

Osprey Approach: Create and Edit Workflow Tasks

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The latest version is always online at
<https://support.ospreyapproach.com/?p=332>

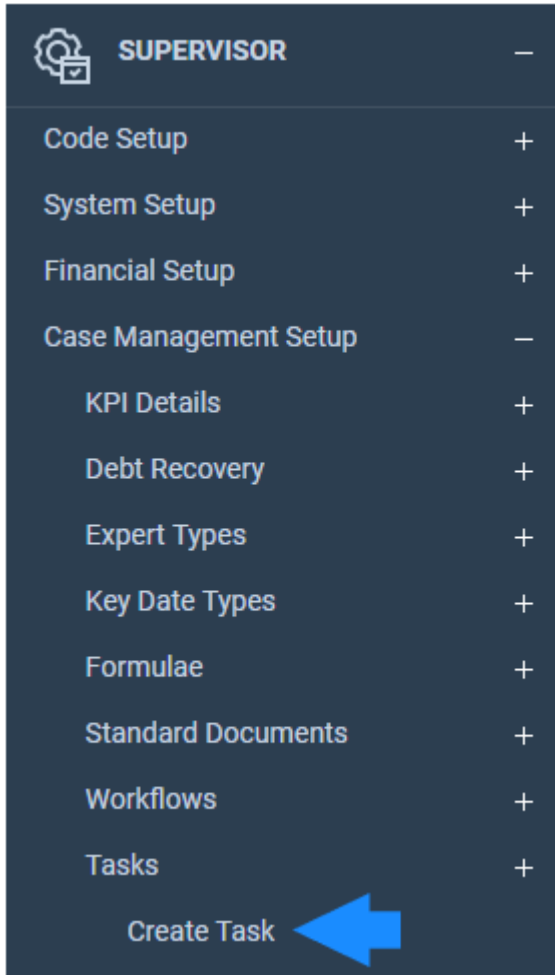
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This guide will go through creating and amending your workflow tasks to tailor them to the needs of your firm. Which may in turn be linked to workflow <https://support.ospreyapproach.com/guides/create-and-edit-workflow/>

Add a Basic Workflow Task

In the 'Supervisor' area of Osprey, go to 'Case Management Setup'. To create a new task (or step) to house the document, go to 'Tasks', then select 'Create Task'.



Give the task a description. If you use the Client Portal, enter a Web Description. Now choose the work type that this task will be used for and click 'Save' to save the new task.

Save

Copy

Cancel

Task
Description:

Initial Letters

Task Web
Description:

Initial Letters

Task Worktype:

Residential Conveyanc

You now need to add some actions to this task. Right-click on the relevant task and then select the 'Link' button to open up your options.

The actions available are as follows:

- Add Matter History item
- Send an automatic email to a client
- Display a message to the user
- Send Standard Document
- Ask user for text input
- Add a Keydate to matter
- Add an automatic Keydate to matter
- Send an email to a client
- Allocate a Web Questionnaire
- 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
- Open a read-only document
- Display a Matter View
- Display a Matter View in Web Publisher
- Display a Client View in Web Publisher
- Send XIT2 Acknowledgement
- Send XIT2 Milestone Info
- Tick Task
- Run IHT205
- Run IHT400
- Send merged email template
- Post to Debt Ledger

- View Debt Summary
- Posting to Time Ledger
- Send an automatic email to a user
- Unpublish a Published Matter
- Update Workflow Status Bar
- Update Chain View Status
- Produce Oyez Form
- Produce Land Registry Search

Select the action you want to insert into your workflow task by right clicking and then choosing the 'Select' button.

In our example we will add a 'Send Standard Documents' action, which will run one of your standard documents available in Osprey and then, when closed, give you the option to save the document to the matter history.

Once you have selected the 'Send Standard Document' task, a list of available documents will be shown. These will all be of the same worktype as the selected task.

Standard Documents : Work Type = TK_RCP
 Select Expert Type
 (None)

Select Document Type
 Standard ▾

Description	Expert Type	Link
RCP Cli Care Letter	CLIENT	<input type="checkbox"/>
Blank Client Letter TK_RCP	CLIENT	<input type="checkbox"/>
Blank Est Agent Letter TK_RCP	ESTAGENT	<input type="checkbox"/>
Blank Lid/Mg Agent Letter TK_RCP	MANAGEAG	<input type="checkbox"/>
Blank Mtg Letter TK_RCP	MORTLEND	<input type="checkbox"/>
Blank Sol Letter TK_RCP	SOLICITOR	<input type="checkbox"/>
Otherside Completion Letter	CLIENT	<input type="checkbox"/>
RCP All Monies Charge - Acknowledgement TK_RCP	FORMS	<input type="checkbox"/>
RCP All Monies Charge - Notes TK_RCP	FORMS	<input type="checkbox"/>
RCP AP1- Application to Change the Register TK_RCP	FORMS	<input type="checkbox"/>

1 2 3 4 5 6 7

Save | Cancel

Tick the box in the 'Link' column for any letters you wish to include in your task, then select the 'Save' icon. Your letters will now appear on the left-hand side.

