# Osprey Approach: Adding and Managing Key Dates (App)

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The latest version is always online at https://support.ospreyapproach.com/?p=52891

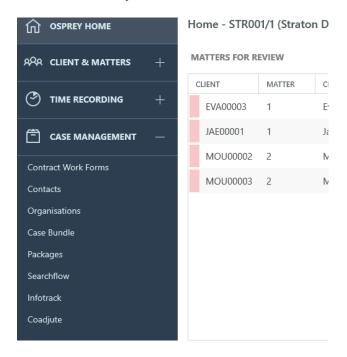
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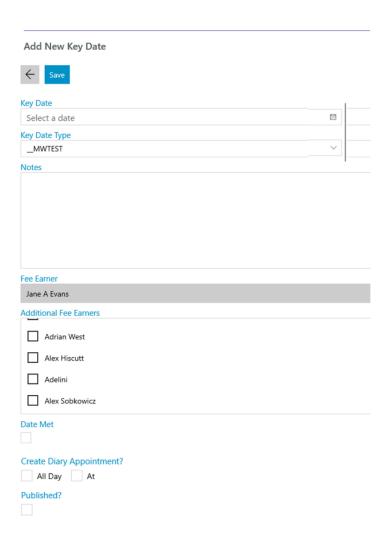
Osprey allows users to add Key Dates to their matters as a reminder to do something on the matter

# Adding a Key Date

Key Dates can be added from the Case management area of Osprey . Navigate to Case Management - then click the Key Dates Button



Now select +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.



Key Date - Type or select a date from the calender 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 - Type in any notes you may need for this key date.

Fee Earner - Displays the Fee Earner on the Matter

Additional Fee Earners - If additional fee earners need to be aware of this key date they can be selected from the list.

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

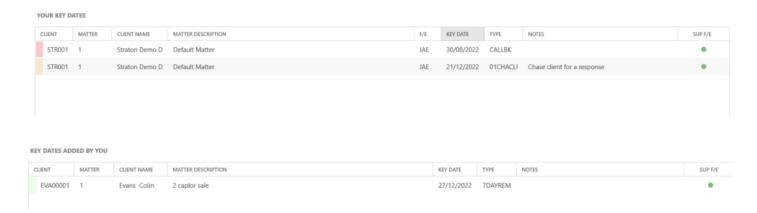
You can view a list of your key dates in two places in the case management app

1. From the Home screen

## 2. From the Case Management Key Dates 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.



Key dates in Red are overdue for attention

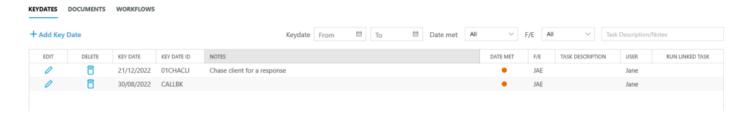
Keydates in Orange are due for attention today

Keydates 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 Right clicking on the line of the key date

# Case management

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

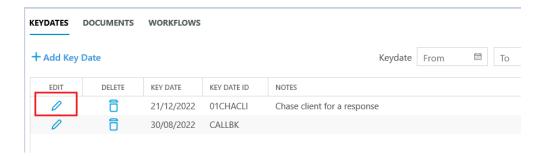


# Managing your key dates

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



this will open the same details screen used when creating the key date and you can now edit any of those details

# 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 key dates 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

