

# Osprey Approach: Adding and managing key dates

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Apr 22nd, 2024

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

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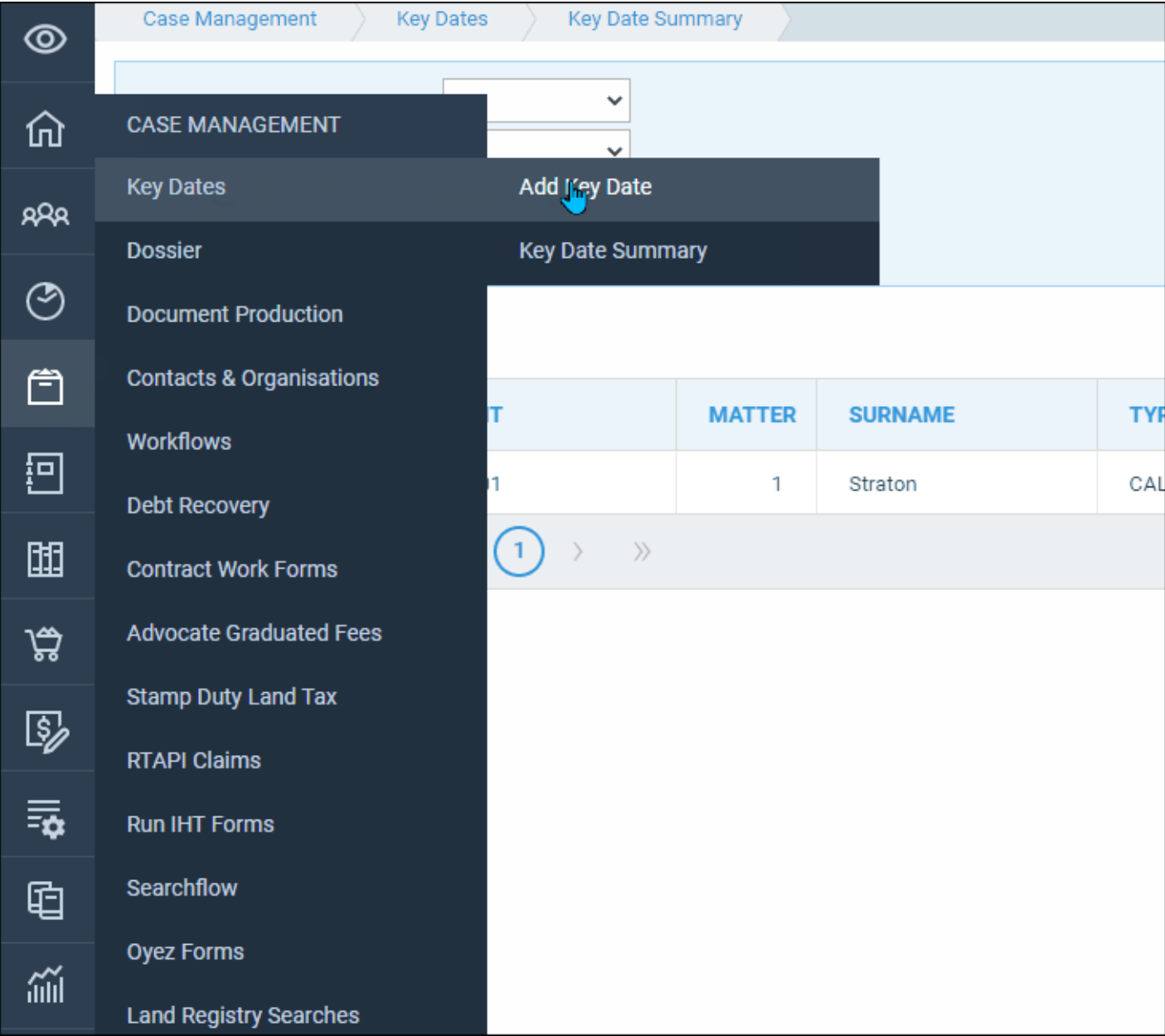


Osprey allows users to add Key Dates to their matters as a reminder to do something on the matter


## Adding viewing and managing key dates


### 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



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. Key date types 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

