matter No: 1 (Purchase 6 Anfield Road)', and 'Email Info' with 'Date: 25-10-2023 15:51:31', 'From: Daniel Hearne-Daniel@practice.net>', 'To: Daniel Hearne-Daniel@practice.net>', and 'Subject: FW: OspreyTM scheduler based report (Current Report Library) (ClientRef:100003/1)'. The bottom of the interface shows pagination: 'Page 5 of 36' and 'Showing 81 - 100 of 707'.

Secure Emails

Email providers such as CJSM offer secure emails from their dedicated email systems.

Because of the security provided by these services, it may not be possible to export these emails into Osprey.

If you require copies of any emails from these systems, we recommend contacting the email provider to see if they offer any Outlook add-ins to access these emails within Outlook to export via the Osprey Outlook Connector.

If this is not possible, you may choose to print the email to PDF (go to print and select Print to PDF as your desired printer) and upload the PDF printout to Osprey. Doing so will of course remove any security features provided by the email hosting service.