

Osprey Approach: Redirect Key Dates from one fee earner to another

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Jan 3rd, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=550>

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Should one of your fee earners be away from the office for a period of time, you can redirect their Key Dates to another fee earner, to ensure that important appointments are not missed.

To redirect a fee earner's key dates

Osprey Approach Test

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 Earner: Constantin Onu Fee Earner (Des) Multi Select

Chart Type: Line Bar

Show Labels:

Target: 0

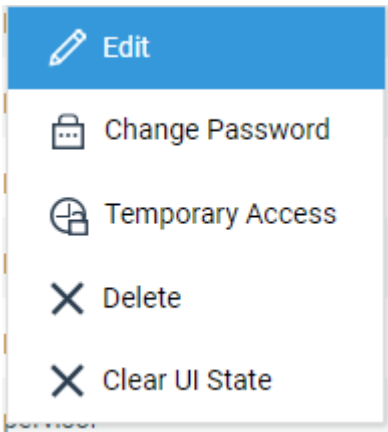
Completed Matters

This Year
Last Year

February Month January

Navigate to Supervisor > System Setup > Users

Look for the user whose key dates you would like to redirect.




Right click and select Edit

There will be a drop-down box for Redirect Key Dates.



| | |
|--------------------------|----------------------------------------------------|
| User Id: | <input type="text" value="RICHARD"/> |
| Template: | <input type="text" value="Supervisor"/> |
| Email: | <input type="text" value="richard@pracctice.net"/> |
| Fee Earner: | <input type="text" value="Rich Wood"/> |
| Redirect Keydates: | <input type="text" value="None"/> |
| StylePath: | <input type="text" value="Default"/> |
| Preferred Ledged View: | <input type="text" value="Default View"/> |
| Financial Security View: | <input type="text" value="Month End"/> |



Select the Fee Earner you would like to redirect the key dates to

Click on the Save button.

All key dates will now be redirected to the relevant Fee Earner.

Please Note: The key dates will still be visible on the original fee earner's home page and remain allocated against the original fee earner ID. Also note that only key dates within the specified

review date range will be visible on the home page.