

# Osprey Approach: Install and use the Osprey Word add-in for Office 365

This help guide was last updated on  
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The latest version is always online at  
<https://support.ospreyapproach.com/?p=16545>

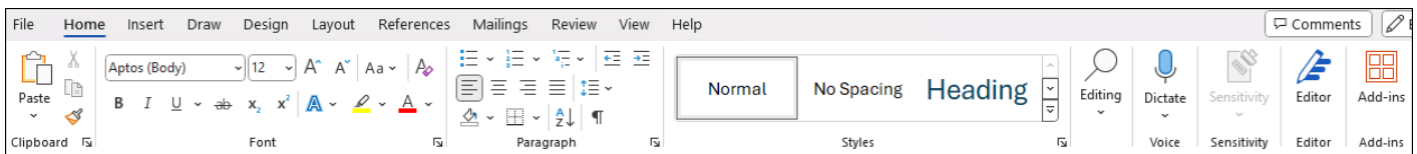


# This guide will go through installing the 365 Osprey Word Add-in

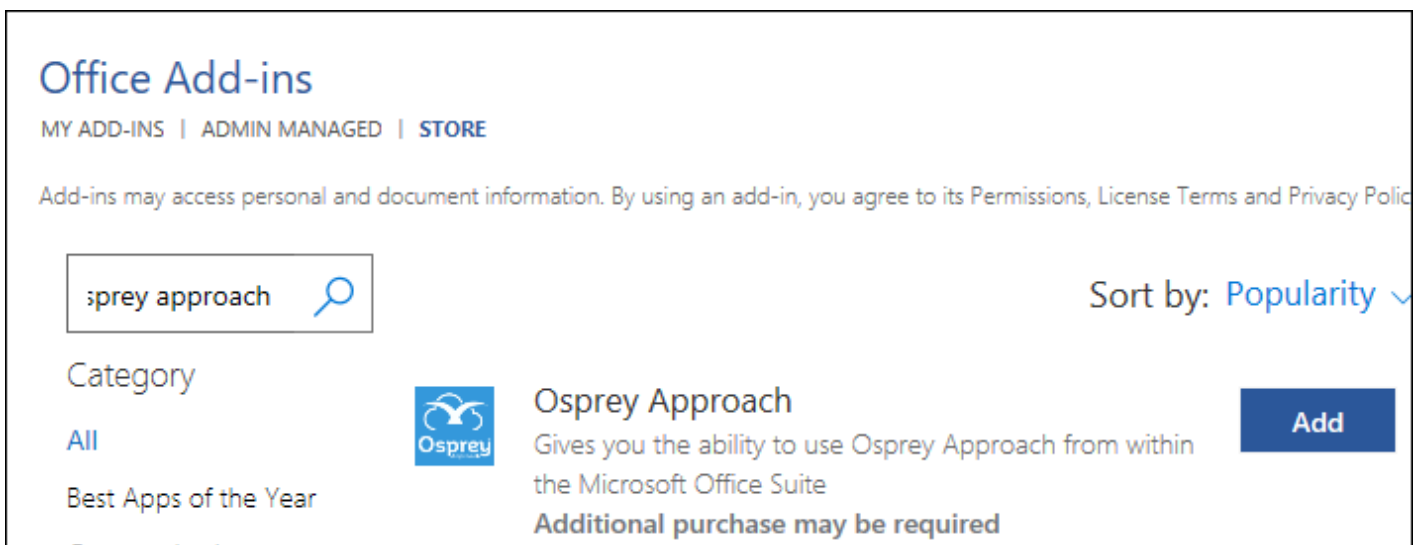
The Osprey Approach Word add-in will allow you to perform all of your document-related tasks directly from Microsoft Word.

## Install the Add-in

Open Microsoft Word, navigate to the Home tab and then locate the **Get Add-ins** button.