Save Cancel Collapse/Expand All Save and Go Back

ACTIONS LINKED TO TASK

Send Standard Letter [↑] [X] [⊕]
Send Standard Document
RCP Est Request Memo of Sale TK_RCP

Send Standard Letter [↑] [X] [⊕]
Send Standard Document
RCP Sol Initial Letter TK_RCP

Send Standard Letter [↑] [X] [⊕]
Send Standard Document
RCP Leasehold Enquiries TK_RCP

Add an automatic Keydate to matter [↑] [X] [⊕] [✎] [🔗]
Add an automatic Keydate to matter

Add an automatic Keydate to matter [↑] [X] [⊕] [✎] [🔗]
Add an automatic Keydate to matter

Add an automatic Keydate to matter [↑] [X] [⊕] [✎] [🔗]
Add an automatic Keydate to matter

Click on the 'Save' icon in the top left to keep your changes to the task.


The task will now need to be linked to the Workflow you wish to use it in. Go to your 'Supervisor' area in the left-hand side panel and select 'Case Management Setup'.

Now select 'Workflows' to open the list of currently available workflows.

Go through the list and locate the workflow you wish to add the task to. Right-click on it and select the 'Link Tasks' icon.

On the right hand side of the screen, locate your newly created task and click the 'Select' icon.

AVAILABLE TASKS


Search... 

- Documents Received from Client TK_RCP
- Initial Letters TK_RCP
- Acknowledgement to Client & Agent TK_RCP
- Receipt of Draft Contract TK_RCP
- Approve Contract & Raise Enquiries TK_RCP
- Pre-Contract Searches TK_RCP
- Check Title TK_RCP
- Check Replies to Enquiries TK_RCP
- Check Results of Searches TK_RCP


AVAILABLE WORKFLOW SECTIONS


- Stages

Your task will now appear on the left-hand side. You will be able to see the details of the actions which make up your task. Select the 'Save' icon in the top left to keep your changes.




 Save

 Cancel

 Collapse/Expand All

 Back to Previous Page

TASKS LINKED TO WORKFLOW

Initial Letters TK_RCP   

Send Standard Letter
RCP Est Request Memo of Sale TK_RCP

Send Standard Letter
RCP Sol Initial Letter TK_RCP

Send Standard Letter
RCP Leasehold Enquiries TK_RCP

Add an automatic Keydate to matter

Add an automatic Keydate to matter

Add an automatic Keydate to matter

Now click 'Back' to return to your workflows list.

You are able to edit any of your existing tasks. Go to 'Supervisor' and select 'Case Management Setup', then click on 'Tasks'. Select the relevant worktype and then right-click on the task and select 'Link' to bring up the task details.

You may add new actions using the method described previously. You can also drag and drop existing actions by holding down the left mouse button on the relevant action and dragging it to the appropriate place.

Once you have finished editing, select 'Save'.

Adding Criteria to Workflow Tasks

Actions that can have criteria set against them will have the following symbol showing to the right hand side of the actions heading.



Send Standard Document   

Send Standard Document
RCS Est Request Docs TK_RCS

This option gives the ability to set criteria on certain action types and, once set, criteria can decipher whether an actual action is run or not dependent on information filled in on a client's file and matter. Criteria can be set on the following action types

- Send an automatic email to a client
- Send Merged Email Template
- Send an automatic email to a user
- Display a message to a user
- Send Standard Letter






- Add an automatic key date to a matter
- Allocate a custom questionnaire
- Send an email to a user
- Send a text message to a client
- Add a key date linked to a dossier field
- Meet unmet key dates by type
- Open a read only document
- Tick Task

Criteria is set based on existing data held on a client's matter and file. This can be information held at both Client and Matter level, for example, standard system information such as details from the address page or matter page. If available, information can be used from both Client and Matter level dossier pages.


ACTION CRITERIA

Action Criteria Details


 Save |  Close

Logical operator:	OR	
Dossier?	<input type="checkbox"/>	
Table	Client	
Field	Area	
Operator	Equal	
Value	<input type="text"/>	

Logical Operator - Use the 'Or' Option if you wish an action to run when either one or more criteria are met. Use the 'And' Option if you only wish an action to run if it meets multiple set criteria.

Logical operator:	OR	
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If Dossier remains unchecked, you will have the ability to set criteria based on standard system information from the areas shown within the drop down menu.

Dossier?	<input type="checkbox"/>	
Page	Client	

If you check the Dossier option, you will have access to Dossier pages (both client level and matter specific) and the fields within them, this will depend on the system set-up

When setting criteria you also have the following functions available:

Operator	Equal
Value	yes

TABLE

Equal to: When added, the operator will display as '='. Use this option when you wish an action to run if the selected field's data is equal to the specified criteria.

Not Equal: When used, the operator will display as 'N'. Use this option when you wish an action to run if the field's data is not equal to the specified criteria.

Greater Than: When used, the operator will show as '>'. Applicable when setting criteria against numeric values/fields. Use this option if you wish an action to run if the selected field's data is greater than specified criteria.

Less Than: When used, the operator will show as '<'. Applicable when setting criteria against a numerical value/field. Use the option if you wish an action to run if the selected field's data is less than the specified criteria.

Is Empty: When used, the operator will show as 'E'. Applicable when setting criteria against fields that have not had any data added to them such as a date box or text box. Use this option if you wish an action to run if the selected field's data is empty.

Is Not Empty: When used, the operator will show as 'F'. Applicable when setting criteria against fields that have had any data added to them. Use this option if you wish an action to run if the fields contain data.

Click the Add icon



TABLE	FIELD	OPERATOR	VALUE	DELETE
TK_RCS_FININFO	1L_EXIST_MORT	=	Yes	

You may add further criteria if you desire and click Save when finished.