

Osprey Approach: Enabling Tasks on Key Dates

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<https://support.ospreyapproach.com/?p=33070>

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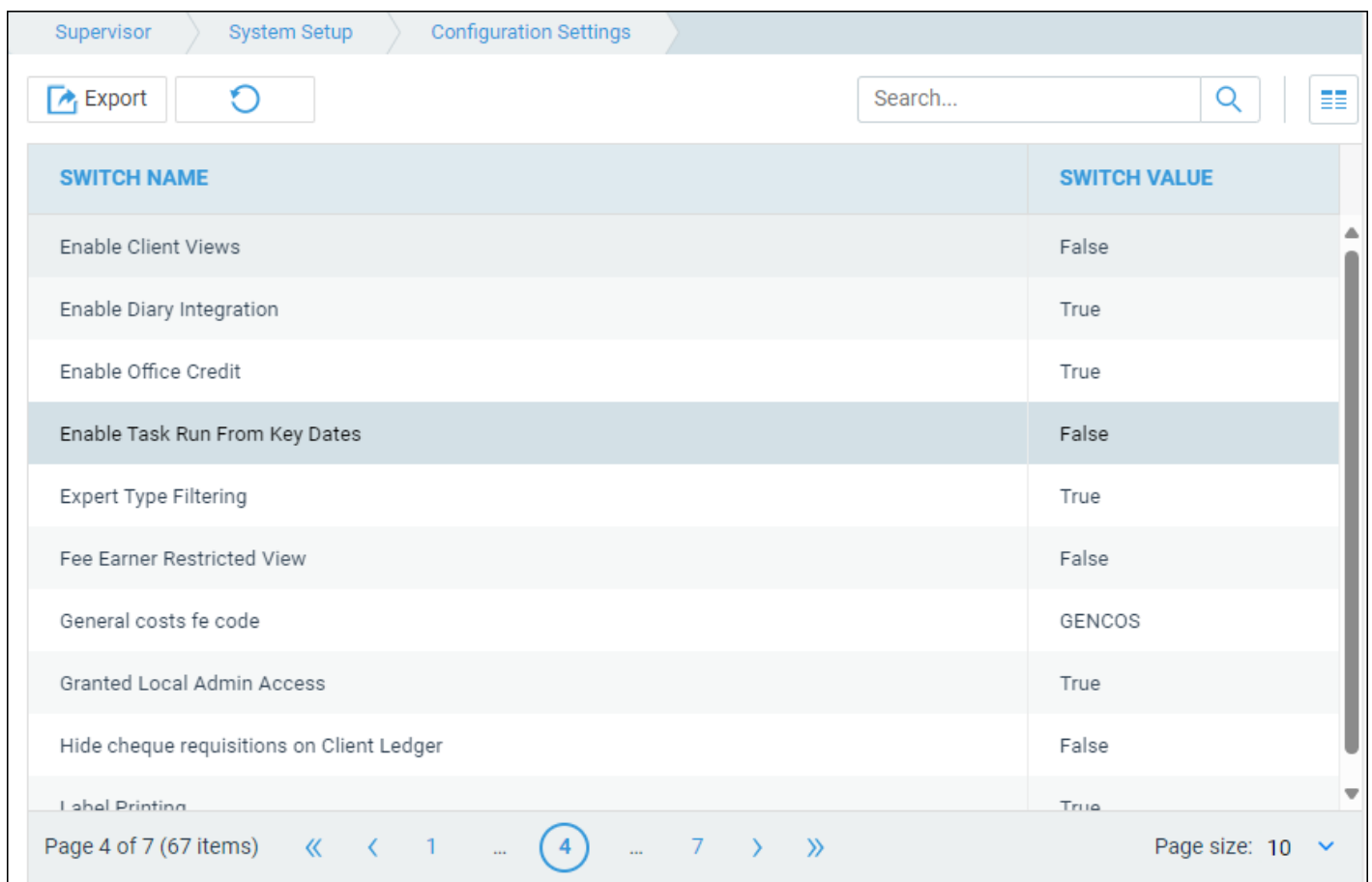


Osprey allows you to set a workflow task to be run from the Key Dates page, this can enable smoother running of a workflow. This guide will show you how to set this up

As an example, let's say that once you have received the confirmation from the client that they have signed all the required documents for completion and paid their balance, you then want to ensure that the following day you run the completion workflow task. The key date can be set to show the option to run your completion task as a Linked Task.

