

Osprey Approach: Using the Outlook Mobile Osprey Approach Add-in

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

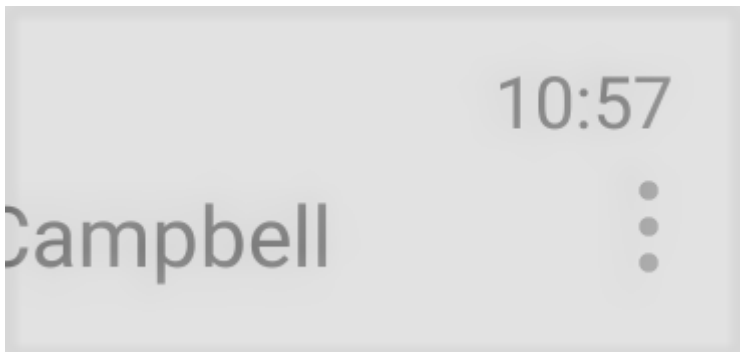
The latest version is always online at
<https://support.ospreyapproach.com/?p=21870>



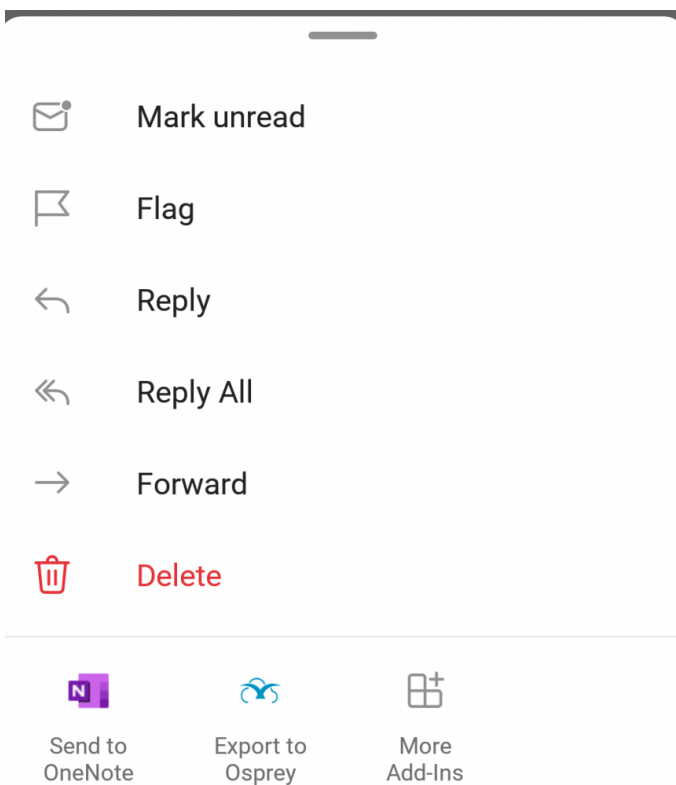
The Osprey Approach Add-in allows you to export emails to Osprey Matter History.

