Osprey Approach: Batch Key Date ticking
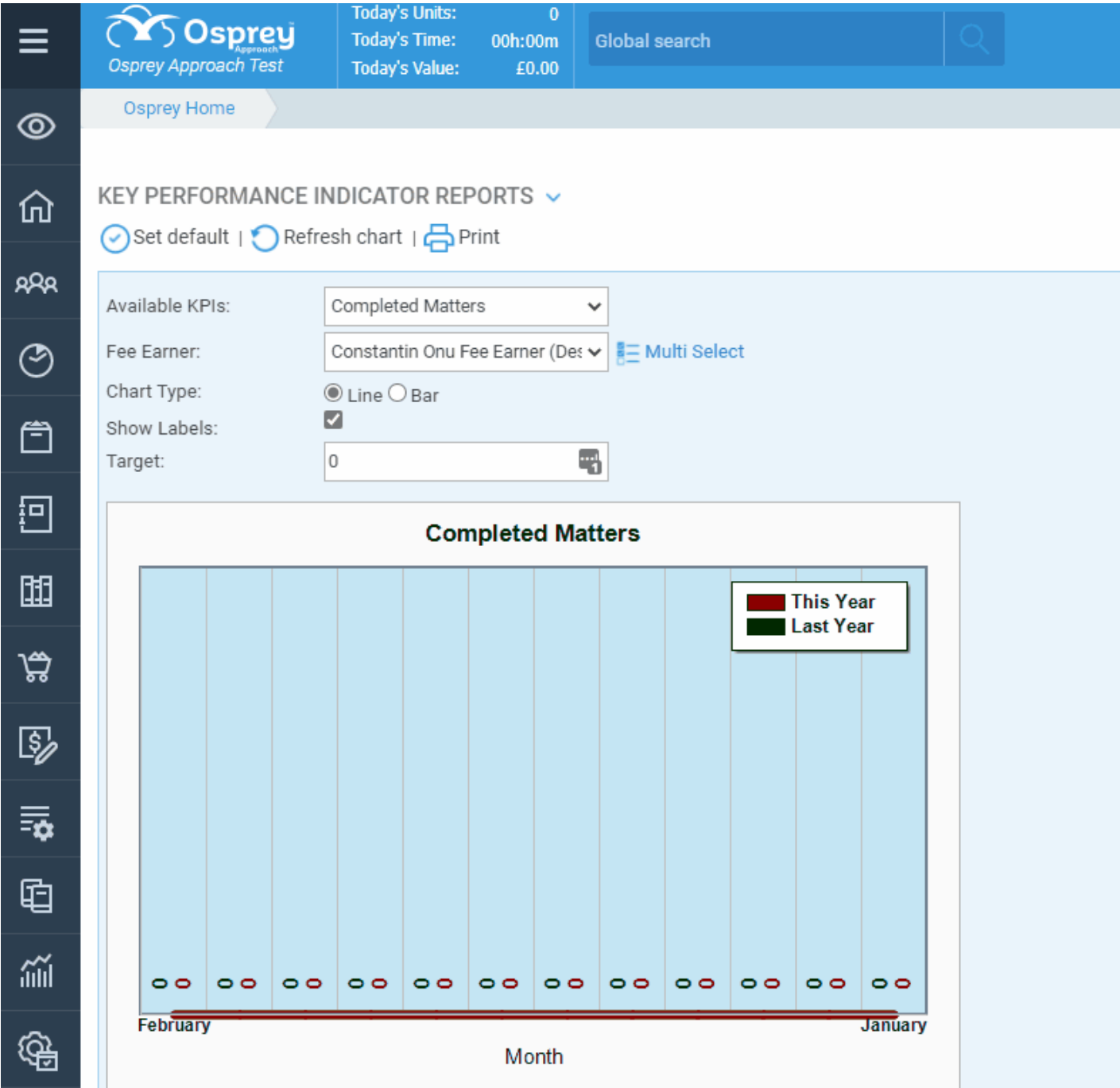
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If your fee earners have multiple key dates in progress, you will be able to mark them all as met in one go. This guide will demonstrate this process.

Navigate to the Supervisor > Case Management Setup > Key Date Types > Batch Key Date Ticking.

	CLIENT	MATTER	SURNAME	MATTER DESCRIPTION	KEY DATE	KEY DATE TYPE
☐	A00001	1	Adams	Purchase of Rose Cottage	02/08/2018	CHASESOL
☐	A00001	1	Adams	Purchase of Rose Cottage	02/08/2018	CHSE_ESTAG
☐	A00001	1	Adams	Purchase of Rose Cottage	26/09/2018	10WEEK
☐	A00001	1	Adams	Purchase of Rose Cottage	27/09/2018	10WEEK
☐	A00001	2	Adams	Theft	25/02/2019	CHASECLI
☐	A00001	2	Adams	Theft	28/02/2019	HEARINGDAT
☐	A00001	2	Adams	Theft	05/03/2019	CHASECLI
☐	A00001	2	Adams	Theft	05/03/2019	CHASECLI
☐	A00001	2	Adams	Theft	18/03/2019	COURTDATE
☐	A00004	1	Andrews	Potential Client - Chamber of Commerce contact	02/08/2018	10WEEK

Page 1 of 24 (236 items) « ‹ ① 2 ... 24 › »   Page size: 10 ∨

You can filter by Type, Fee Earner and Date as appropriate. You can also search for any key dates if required.

Tick the key dates you wish to mark as met using the tick box on the left hand side.

Now click the Save button and confirm by clicking OK.