



Osprey Approach: Uploading Emails

This help guide was last updated on
Dec 29th, 2023

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.

Osprey

Osprey Approach Test

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

Case Management

100003/1 (O'Wilson) FE:DH WT:FWRCP Pu

Client No: 100003

Global: ☐

Matter No: 1

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

Refresh

FAVORITE	TYPE	REF NUMBER	DETAILS	CREATED DATE	CR
★		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	

Item Details

Security

Revision History

General Info

Record 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

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.

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

Case Management

100003/1 (O'Wilson) FE:DH WT:FWRCP Purchase 6 Anfield Road

Client No: 100003

Global: ☐

Matter No: 1

Set permissions

Keyword search:

Selected for sign request (0) From:

New

Send E-mail

Reply

Reply all

Forward

Download

FAVORITE	TYPE	REF NUMBER	DETAILS	CREATED DATE
★	📄	119548	note	26/10/2023 12:13:28
★	📄	119545	Fw Documents requested Scanned.msg	26/10/2023 11:53:39
★	📄	119538	FW: OspreyTM scheduler based report (ClientRef:100003/1)	25/10/2023 16:51:28
★	📄	119537	Current Report Library.pdf	25/10/2023 16:51:15
★	📄	119536	Outlook imported e-mail *	25/10/2023 16:51:13
★	📄	119383	Sent e-mail (Subject: Email Regarding Case: Purchase 6 Anfield Ro...	06/10/2023 15:02:18
★	📄	119382	Sent e-mail	06/10/2023 15:00:35
★	📄	119381	Sent e-mail (Subject: Email Regarding Case: Purchase 6 Anfield Ro...	06/10/2023 14:58:58
★	📄	119380	Sent e-mail (Subject: Email Regarding Case: Purchase 6 Anfield Ro...	06/10/2023 14:44:16
★	📄	119379	Sent e-mail (Subject: Email Regarding Case: Purchase 6 Anfield Ro...	06/10/2023 14:39:26

Item Details

Security

Attachments

Client No

100003 (O'Wilson)

Matter No

1 (Purchase 6 Anfield Road)

Folder Path

Custom Type

Web Enabled

No

Details

Outlook imported e-mail *

Email Info

Date

25-10-2023 15:51:31

From

Daniel Hearne<Daniel@pracctice.net>

To

Daniel Hearne<Daniel@pracctice.net>

Subject

FW: OspreyTM scheduler based report (Current Report Library) (ClientRef:100003/1)

From:

noreply@ospreyapproach.com

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.