Exporting Email

Tap a message to export



Within the message, tap the vertical ellipsis



Tap Export to Osprey

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

Sign in to your account

Osprey URL

Osprey URL

Username

Username

Password

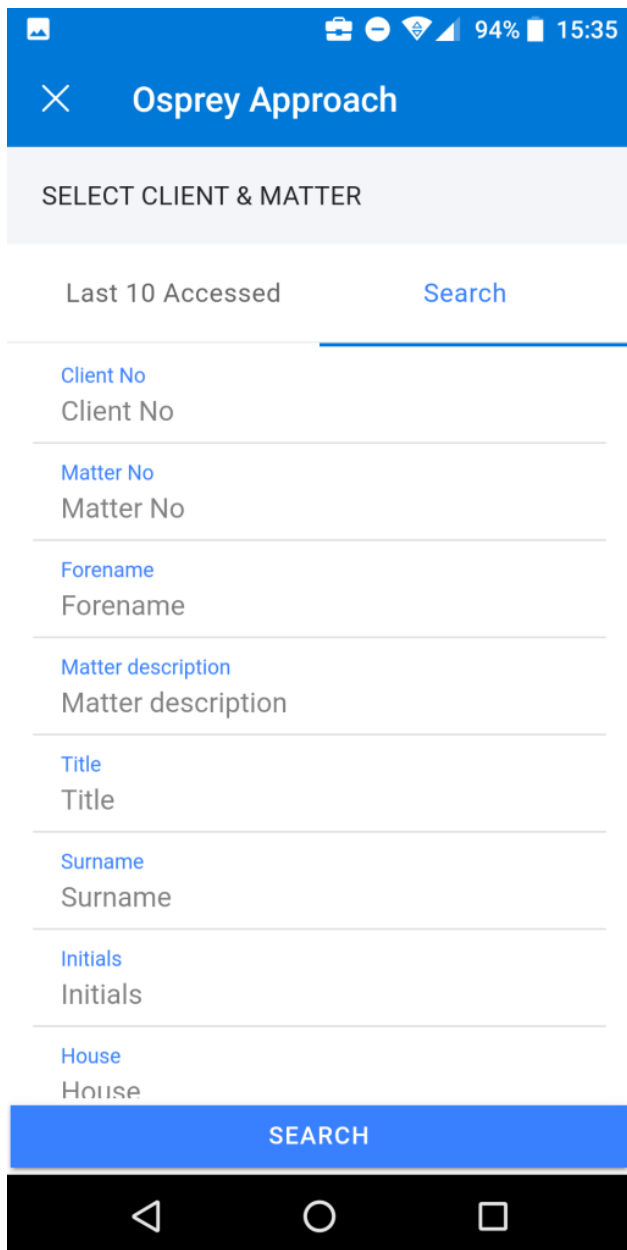
Password

Don't show this screen again



SELECT CLIENT & MATTER

Tap Select Client & Matter

A screenshot of a mobile application interface. At the top, there is a blue header with a white 'X' icon and the text 'Osprey Approach'. Below the header is a grey bar with the text 'SELECT CLIENT & MATTER'. Underneath is a white bar with two tabs: 'Last 10 Accessed' and 'Search'. The 'Search' tab is selected, indicated by a blue underline. Below the tabs is a list of search filters, each with a blue label and a grey text input field: 'Client No', 'Matter No', 'Forename', 'Matter description', 'Title', 'Surname', 'Initials', and 'House'. At the bottom of the screen is a blue bar with the text 'SEARCH' in white. The very bottom of the image shows the Android navigation bar with three icons: a back arrow, a circle, and a square.

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Osprey Approach

SELECT CLIENT & MATTER

Last 10 Accessed

Search

Client No

Client No

Matter No

Matter No

Forename

Forename

Matter description

Matter description

Title

Title

Surname

Surname

Initials

Initials

House

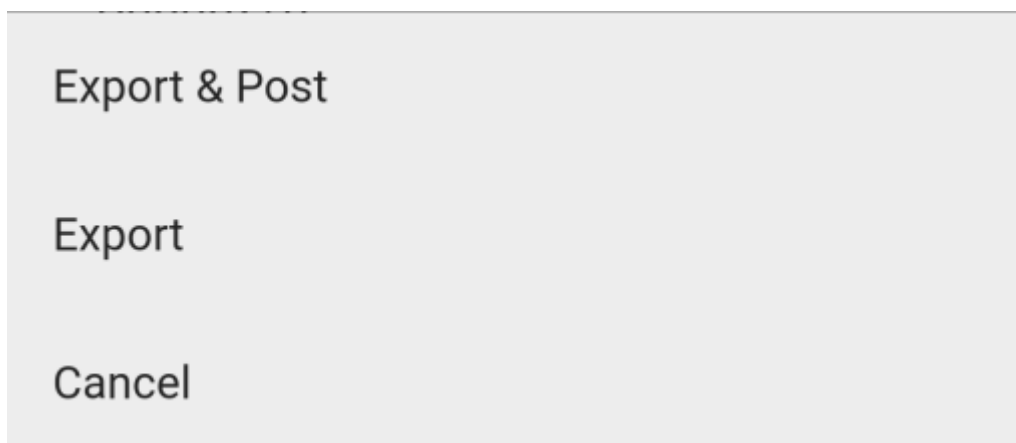
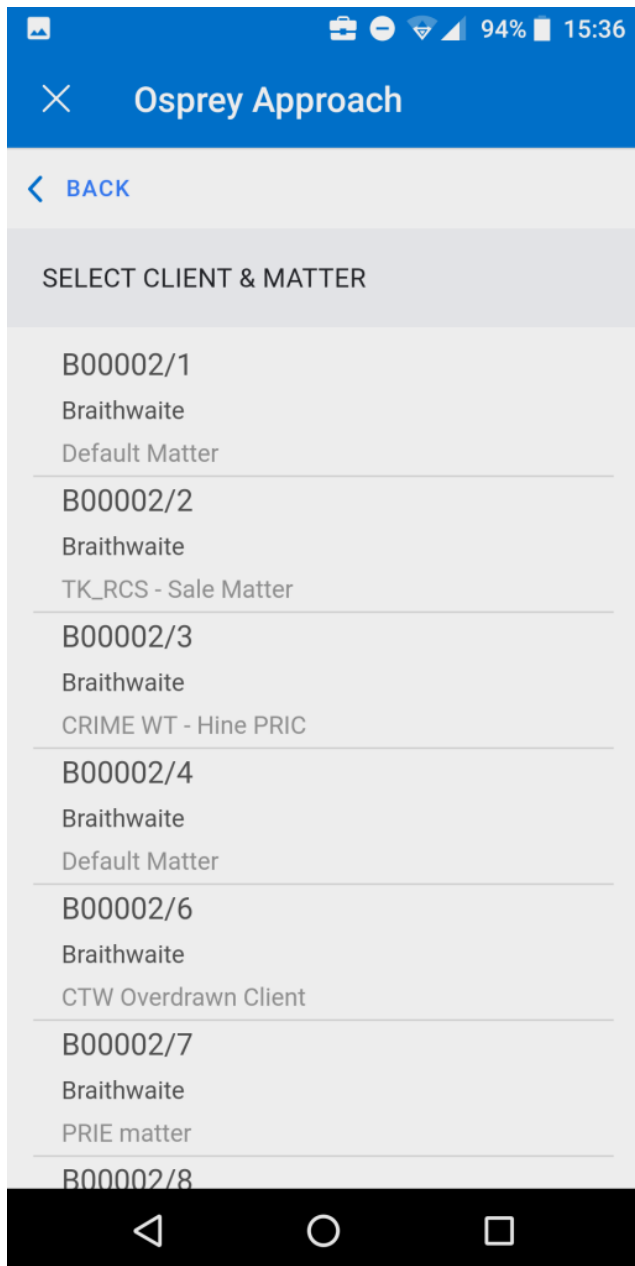
House

