

Osprey Approach: Adding and Managing Key Dates (App)

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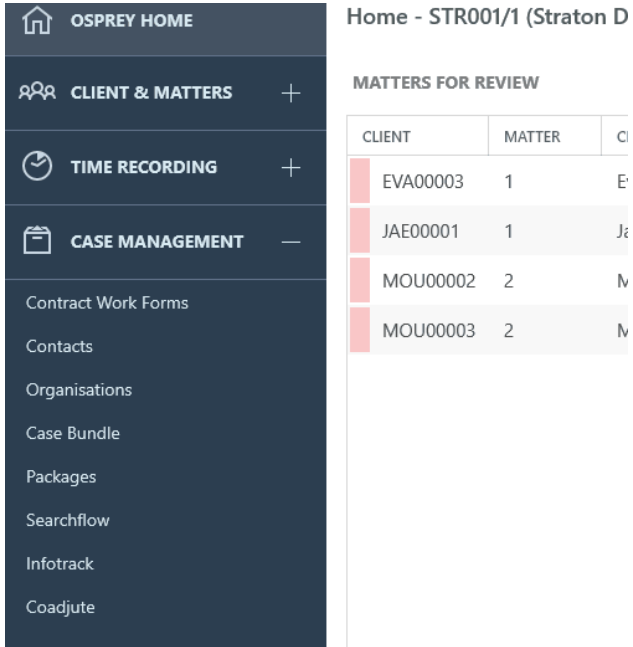
The latest version is always online at
<https://support.ospreyapproach.com/?p=52891>



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



The screenshot shows the Osprey user interface. On the left is a dark sidebar with navigation options: 'OSPREY HOME', 'CLIENT & MATTERS', 'TIME RECORDING', and 'CASE MANAGEMENT'. Under 'CASE MANAGEMENT', there is a list of sub-items: 'Contract Work Forms', 'Contacts', 'Organisations', 'Case Bundle', 'Packages', 'Searchflow', 'Infotrack', and 'Coadjute'. The main content area is titled 'Home - STR001/1 (Straton D)' and contains a table labeled 'MATTERS FOR REVIEW'. The table has three columns: 'CLIENT', 'MATTER', and 'CI'. It lists four rows of data:

CLIENT	MATTER	CI
EVA00003	1	E
JAE00001	1	J
MOU00002	2	M
MOU00003	2	M

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.

Add New Key Date

← Save

Key Date
Select a date

Key Date Type
_MWTEST

Notes

Fee Earner
Jane A Evans

Additional Fee Earners

- Adrian West
- Alex Hiscutt
- Adelini
- Alex Sobkowicz

Date Met

Create Diary Appointment?
 All Day At

Published?

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 - 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.

YOUR KEY DATES

CLIENT	MATTER	CLIENT NAME	MATTER DESCRIPTION	F/E	KEY DATE	TYPE	NOTES	SUP F/E
STR001	1	Straton Demo D	Default Matter	JAE	30/08/2022	CALLBK		
STR001	1	Straton Demo D	Default Matter	JAE	21/12/2022	01CHACLI	Chase client for a response	

KEY DATES ADDED BY YOU

CLIENT	MATTER	CLIENT NAME	MATTER DESCRIPTION	KEY DATE	TYPE	NOTES	SUP F/E
EVA00001	1	Evans Colin	2 caplor sale	27/12/2022	7DAYREM		

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

KEYDATES DOCUMENTS WORKFLOWS

+ Add Key Date

Keydate From To Date met All F/E All Task Description/Notes

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

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

KEYDATES DOCUMENTS WORKFLOWS

[+ Add Key Date](#) Keydate From To

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

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

[Change Client/Matter](#) [Email](#) [Conflict of Interest](#) [Enable Client Web Access](#) [Send SMS](#) [Document Production](#)

KEYDATES DOCUMENTS WORKFLOWS

[+ Add Key Date](#) Keydate From To Date met All F/E All

EDIT	DELETE	KEY DATE	KEY DATE ID	NOTES	DATE MET	F/E
		21/12/2022	01CHACLI	Chase client for a response	<input type="checkbox"/>	JAE
		30/08/2022	CALLBK		<input type="checkbox"/>	JAE