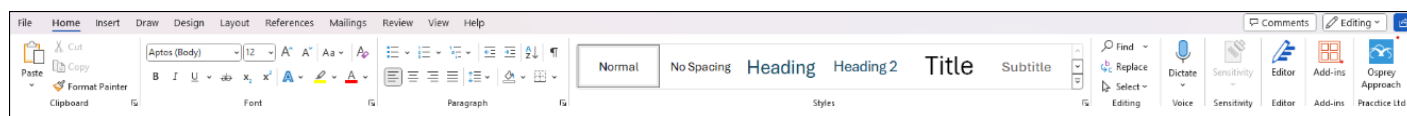
Select 'More Add-ins' at the bottom of the pop-up box and search for Osprey. Select **Add** to install your add-in.



Once installed locally, the add-in will operate on your installed copy of Microsoft Word, as well as appear when using Word online.

## Logging In

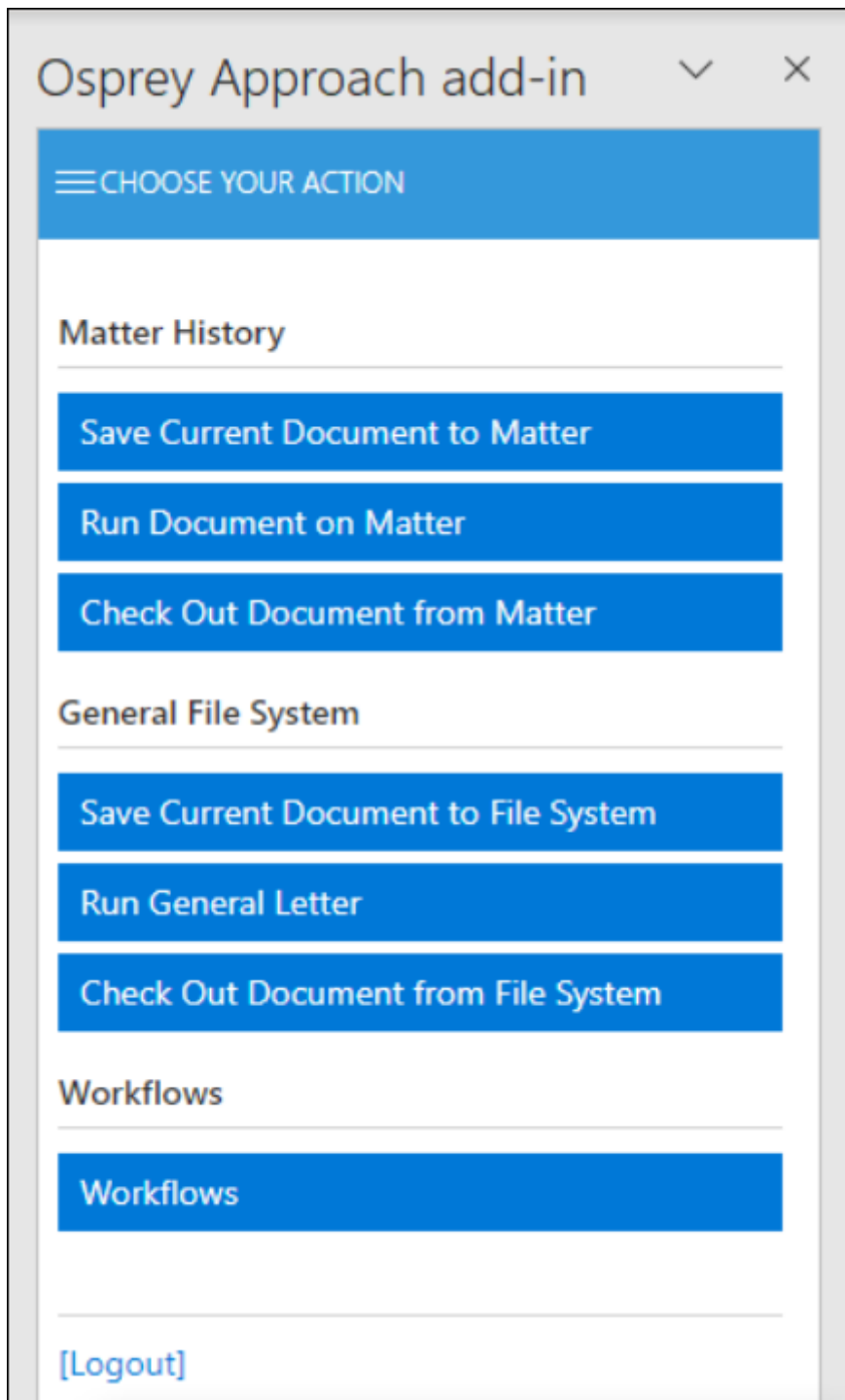
Once installed, navigate back to the Home tab and select Osprey Approach.



