



Osprey Approach: Create and Edit Workflow Tasks

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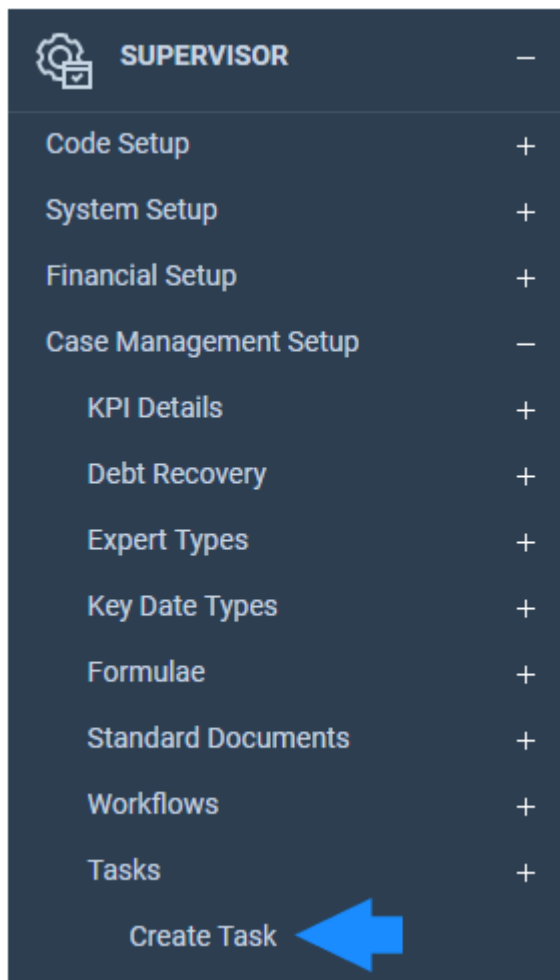
The latest version is always online at
<https://support.ospreyapproach.com/?p=332>



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.

Task Description:

Initial Letters

Task Web Description:

Initial Letters

Task Worktype:

Residential Conveyance

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:

Action	Description
Add Matter History Item	This action will add a pre-defined note to the relevant client's matter history
Send an Automatic Email to a Client	Sends a pre-defined email to the relevant client.
Display a Message to the User	Allows a string of text to display to the user running the workflow.
Send Standard Document	This action will automatically merge a standard Word document
Ask User for Text Input	The user running the workflow will be able to enter a string of text which is then recorded in the Matter History
Add a Keydate to Matter	The user will fill in the details of a key date whilst running the workflow. It will be added to the matter.
Add an Automatic Keydate to Matter	The key date type will be pre-defined, so that it can be created automatically when the task is run in a workflow.
Send an Email to a Client	You may send an email to a client using this action. The subject and body of the email can be filled in when the task is run.
Allocate a Web Questionnaire	You may submit a questionnaire to the Client Access Portal for review to fill in database and dossier fields

Action	Description
Allocate a Custom Questionnaire	Enter and/or review details in database and dossier fields
Send an Email to a User	You can send an email to another local user of Osprey.
Send a Text Message to a client	This action will allow you to send an SMS text message directly to a client's mobile. Please note that this is only available if you have subscribed to TextAnywhere. See our guide here.
Add a Cheque Requisition	Enables the user to fill in a requisition form.
Add a Dossier Date	Filling in this action during the task will add a specific value to a date field on the dossier.
Add a Keydate Linked to Dossier Field	This action will create a key date based on an offset from an existing dossier date. For example Hearing Date + 3 weeks.
Meet Unmet Keydates by Type	This action will meet any specified unmet key dates present on the current matter.
Set Dossier Field	This action will automatically add or update a specified value of an existing dossier field.
Open a Read-Only Document	This will open a PDF document while running the task. This document cannot be edited.
Tick Task	This can be used in conjunction with criteria to prevent a task being ticked unless fields are set to particular values
Send Merged Email Template	You will be able to send an email which has been set to include client and matter data.
Post to Debt Ledger	When this action is run you will able to select a posting to the Debt Ledger, there is also the possibility to print the Debt Ledger
View Debt Summary	This will present a view of the debt
Posting to Time Ledger	Displays the time posting screen to complete a time posting manually.
Send an automatic email to a user	A pre-defined email can be sent to a specified user from either the user or the matter fee earner
Unpublish a Published Matter	A published matter matter is edited to remove access to the Web Portal
Update Workflow Status Bar	The Workflow Status Bar is updated with pre-defined text

Action	Description
Produce Lexis Nexis Documents	This action will automatically merge a Lexis Smart Form



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 ▾

1 2 3 4 5 6 7			
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 Lld/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.

ACTIONS LINKED TO TASK

Send Standard Letter   	
Send Standard Document	
<i>RCP Est Request Memo of Sale TK_RCP</i>	
Send Standard Letter   	
Send Standard Document	
<i>RCP Sol Initial Letter TK_RCP</i>	
Send Standard Letter   	
Send Standard Document	
<i>RCP Leasehold Enquiries TK_RCP</i>	
Add an automatic Keydate to matter     	
Add an automatic Keydate to matter	
Add an automatic Keydate to matter     	
Add an automatic Keydate to matter	
Add an automatic Keydate to matter     	
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



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.

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?

☐

Table

Client

Field

Area

Operator

Equal

Value

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

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?

☐

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	TK_EXIST_MORT	=	Yes	

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