Osprey Approach: Enabling Tasks on Key Dates

This help guide was last updated on
Apr 11th, 2024

The latest version is always online at
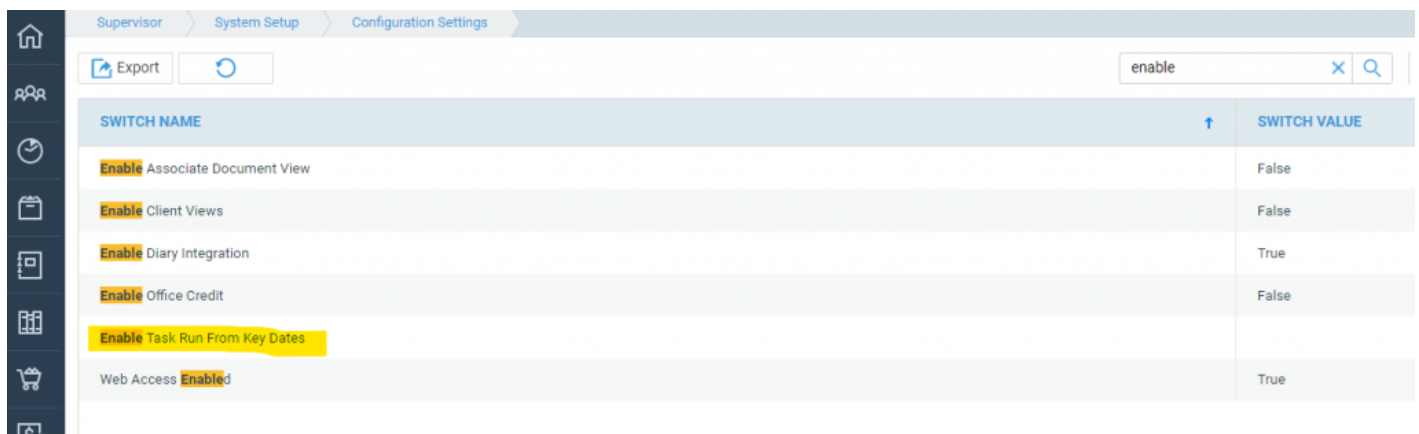https://support.ospreyapproach.com/?p=33070

Osprey allows you to set a workflow task to be run from the Key Dates page, this can enable smoother running of a workflow.

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.
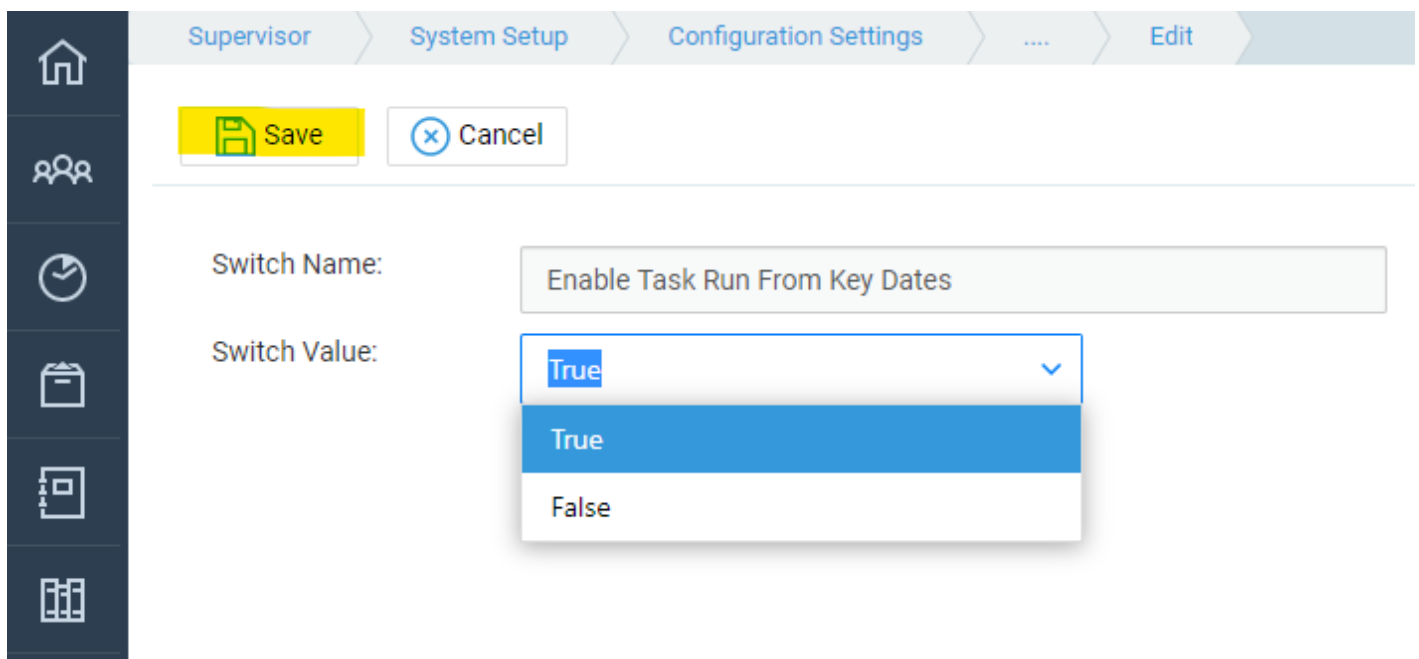
Set up the ability to run Tasks from Key Dates