Set up the ability to run Tasks from Key Dates

Firstly, we'll need to turn on the ability to run a task from a Key Date. Navigate to Supervisor > System Set up > Configuration Settings. Locate the switch called **Enable Task Run From Key Dates**:



The screenshot shows the 'Configuration Settings' page in the Osprey system. The breadcrumb navigation is 'Supervisor > System Setup > Configuration Settings'. There are 'Export' and 'Refresh' buttons, a search bar, and a menu icon. A table lists various configuration switches. The switch 'Enable Task Run From Key Dates' is highlighted in blue and has a value of 'False'. The page number '4' is circled in the footer, and the page size is set to '10'.

SWITCH NAME	SWITCH VALUE
Enable Client Views	False
Enable Diary Integration	True
Enable Office Credit	True
Enable Task Run From Key Dates	False
Expert Type Filtering	True
Fee Earner Restricted View	False
General costs fe code	GENCOS
Granted Local Admin Access	True
Hide cheque requisitions on Client Ledger	False
Label Printing	True

Right click, select Edit, and set this to True, then Save.

Supervisor > System Setup > Configuration Settings > ... > Edit

Save Cancel

Switch Name:
Enable Task Run From Key Dates

Switch Value:
True
True
False

Set a Task to run from a Key Date

Now, navigate to Supervisor > Case Management Setup > Tasks. Select the Task you want to run from the key date, or create a new one. In the example below, we have chosen the previous task to the completion task in the Purchase workflow.

Right click the task you want to add the key date linked task to, and click Link:

New Refresh Work Type: Residential Conveys Show Global Tasks

TASK DESCRIPTION	TASK WEB DESCRIPTION	TASK WORKTYPE
Pre-Contract Report TK_RCP	Pre-Contract Report	TK_RCP
EXCHANGE TK_RCP	EXCHANGE	TK_RCP
Pre-Completion Searches Submitted TK_RCP	Pre-Completion Searches Submitted	TK_RCP
Pre-Completion Searches Received TK_RCP	Pre-Completion Searches Received	TK_RCP
Received Mortgage Advance & Balance from Client TK_RCP	Received Mortgage Advance & Balance from Client	TK_RCP
COMPLETION TK_RCP	COMPLETION	TK_RCP
Register at HMLR TK_RCP	Register at HMLR	TK_RCP
Send Notice of Assignment of Life Policy TK_RCP	Send Notice of Assignment of Life Policy	TK_RCP
Registration Completed TK_RCP	Registration Completed	TK_RCP
Close File TK_RCP	Close File	TK_RCP

Context menu for 'Received Mortgage Advance & Balance from Client TK_RCP':
 Edit
 Link

Then, link a Key Date action to the task. You will notice key date actions display a chain link icon on the right hand side of the options list:

Supervisor > Case Management Setup > Workflows > Link Actions

Save Cancel Collapse/Expand All Save and Go Back

ACTIONS LINKED TO TASK

- Ask user for text input**
 - Ask user for text input
 - Has Mortgage Advance Been Received?*
- Ask user for text input**
 - Ask user for text input
 - Has Balance Been Received from Client?*
- Meet Unmet Keydates by Type**
 - Meet Unmet Keydates by Type
 - CHASECLI*
- Meet Unmet Keydates by Type**
 - Meet Unmet Keydates by Type
 - CHASELEND*
- Add an automatic Keydate to matter**
 - Add an automatic Keydate to matter


Select the chain link icon. You can now link the task (which must be of the same work type) that you want to run based on this key date.

