



Osprey Approach: Adding and Managing Key Dates

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The latest version is always online at
<https://support.ospreyapproach.com/?p=52697>

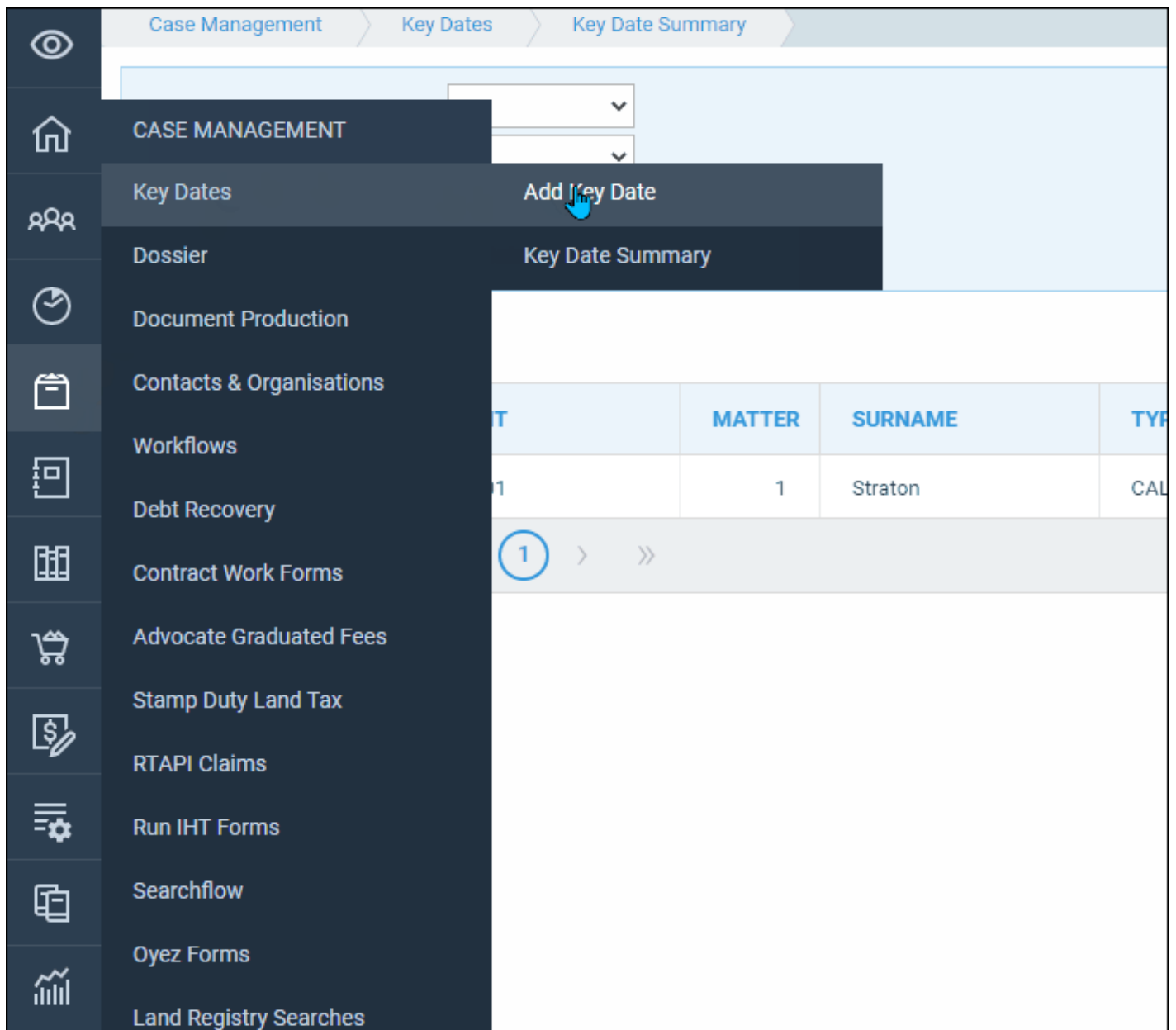
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Osprey allows users to add Key Dates to their matters as a reminder to do something on the matter. This guide will take you through your options

Adding a key date



Key dates can be added from the Case management area of Osprey. Navigate to Case Management - Key Dates - Add Key Date




The screenshot shows the Osprey Case Management interface. The breadcrumb trail at the top reads 'Case Management > Key Dates > Key Date Summary'. A dark sidebar on the left contains a list of menu items: CASE MANAGEMENT, Key Dates, Dossier, Document Production, Contacts & Organisations, Workflows, Debt Recovery, Contract Work Forms, Advocate Graduated Fees, Stamp Duty Land Tax, RTAPI Claims, Run IHT Forms, Searchflow, Oyez Forms, and Land Registry Searches. The 'Key Dates' menu item is highlighted, and a sub-menu is open, showing 'Add Key Date' (with a blue cursor pointing to it), 'Key Date Summary', and 'Dossier'. The main content area shows a table with columns 'MATTER' and 'SURNAME'. A table row is visible with '1' in the 'MATTER' column and 'Straton' in the 'SURNAME' column. Below the table, there is a pagination control showing '1' in a circle, followed by navigation arrows.