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

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

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:

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:

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.
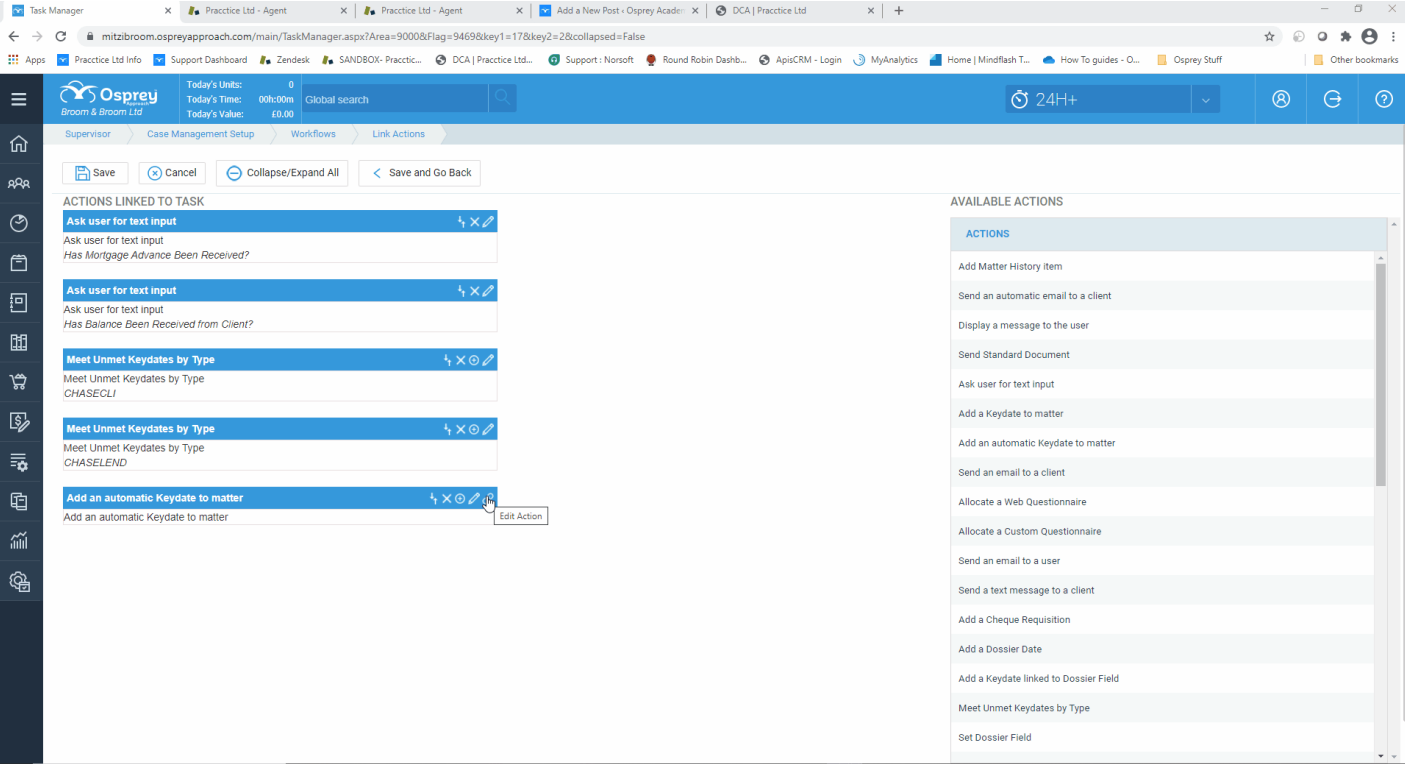
Click to enlarge

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.

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	✎	◷

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Legend

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