Navigate to the Osprey Approach button located on the Home tab. The Osprey Approach add-in will open. Enter your details and sign in.

A screenshot of the 'Osprey Approach add-in' window. The window has a title bar with a dropdown arrow and a close button. Inside, there is the Osprey Approach logo at the top. Below the logo are three input fields: 'Site URL' (containing 'https://sales.ospreyapproach.com/main'), 'Username', and 'Password'. A blue 'Sign In' button is positioned below the password field. At the bottom of the window, there is a paragraph of text: 'Upload new documents, produce documents from your template library, check out and check in documents from your matter history and time recording.'

Once logged in, you will be able to select an action.



## Saving Current Document

To save the document currently being worked on, select "Save Current Document to Matter".

Osprey Approach add-in

SAVE CURRENT DOCUMENT TO MATTER

Select Client/Matter

Save

Client/Matter search

Client no

Matter no

Matter description

Surname

Show advanced search

Search

Results

Use the boxes provided to search for a client and matter.

Once you have selected search the results will appear below, click to select the matter.

Osprey Approach add-in

≡ SAVE CURRENT DOCUMENT TO MATTER

<

Select Client/Matter

Save

Document Details

Client/Matter

COW00002/3

Folder

...

Custom type

Please select...

▼

Description

Retention period

Please select...

▼

Time recording

☒

Automatic Time Record (Untick to enter time recording manually)

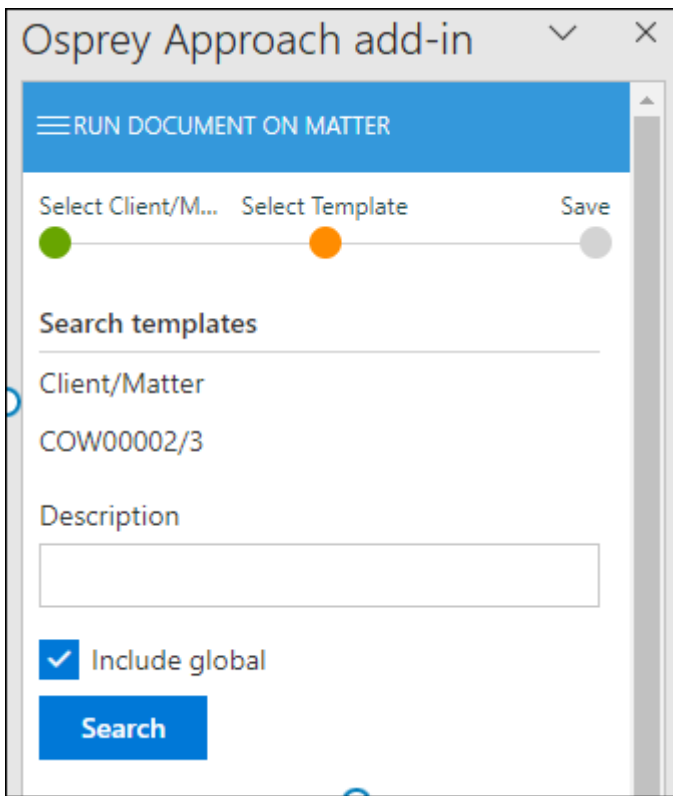
Save

Save with no time record

Enter the details for the document and save with or without time recording. Once saved the document will be available in the Osprey matter history.

## Run Document on Matter

Choosing Run Document on Matter will run a document from Osprey Approach. You will need to select a client in the same manner by using the client matter search.



