

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 > Configuration Settings. Locate the switch called **Enable Task Run From Key Dates:**

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	enable enable	XQ									
	SWITCH NAME T	SWITCH VALUE									
0	Enable Associate Document View										
Ē	Enable Client Views										
•	Enable Diary Integration	True									
	Enable Office Credit	False									
	Enable Task Run From Key Dates										
, ‡	Web Access Enabled	True									
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Right click, select Edit, and set this to True, then Save.

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G	Switch Name:	Enable Task Run From Key Dates			
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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:

TASK WORKTYPE			
TK_RCP			

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 Save Cancel	< Save and Go Back
ACTIONS LINKED TO TASK	
Ask user for text input	4×2
Ask user for text input Has Mortgage Advance Been Received?	
Ask user for text input	$_{t}^{4} \times \mathcal{O}$
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	⁺t X ⊕ 🖉
Meet Unmet Keydates by Type CHASELEND	
Add an automatic Keydate to matter	⁺×⊕ℤℤ
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.

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← → C 🔒 mitzibroom.ospreyapproach.com/main/TaskManager.aspx?Area=9000&Flag=9469&key1=17&key2=2&collapsed=False		* 🕑 🛛 🛪 \varTheta 🗄
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Supervisor Case Management Setup Workflows Link Actions		
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ACTIONS LINKED TO TASK	AVAILABLE ACTIONS	
Ask user for text input 4 × ℓ Ask user for text input 4 × ℓ	ACTIONS	^
Has Mortyage Advance Been Received?	Add Matter History item	×
Ask user for text input ¹ x × ℓ Ask user for text input ¹ x × ℓ	Send an automatic email to a client	
Has Balance Been Received from Client?	Display a message to the user	
Meet Unmet Keydates by Type [↓] ★ ⊙ <i>P</i>	Send Standard Document	
Meet Unmet Keydates by Type CHASECLI	Ask user for text input	
Meet Unmet Keydates by Type	Add a Keydate to matter	
Meet Linnet Keydates by Type	Add an automatic Keydate to matter	
CHASELEND	Send an email to a client	
Add an automatic Keydate to matter	Allocate a Web Questionnaire	
Add an automatic Keydate to matter	Allocate a Custom Questionnaire	
	Send an email to a user	
	Send a text message to a client	
	Add a Cheque Requisition	
	Add a Dossier Date	
	Add a Keydate linked to Dossier Field	
	Meet Unmet Keydates by Type	
	Set Dossier Field	
		* *

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.

谕	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)
ନ୍ୟର	Pre-Contract Searches TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)
I	Check Title TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)
Ē	Check Replies to Enquiries TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)
	Check Results of Searches TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)
Ð	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)
\$7	Completion Statement to Buyer TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)
-₽	Pre-Completion Searches Received TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)
Ē	Check Documents/Replies to Requisitions TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP)
áíí	Received Mortgage Advance & Balance from Client TK_RCP (Workflow:Residential Conveyancing Purchase TK_RCP) Ticked 23/02/2021
ര	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 ID	NOTES	DATE MET	F/E	TASK DESCRIPTION	USER	EDIT	RUN LINKED TA
CHASECLI	Has Client Returned signed Terms and Conditions?	•	MAB	File Opening TK_RCP	supervisor	0	
10WEEK	Redirected key date for Benmont	•	BT		supervisor	0	
COMP_DATE	Ready for Completion	•	MAB	Received Mortgage Advance & Balance from Client TK_RCP	supervisor	0	\odot
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	CHASECLI 10WEEK COMP_DATE	CHASECLI Has Client Returned signed Terms and Conditions? 10WEEK Redirected key date for Bermont	CHASECLI Has Client Returned signed Terms and Conditions? 10WEEK Redirected key date for Bernmont COMP_DATE Ready for Completion	CHASECLI Has Client Returned signed Terms and Conditions? A MAB 10WEEK Redirected key date for Benmont • BT COMP_DATE Ready for Completion • MAB	CHASECLI Has Client Returned signed Terms and Conditions ¹ MAB File Opening TK_RCP 10WEEK Redirected key date for Bermont • BT COMP_DATE Ready for Completion • MAB Received Mortgage Advance & Balance from Client TK_RCP	CHABECLI Has Client Returned signed Terms and Conditions? Amage File Opening TK_RCP supervisor 10WEEK Redirected key date for Benmont e BT supervisor supervisor COMP_DATE Ready for Completion e MAB Received Mortgage Advance & Balance from Client TK_RCP supervisor	CHASECLI Has Client Returned signed Terms and Conditions ¹ Ma File Opening TK_RCP Supervisor I 10WEEK Redirected key date for Bermont • BT Supervisor I cOMP_DATe Ready for Completion • MAB Received Mortgage Advance & Balance from Client TK_RCP Supervisor I

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

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命	Osprey Home														
	F/E	CLIEN	TNAME	KEY DATE 🕇	TYPE	SUP F/E?		ASSIGN F/E			MATTER DESCRIPTION	DESCRIPTION			
ନ୍ୟର୍	MAB	Hawkins	Dionne D L	22/10/2020	COURT	•		Mitzi Broom	~		Intent to supply	In Court -			*
I	MAB	Nakam	ura Hiro H	05/11/2020	SEARCHFLOW	•		Mitzi Broom	~		Purchase of Kenso Cottage, Chinatown	SearchFlow			
æ	MAB	Johnson	Andrew AN	11/11/2020	7DAY	•		Mitzi Broom	~		PROW Testing November 2020	7 Day Chase			
Ē	MAB	Johnson	Andrew AN	11/11/2020	BR_ACTION	•		Mitzi Broom	~		PROW Testing November 2020	Action on Breach			
: -	MAB	Saunde	ers Niki N	31/01/2021	10WEEK	•		Mitzi Broom	~		ABH	10 Week Response			
Ē	MAB	Thomps	on Delilah	24/02/2021	COMP_DATE	•		Mitzi Broom	~		Purchase of 24 Park Lane, W1 1AA	Completion date			
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