Supervisor > Case Management Setup > Tasks > KeyDate Action Link Task

Back to task

There is no task linked to the action

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TASK	WORK TYPE	
Received Mortgage Advance & Balance from Client TK_RCP	TK_RCP	Link
COMPLETION TK_RCP	TK_RCP	Link 
Register at HMLR TK_RCP	TK_RCP	Link
Send Notice of Assignment of Life Policy TK_RCP	TK_RCP	Link
Registration Completed TK_RCP	TK_RCP	Link
Close File TK_RCP	TK_RCP	Link
Completion Statement to Buyer TK_RCP	TK_RCP	Link
Check Documents/Replies to Requisitions TK_RCP	TK_RCP	Link
Submit SOLT TK_RCP	TK_RCP	Link
File Opening TK_RCP	TK_RCP	Link
Pre Exchange TK_RCP	TK_RCP	Link
Global Send Email task	GLOBAL	Link
Send Search results to client	TK_RCP	Link

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Run the Workflow Tasks

Now that we have set up the key date to run the Completion task, we can run the task before it. Navigate to Case Management > Workflows. Run the task that contains your key date linked to task.

Case Management	Workflows	TH0001/1 (Thompson Delilah) FE:MAB WT:TK_RCP Purchase of 24 Park Lane, W1 1AA
Approve Contract & Raise Enquiries TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)		
Pre-Contract Searches TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)		
Check Title TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)		
Check Replies to Enquiries TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)		
Check Results of Searches TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)		
Pre-Contract Report TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)		
Pre-Exchange TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)		
EXCHANGE TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)		
Pre-Completion Searches Submitted TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)		
Completion Statement to Buyer TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)		
Pre-Completion Searches Received TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)		
Check Documents/Replies to Requisitions TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)		
Received Mortgage Advance & Balance from Client TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP) Ticked 23/02/2021		
COMPLETION TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)		

Now, when your fee earner selects this key date from their home page, and is taken to the Key Dates page in Case Management, there will be the option to Run Linked Task. You can click this to be taken to the task which has been linked:

KEY DATE	KEY DATE ID	NOTES	DATE MET	F/E	TASK DESCRIPTION	USER	EDIT	RUN LINKED TA
19/11/2020	CHASECLI	Has Client Returned signed Terms and Conditions?	●	MAB	File Opening TK_RCP	supervisor		
06/01/2021	10WEEK	Redirected key date for Benmont	●	BT		supervisor		
24/02/2021	COMP_DATE	Ready for Completion	●	MAB	Received Mortgage Advance & Balance from Client TK_RCP	supervisor		

Alternatively, from the Home page, right clicking the key date and clicking Select will take you straight to the workflow:

F/E	CLIENT NAME	KEY DATE	TYPE	SUP F/E?	ASSIGN F/E	MATTER DESCRIPTION	DESCRIPTION
MAB	Hewkins Dorian D L	22/10/2020	COURT	●	Mitz Broom	Intent to supply	In Court-
MAB	Nakamura Hiro H	05/11/2020	SEARCHFLOW	●	Mitz Broom	Purchase of Kenso Cottage, Christawa	Searchflow
MAB	Johnson Andrew AN	11/11/2020	7DAY	●	Mitz Broom	PKOV Testing November 2020	7 Day Chase
MAB	Johnson Andrew AN	11/11/2020	BR ACTION	●	Mitz Broom	PKOV Testing November 2020	Action on Breach
MAB	Saunders Nik N	01/01/2021	10WEEK	●	Mitz Broom	ADP1	10 Week Response
MAB	Thompson Delilah	24/02/2021	COMP_DATE	●	Mitz Broom	Purchase of 24 Park Lane, W1 1AA	