Osprey Approach add-in

≡ RUN DOCUMENT ON MATTER

Select Client/M... Select Template Save

Search templates

Client/Matter

COW00002/3

Description

☒ Include global

Search

Untick the 'Include Global' box to remove any global documents from the list, or use the description box to search for the standard document you wish to run.

Select the document you wish to run from the list. The document will now open to allow you to amend it. You can save the document with or without time recording as shown previously.

## Check Out Document From Matter

If you wish to edit a document that is already saved in the Osprey matter history select 'Check Out Document from Matter'

Select the client and the matter where the document is saved. Once a client and matter is selected you will see a list of available documents to check out. You can also search by description and date to find the document you need.

Osprey Approach add-in

≡CHECK OUT DOCUMENT FROM MATTER

Select Client/Matt...

Check Out

Check In

Filters

Details

Date

All Documents

15 December, 2022

☐ Search by content

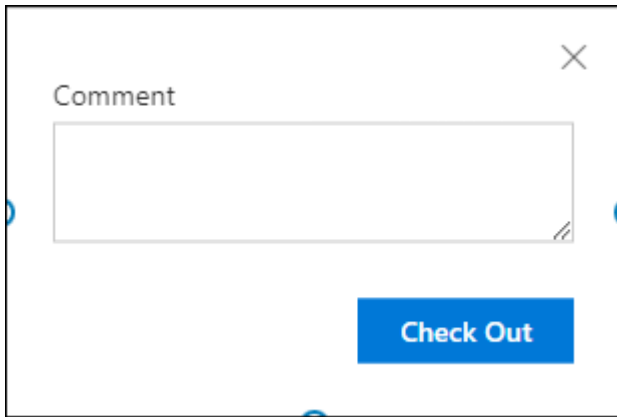
Search

Results

CHECKED OUT	DETAILS	CREATED DATE/TIME
	Client care letter.docx.docx	09/08/2022 10:19:46

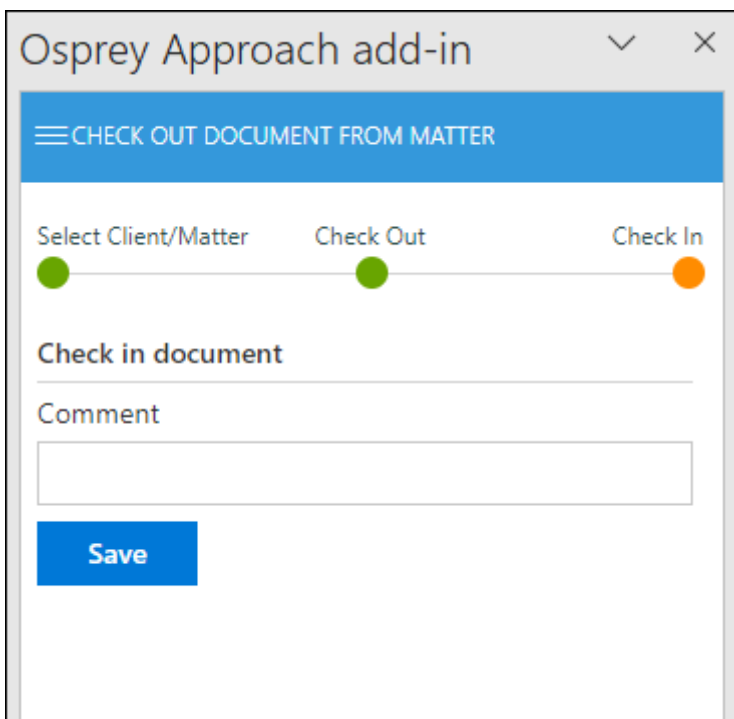
Now select the document you wish to check out. You will be prompted to enter a comment, this is not compulsory at this stage. Click Check Out to open the document.





A small dialog box titled 'Comment' with a close button (X) in the top right corner. It contains a text input field and a blue button labeled 'Check Out' at the bottom right.

