Osprey Approach: Show Key Dates in Outlook
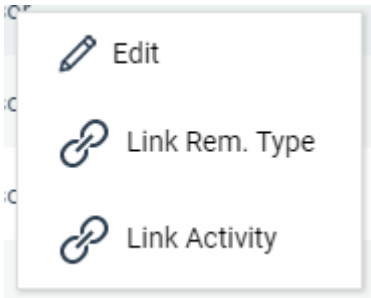
Click here for a printer-friendly version

Osprey allows you to display any key dates present on your files in Outlook, so you can see at a glance if you have any appointments coming up relevant to your cases.

Please Note: This feature will only work if your email domain is on our Hosted Exchange or the Office 365 cloud. Clients with their emails hosted in other locations will not be able to use this service.

Add the Office 365 credentials

Firstly, you must ensure that the relevant fee earner has their email credentials saved against their Osprey fee earner code.

Navigate to Supervisor > Code Setup > Fee Earners.

Now right click on the relevant fee earner

Select Edit

Enter their email address and password for the email account.

Now click the Save button. This fee earner will now be able to save a key date and add it to the Fee earners calendar.

Create a Key Date in browser

KEY PERFORMANCE INDICATOR REPORTS ∨

✓ Set default | ⟳ Refresh chart | 🖨 Print

Available KPIs:	Completed Matters ∨
Fee Earner:	Constantin Onu Fee Earner (Des ∨ ▤ Multi Select
Chart Type:	⦿ Line ○ Bar
Show Labels:	☑
Target:	0

Completed Matters

February

Month

Selected Fee Earner(s): Constantin Onu Fee Earner (Description field)

MATTERS FOR REVIEW ∨

⟲

Navigate to Case Management > Key Dates > Add Key Date.

Now fill in the details, ensuring that you tick the Add Diary Appointment tick box. You can also select a specific time if you wish, or just set the appointment as an all day appointment.

Click Save to add this key date to your Outlook calendar.

Create a Key Date in the Case Management App

Today's Units:	0
Today's Time:	00h:00m
Today's Value:	£0.00

Global se

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🌐 Osprey Browser App

🏠 Home

👥 Client/Matter ⊞

💼 Case Management

👛 Client Ledgers

💲 Banks & Journals ⊞

📇 Contacts

🏢 Organisations

📚 Case Bundle

📦 Packages

🕐 Time Recording ⊞

📊 Reports ⊞

❓ Help

⏻ Sign Out

Completed File Opening

Home - B00002/1 (Braithwaite Ne

MATTERS FOR REVIEW

CLIENT	MATTER	CLIENT NA
B00002	10	Braithwa
B00002	11	Braithwa
B00002	8	Braithwa
B00002	12	Braithwa
WOO00006	1	Wood Ri

YOUR KEY DATES

CLIENT	MATTER	CLIENT NAM
B00002	1	Braithwaite

Navigate to Case Management > Add Key Date

Now fill in the details, ensuring that you tick the Add Diary Appointment tick box. You can also select a specific time if you wish, or just set the appointment as an all day appointment.

Add New Key Date

← [Save]

Fee Earner

Craig Matthews

Additional Fee Earners

☐ Dave Dingle

☐ David Brown

☐ Dragos Raduc

☐ Ethan Green

☐ Martyn Wells

Date Met

☐

Create Diary Appointment?

☑ All Day   ☑ At   [09:00 ⌄]

Published?

☐

Click Save to add this key date to your Outlook calendar.