

Osprey Approach: Use the Outlook Web Osprey Approach Add-in

This help guide was last updated on
Jul 29th, 2020

The latest version is always online at
<https://support.ospreyapproach.com/?p=17714>



The Osprey Approach Add-in allows you to export emails to Osprey Matter History, in new emails you may retrieve email addresses and Matter History items as attachments.

Log into Outlook Web at:

<https://outlook.office.com>

Exporting Messages

Select a message to export



is addressed. If you are not the intended
or disclose the contents of this message.
Justice Limited who will not accept any
from the E Mails use, including from a

Select the ellipsis and then Osprey Approach Add-in

The add-in will open and you will need to log into with your Osprey URL and credentials.

Site URL

Username

Password



Sign In

Search for the matter you wish to export the message to



Select Client/Matter

Export

Client/Matter search

Client no

Matter no

Matter description

Surname

[Show advanced search](#)

Results

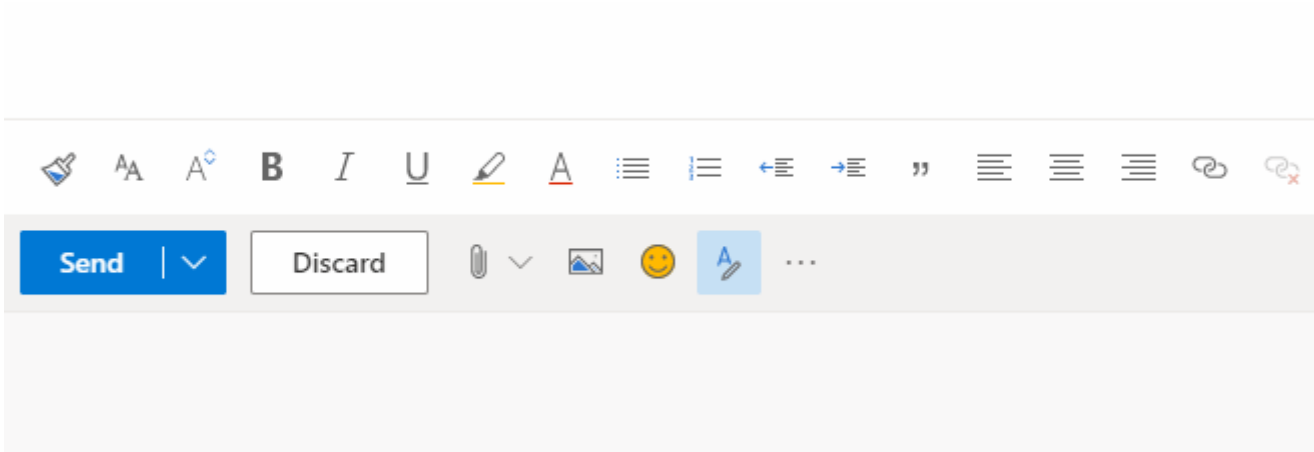
CLIENT NO	MATTER	DETAILS
D00001	177787	Clinical negligence private
W00077	1	Matter 1
M00179	1	Matter test

Left click the desired matter

Add a 'Detail' to be displayed in the Osprey Matter History. You can also set a custom type, a folder, and a retention period. To export the email only, tick the option. Ticking Time posting will display the time recording options. click Export.

Retrieving Osprey Information in New Messages

Compose a new Message



Select the ellipsis and then Osprey Approach Add-in

Using the Add-in search for the desired matter

You can select an email template to import it into your new email.

Email template

Client/Matter Contacts

EMAIL	C
jimmy@marcel.dev.cbiz.ro	H
nikolatesla@marcel.apislex.net	N
Tomas@marcel.apislex.net	R

Select a recipient from the list of available contacts and choose To or Cc

Scrolling further you can also attach any document or package available in Osprey, simply left click the item you wish to add

Attachments

Convert Word to PDF

REF NUMBER	DETAILS	TYPE	CREATED I
43440	_Police Statement	docx	07/10/201 13:54:08
43475	_Blank Letter to Client	jpg	07/10/201 14:57:15