Once you have finished making amendments to the document, enter a comment then click 'Save' to check your document back in.



The 'Osprey Approach add-in' window features a title bar with a dropdown arrow and a close button. Below the title bar is a blue header with a hamburger menu icon and the text 'CHECK OUT DOCUMENT FROM MATTER'. The main area contains a progress bar with three stages: 'Select Client/Matter' (green dot), 'Check Out' (green dot), and 'Check In' (orange dot). Below the progress bar, there is a section titled 'Check in document' followed by a 'Comment' label and a text input field. A blue 'Save' button is positioned at the bottom left of the main content area.

The same actions are available for the General File System.

## Workflows

You may also run workflows from the add-in, to do so choose Workflows

Once a client and matter is selected, you can load a new workflow and run tasks on any previously loaded workflows.

Osprey Approach add-in

WORKFLOWS

Select Client/MatterRun workflow

Client/Matter

COW00002/5

Load Workflow

Advanced

Remove All

Colapse/Expand All

☐ Client Level Workflows

Workflow Tasks

File Opening (Residential Conveyancing Purchase FW\_RCP)  
▼ ▶

Send Welcome Text Message (Residential Conveyancing Purchase FW\_RCP)  
▼ ▶

Client Care Pack (Residential Conveyancing Purchase FW\_RCP)  
▼ ▶

**Load Workflow** allows you to load a workflow to the selected matter.

**Advanced** allows you load a workflow at a specific position. Remove All provides you the option to remove workflows from the matter.

Clicking the chevron will expand the actions which may be unticked if you don't want to run them.

Client Care Pack (Residential Conveyancing Purchase FW\_RCP)  
▼ ▶

Receipt of Estate Agent's Memorandum of Sale (Residential Conveyancing Purchase FW\_RCP)  
^ ▶

✓ Meet Unmet Keydates by Type: CHASECLI

✓ Allocate a Custom Questionnaire: Seller's Details

✓ Send merged email template

✓ Send Standard Document: Sol initial letter FW\_RCP

✓ Send Standard Document: Blank client letter FW\_RCP

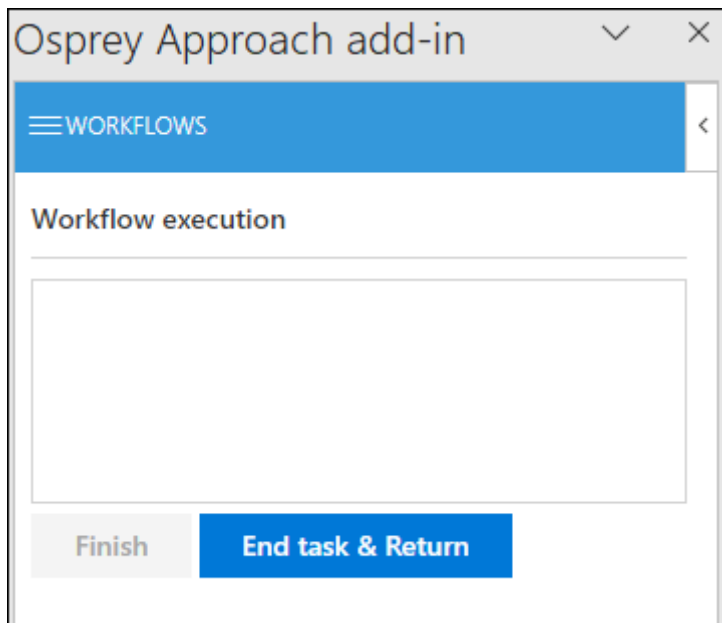
✓ Send Standard Document: Blank client letter FW\_RCP

✓ Send Standard Document: Blank client letter FW\_RCP

Received Contract (Residential Conveyancing Purchase FW\_RCP)  
▼ ▶

Click the run button to process the task. Documents will load and may be saved just the same as Run Standard Document.

When there are no more actions to run for this task, you will be notified that the task has been completed. Select End task & Return to return to the workflow



Tasks that have been completed will be displayed in green.

