



Osprey Approach: Adding and managing key dates

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

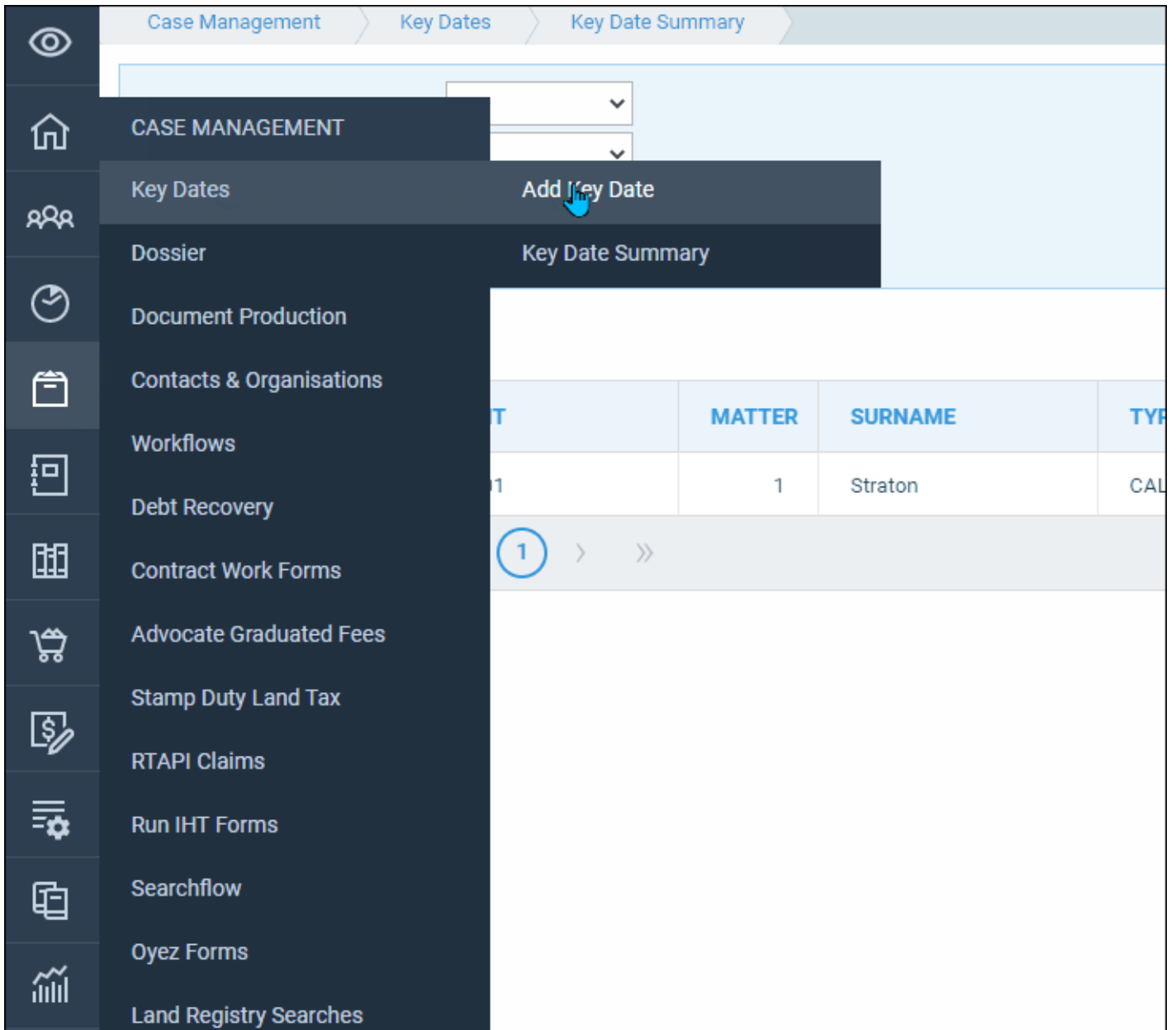


Osprey allows users to add Key Dates to their matters as a reminder to do something on the matter

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



The screenshot shows the Osprey Case Management interface. The breadcrumb navigation at the top reads 'Case Management > Key Dates > Key Date Summary'. A dark overlay menu is open, showing the following options: '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' option is highlighted, and a sub-menu is visible with 'Add Key Date' and 'Key Date Summary' options. A blue cursor is pointing to the 'Add Key Date' button. In the background, a table is partially visible with columns 'MATTER' and 'SURNAME', and a row containing '1' and 'Straton'. Below the table, a pagination bar shows '1' in a circle, followed by navigation arrows.

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.

The screenshot shows a software interface for creating a Key Date. At the top, there are 'Save' and 'Cancel' buttons. Below are several 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 checked **Multi Select** button.
- Date Met ?**
- Create Diary Appointment ?** All Day At
- Published ?**

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

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.

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	

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KEY DATES ADDED BY YOU						
F/E	CLIENT	MATTER	KEY DATE ↑	TYPE	CLIENT NAME	
RC	EVA00001	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: 
 Matter No:  **Load Client/Matter** 

Name: 
 Matter: 

KEY DATES ▾

 Add  Export  Filter by Keydate Type: ▾

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

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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 T/
30/08/2022	CALLBK		●	JAE		Jane	<input type="button" value="✎"/>	
21/12/2022	01CHACLI	Chase client for a response	●	JAE		Jane	<input type="button" value="✎"/>	

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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?
30/08/2022	STR001	1	Straton	CALLBK		JAE	●	●
21/12/2022	STR001	1	Straton	01CHACLI	Chase client for a response	JAE	●	●

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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 Eerner:

Filter By Key Dates:

Filter By Keydate Type:

Filter By Dates: To

DATE	↑	CLIENT	TYPE
30/08/2022		STR001	CAL
21/12/2022		STR001	010

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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

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 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		

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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
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

Save Cancel Delete

Client No: STR001
Matter No: 1
Key Date: 30/08/2022
Key Date Type: CALLBK
Notes:
Fee Earner: MO
Date Met?
Create Diary Appointment? All Day AM
Published?