The screenshot shows the Osprey software interface for creating a key date. At the top, there are 'Save' and 'Cancel' buttons. The form contains the following fields:

- Client No:** STR001
- Matter No:** 1
- Key Date:** 21/12/2022 (with a calendar icon)
- Key Date Type:** 01CHACLI (dropdown menu)
- Notes:** Chase client for a response
- Fee Earner:** JAE (dropdown menu) with a 'Multi Select' button.
- Date Met ?** ☐
- Create Diary Appointment ?** ☐ All Day ☐ At
- Published ?** ☐

The 'Multi Select' modal is open, titled 'CHOOSE FEE EARNERS'. It includes 'OK', 'Cancel', and 'Select All/None' buttons. A list of fee earners is shown with checkboxes:

- ☐ 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.

YOUR KEY DATES									
F/E	CLIENT	MATTER	CLIENT NAME	KEY DATE ↑	TYPE	SUP F/E?	ASSIGN F/E	MATTER DESCRIPTION	
JAE	STR001	1	Straton Demo D	30/08/2022	CALLBK	•	Jane A Evans	Default Matter	
JAE	STR001	1	Straton Demo D	21/12/2022	OTCHACLI	•	Jane A Evans	Default Matter	
Page 1 of 1 (2 items) < 1 > Page size: 10									
KEY DATES ADDED BY YOU									
Filter by Keydate Type: All									
F/E	CLIENT	MATTER	KEY DATE ↑	TYPE	CLIENT NAME				
RC	EVA00361	1	27/12/2022	7DAYREM	Evans Colin				

Key dates in Red 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: STR001

Matter No: 1

Name: Straton

Matter: Default Matter

Load Client/Matter

KEY DATES

Add

Export

Filter by Keydate Type: All

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

Page 1 of 1 (2 items)

<<

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1

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## 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:

Matter No:

Name:

Matter:

KEY DATES ▾

Filter by Keydate Type:

KEY DATE	KEY DATE ID	NOTES	DATE MET	F/E	TASK DESCRIPTION	USER	EDIT	RUN LINKED TO
30/06/2022	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.

Case Management > Key Dates > Key Date Summary

Filter By Fee Earner:  ▾

Filter By Key Dates:  ▾

Filter By Keydate Type:  ▾

☐ Filter By Dates

DATE	CLIENT	MATTER	SURNAME	TYPE	NOTES	F/E	DATE MET	EXEC?
30/06/2022	STR001	1	Straton	CALLBK		JAE		
21/12/2022	STR001	1	Straton	01CHACLI	Chase client for a response	JAE		

Page 1 of 1 (2 items) Page size: 10 ▾

Filter By Fee Earner:  ▾

Filter By Key Dates:  ▾

Filter By Keydate Type:  ▾

☐ Filter By Dates

Filter By Fee Earner - Using the dropdown arrow choose the fee earner for whom you want to view their Key Dates

Filter by Key Dates - Use the dropdown arrow to filter by Met or Unmet Key dates for the selected fee earner.

Filter by Key Date Type - Use the dropdown arrow to filter by a key date type.

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

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Case Management
Key Dates
Key Date Summary

Filter By Fee Earner  
JAE ▼

Filter By Key Dates  
All ▼

Filter By Keydate Type  
ALL ▼

☒ Filter By Dates

28/12/2022 📅 To  📅 Apply Date Filter

Print

DATE ↑	CLIENT	
30/08/2022	STR001	
21/12/2022	STR001	

< **December, 2022** >

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today: December 21, 2022

Page 1 of 1 (2 items)    << < 1 > >>

## 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 for the key date 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	CALLEK		●	JAE		Jane		
21/12/2022	01CHACLI	Chase client for a response	●	JAE		Jane		
Page 1 of 1 (2 items) 1 Page size: 10								
Legend								
Previous Date Current Date Future Date								

this will open the same details screen used when creating the key date and 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 associated with a key date 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 and will have a small green dot in the DATE MET column

Client No

Matter No

Key Date  

Key Date Type

Notes

Fee Earning

Date Met ? ☐

Create Diary ☐ All Day ☐ At

Appointment ? ☐

Published ? ☐

