



Osprey Approach: Batch Key Date ticking

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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 blue header 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' bar is also present. Below the header, a navigation bar shows 'Osprey Home'. The main content area is titled 'KEY PERFORMANCE INDICATOR REPORTS' and includes options for 'Set default', 'Refresh chart', and 'Print'. The KPI configuration section shows 'Available KPIs: Completed Matters', 'Fee Earning: Constantin Onu Fee Earning (Des)', 'Chart Type: Line', 'Show Labels: checked', and 'Target: 0'. The chart itself is titled 'Completed Matters' and is a grouped bar chart comparing 'This Year' (red bars) and 'Last Year' (green bars) across months from February to January. The x-axis is labeled 'Month' and the y-axis represents the number of completed matters. The chart shows zero completed matters for both years across all months.

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.