MATTER	SURNAME	TYPE
1	Straton	CAL

In the page that opens up you can now enter the details for the Key Date, Once the boxes have been completed click SAVE to create the key date.

 Save Cancel

Client No	<input type="text" value="STR001"/>
Matter No	<input type="text" value="1"/>
Key Date	<input type="text" value="21/12/2022"/> 
Key Date Type	<input type="text" value="01CHACLI"/> ▼
Notes	<input type="text" value="Chase client for a response"/>
Fee Earner	<input type="text" value="JAE"/> ▼ <input checked="" type="checkbox"/> Multi Select
Date Met ?	<input type="checkbox"/>
Create Diary Appointment ?	<input type="checkbox"/> All Day <input type="checkbox"/> At
Published ?	<input type="checkbox"/>

Client and Matter number - shows the currently loaded client and matter. You cannot change that on this page so ensure you have the correct client and matter loaded before creating the Key Date

Key Date - Type or select a date from the calendar for the Key Date

Key Date Type - Select the Key Date type from the dropdown menu. These are set up by your supervisor.

Notes - Displays the detail for the Key Date type previously selected

Fee Earner - Select the primary fee earner associated with this key date using the drop down list. If more than one Fee Earner needs to be aware of this key date you can use the Multi Select button to choose additional Fee Earners

Save Cancel

Client No STR001

Matter No 1

Key Date 21/12/2022

Key Date Type 01CHACLI

Notes Chase client for a response

Fee EARNER JAE Multi Select

Date Met ?

Create Diary Appointment ? All Day At

Published ?

CHOOSE FEE EARNERS

OK | Cancel | Select All/None

- ADAMB
- ADRIAN
- AEH
- AG
- ALEXS
- AR
- BK
- CFC
- CJM

Date Met - Once your Key Date has been met, place a tick in this box.

Create Diary Appointment? - For office 365 users you can place a tick in one of these boxes to create an outlook diary appointment/reminder for the Key Date

Published? - For users who have our Client portal set up, placing a tick here will allow their clients to see the key date in the portal.

Viewing your key dates & your key date summary

You can view a list of your key dates in three places in osprey.

1. From the Home screen
2. From the Case Management Key Dates Screen

3. From the Key Date Summary screen

The home screen

Navigate to the Home Screen, on this screen you will see two lists for key dates, Your Key Dates and Key Dates Added by you. Your key dates shows a list of key dates with which you are associated as the fee earner, and Key dates added by you shows a list of key dates that you have created but are not directly associated with.

The screenshot displays two tables of key dates. The first table, 'YOUR KEY DATES', has columns: F/E, CLIENT, MATTER, CLIENT NAME, KEY DATE, TYPE, SUP F/E?, ASSIGN F/E, and MATTER DESCRIPTION. It contains two rows: one with a red background (KEY DATE: 30/09/2022, TYPE: CALLBK) and one with an orange background (KEY DATE: 21/12/2022, TYPE: 01CHACLJ). The second table, 'KEY DATES ADDED BY YOU', has columns: F/E, CLIENT, MATTER, KEY DATE, TYPE, and CLIENT NAME. It contains one row with a green background (KEY DATE: 27/12/2022, TYPE: 7DAYREM, CLIENT NAME: Evans Colin). Both tables include pagination controls and a filter dropdown.

F/E	CLIENT	MATTER	CLIENT NAME	KEY DATE ↑	TYPE	SUP F/E?	ASSIGN F/E	MATTER DESCRIPTION
JAE	STRD01	1	Straton Demo D	30/09/2022	CALLBK	●	Jane A Evans	Default Matter
JAE	STRD01	1	Straton Demo D	21/12/2022	01CHACLJ	●	Jane A Evans	Default Matter

F/E	CLIENT	MATTER	KEY DATE ↑	TYPE	CLIENT NAME
HC	EVA00301	1	27/12/2022	7DAYREM	Evans Colin

Red key dates are overdue for attention

Key dates in Orange are due for attention today

Key dates in Green are due for attention in the future.

Both of these lists are interactive and you can navigate directly to the key date on the matter by left clicking on the line of the key date and choosing select.


Case Management > Key Dates > STR001/1 (Straton D Demo) FE:JAE WT:JAECON Default Matter


WORKFLOW STATUS BAR


help
Key Dates: Date: 21/12/2022 Description: Chase client for a response [More Key Dates](#) ▾


CLIENT & MATTER SEARCH ▾

[Client Search](#) | [Dossier Search](#) | [CRM Search](#) | [Send e-mail](#) | [Client Dossier](#) | [SMS](#)


Client No:  [Load Client/Matter](#)



Matter No: 


Name: 

Matter: 

KEY DATES ▾

[Add](#) [Export](#)  Filter by Keydate Type: ▾

KEY DATE	KEY DATE ID	NOTES	DATE MET
30/08/2022	CALLBK		
21/12/2022	01CHACLI	Chase client for a response	


Page 1 of 1 (2 items) 