SEARCH

At the top tap either Last 10 Accessed or Search

If you tap Search enter details and tap Search at the bottom.

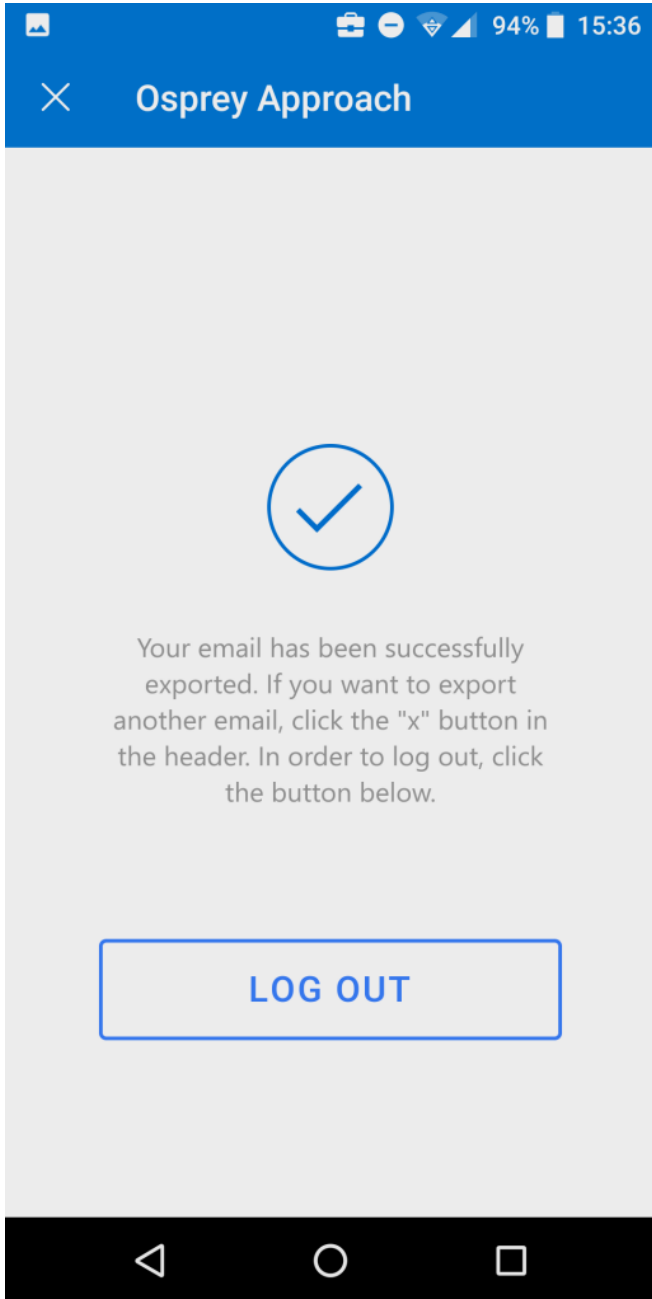
If you tap Last 10 Accessed, or have searched for matters, tap a matter to load it.



Export – Will export the email into Osprey and will also include any attachments as a separate item in the Matter History.

Export & Post – Exports the email and attachment as with the 'Export' option. The Time Posting window will then open for you to complete.

The Email Export Status window will confirm that the email has been successfully exported.



Either tap the X or Logout