



# Osprey Approach: Batch Key Date ticking

This help guide was last updated on  
Jan 3rd, 2023

The latest version is always online at  
<https://support.ospreyapproach.com/?p=685>



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.

The screenshot displays the Osprey Approach Test dashboard. At the top, there is a navigation bar with the Osprey logo and 'Osprey Approach Test' text. To the right of the logo, it shows 'Today's Units: 0', 'Today's Time: 00h:00m', and 'Today's Value: £0.00'. A 'Global search' box is also present. Below the navigation bar, the main content area is titled 'KEY PERFORMANCE INDICATOR REPORTS'. It includes options to 'Set default', 'Refresh chart', and 'Print'. The 'Available KPIs' dropdown is set to 'Completed Matters'. The 'Fee Earning' dropdown is set to 'Constantin Onu Fee Earning (Des)'. The 'Chart Type' is set to 'Line', and 'Show Labels' is checked. The 'Target' is set to '0'. The chart itself is titled 'Completed Matters' and shows a comparison between 'This Year' (red bars) and 'Last Year' (green bars) across months from February to January. The chart shows zero values for both years across all months.

Today's Units: 0  
Today's Time: 00h:00m  
Today's Value: £0.00

Global search

Osprey Home

KEY PERFORMANCE INDICATOR REPORTS

Set default | Refresh chart | Print

Available KPIs: Completed Matters

Fee Earning: Constantin Onu Fee Earning (Des) Multi Select

Chart Type: Line Bar

Show Labels:

Target: 0

Completed Matters

This Year  
Last Year

February Month January

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

Key Date Type:

Fee Earner:

From:  To:

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

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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.