Case Management


Navigate to Case management - Keydates. This will open the page showing all of the key dates on the currently loaded matter


CLIENT & MATTER SEARCH ▾

[Client Search](#) | [Dossier Search](#) | [CRM Search](#) | [Send e-mail](#) | [Client Dossier](#) | [SMS](#)



Client No:  [Load Client/Matter](#)





Matter No: 


Name: 

Matter: 

KEY DATES ▾

[Add](#) [Export](#)  Filter by Keydate Type: ▾ 

KEY DATE	KEY DATE ID	NOTES	DATE MET	F/E	TASK DESCRIPTION	USER	EDIT	RUN LINKED T/
30/08/2022	CALLBK			JAE		Jane		
21/12/2022	01CHACLI	Chase client for a response		JAE		Jane		

Page 1 of 1 (2 items)  Page size: 10 ▾

Key date summary

Navigate to Case management - Key dates - Key Date Summary

In this screen you can choose which key dates you want to view, this screen is not interactive as with the home screen, but the results can be printed to enable further review.

The screenshot displays the 'Key Date Summary' interface. It features a filter section at the top with the following options:

- Filter By Fee Earner: JAE
- Filter By Key Dates: All
- Filter By Keydate Type: ALL
- Filter By Dates

Below the filters is a table with the following data:

DATE	CLIENT	MATTER	SURNAME	TYPE	NOTES	F/E	DATE MET	EXEC?
30/08/2022	STR001	1	Straton	CALLBK		JAE	•	•
21/12/2022	STR001	1	Straton	01CHACLI	Chase client for a response	JAE	•	•

At the bottom of the table, there is a pagination indicator showing 'Page 1 of 1 (2 items)' and a 'Page size: 10' dropdown. Below the table are 'Print' and 'Refresh' buttons.

1. Filter By Fee Earner - Using the dropdown arrow choose the fee earner for whom you want to view their Key Dates
2. Filter by Key Dates - Use the dropdown arrow to filter by Met or Unmet Key dates for the selected fee earner.
3. Filter by Key Date Type - Use the dropdown arrow to filter by a key date type.
4. Filter by Dates - Enables boxes to select a date range for key dates associated with the selected fee earner. You can either type the date into the box or use the calendar to select a date

Osprey Approach Test

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

Global search

Case Management > Key Dates > Key Date Summary

Filter By Fee Earning: JAE
Filter By Key Dates: All
Filter By Keydate Type: ALL
 Filter By Dates: 28/12/2022 To [] Apply Date Filter

Print Refresh

DATE	CLIENT	TYPE
30/08/2022	STR001	CAL
21/12/2022	STR001	01C

Page 1 of 1 (2 items)

Managing your key dates

From the key date list in the case management area you can amend the details of the key date or mark the key date as being met.

Navigate to Case management -- Key dates

To edit the details, click on the pencil icon on the row you want to edit under the EDIT column

KEY DATES

Add Export Filter by Keydate Type: All

KEY DATE	KEY DATE ID	NOTES	DATE MET	F/E	TASK DESCRIPTION	USER	EDIT	RUN LINKED TO
30/08/2022	CALLBK		●	JAE		Jane		
21/12/2022	01CHACLI	Chase client for a response	●	JAE		Jane		

Page 1 of 1 (2 items)

Legend: ■ Previous Date ■ Current Date ■ Future Date

This will open the same details screen used when creating the key date. You can now edit any of those details except the client and matter numbers.

From the lists in the home screen you can change the Fee Earner associated with the key date. Navigate to the Home Screen. On the row of the key date you want to re-assign use the drop down list in the box under the Assign F/E column to select a new Fee Earner.

You will see a message asking if you want to proceed, click ok on this to confirm the change. This Key Date will now no longer appear in the Your Key Dates List.

KEY DATE ↑	TYPE	SUP F/E?	ASSIGN F/E	M
21/12/2022	01CHACLI	●	Jane A Evans ▼	

Mark key date as met

Once you have completed any actions, you will want to mark that key date as being Met. This will stop any reminders and remove the key date from the lists on the Home page. The met key dates will still be visible on the key date page in the case management section.

Navigate to Case management - Key Dates, or select the key date from the home page as previously described. All keydates that are not met will have a small red dot in the DATE MET column. Click onto the pencil icon in the EDIT column, place a tick into the Date Met box and click save. The key date will now be marked as met. It will have a small green dot in the DATE MET column

The screenshot shows the 'Edit Key Date' form in the Osprey Case Management system. The form includes the following fields and controls:

- Client No:** STR001
- Matter No:** 1
- Key Date:** 30/08/2022
- Key Date Type:** CALLBK
- Notes:** (empty text area)
- Fee Earner:** MG
- Date Met ?** (with a pencil icon next to it)
- Creates Diary Appointment ?** All Day AM
- Published ?**

At the top of the form, there are buttons for 'Save', 'Cancel', and 'Delete'. The top navigation bar shows 'Osprey Approach Test', 'Today's Date: 30/08/2022', 'Today's Value: £0.00', and a 'Global search' field. The bottom right corner of the form has a '+' icon.