

Osprey Approach: Running a Workflow (App)

This help guide was last updated on
Dec 27th, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=52177>

[Click here for a printer-friendly version](#)



Workflows are made up of the tasks and actions required to complete a case from start to finish. Within each task can be a variety of automated actions. For example, sending letters and other documents to your clients, diarising key dates, and filling in questionnaires to capture client and matter information.

Load a workflow

Within the Case Management menu select Workflows.

Osprey Approach (3.0.0)

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS +

TIME RECORDING +

CASE MANAGEMENT +

CLIENT LEDGERS

BANKS & JOURNALS +

REPORTS +

SUPERVISOR +

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

00:00:00

Workflow Status Bar

Home - A123456/1 (Hiscutt Alex/Default Matter) FE: 01 WT: AEH

MATTERS FOR REVIEW

CLIENT	MATTER	CLIENT NAME	F/E	REVIEW DATE	TYPE	PERIOD	TIME LMD	LMD	
MAT0000001	4	Matt Carly C	CJM	26/05/2022		0		01/07/21	

YOUR KEY DATES

CLIENT	MATTER	CLIENT NAME	MATTER DES	F/E	KEY DATE	TYPE		SUP F/E
MAT0000001	1	Matt Carly C	Accident	CJM	31/05/2022	CHASEINVST		

I'm Posit, your virtual assistant! Please, tell me what you want to do...

Some work types may be set to load their default workflow as soon as a matter is added. If a workflow hasn't been loaded automatically, select Load Workflow. There may be more than one workflow available. The workflow can be previewed before it's loaded so that you can check it is the one you want to use.

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Case Management - A123456/1 (Hiscutt Alex/Default Matter) FE: 01 WT: AEH

Change Client/Matter

Email

Conflict of Interest

Enable Client Web Access

Send SMS

Document Production

KEYDATES

DOCUMENTS

WORKFLOWS

Load Workflow

Remove All

Search workflow task

☐

Client Level Workflows

I'm Posit, your virtual assistant! Please, tell me what you want to do...

Once the correct workflow has been found click Load to add the workflow to the matter.

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Global search

00:00:00

Workflow Status Bar

Case Management - A123456/1 (Hiscutt Alex/Default Matter) FE: 01 WT: AEH

[Change Client/Matter](#) [Email](#) [Conflict of Interest](#) [Enable Client Web Access](#) [Send SMS](#)
[Document Production](#)

KEYDATES DOCUMENTS **WORKFLOWS**

Load Workflow Remove All

Search workflow task

☐ Client Level Workflows

I'm Posit, your virtual assistant! Please, tell me what you want to do...

Run a workflow

From Case Management > Workflows, you will see a list of all the tasks included within a loaded workflow.

Each Task will have icons on the right hand side, the up/down arrow icon can be used to show or hide the actions list within the task.



Show/Hide Actions icon

Some actions can be unticked should they not be required. The forward arrow icon will run the workflow task.



Run Workflow icon

Load WorkflowRemove All

Search workflow task

☐ Client Level Workflows

File Opening (Residential Conveyancing Purchase FW_RCP)	↑	▶
Allocate a Custom Questionnaire:File Opening		✓
Client Care Pack (Residential Conveyancing Purchase FW_RCP)	↓	▶
Receipt of Estate Agent's Memorandum of Sale (Residential Conveyancing Purchase FW_RCP)	↓	▶
Received Contract (Residential Conveyancing Purchase FW_RCP)	↓	▶

When running the task you can step through the actions by clicking Next.

RUN TASK - CLIENT CARE PACK (RESIDENTIAL CONVEYANCING PURCHASE FW_RCP)

1 Allocate a Web Questionnaire

2 Add an automatic Keydate to matter

3 Add an automatic Keydate to matter

Next

ALLOCATE A WEB QUESTIONNAIRE

Allocating Web Questionnaire Client Instructions

When the last action has been run click End Task & Return. Returning to the workflows screen you will see the task is now green.

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Workflow Status Bar

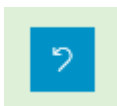
RUN TASK - RESPOND TO CLIENTS CONCERNS (CLIENT FEEDBACK)

1 Add an automatic Keydate to matter

Next End Task & Return Complete Workflow

I'm Posit, your virtual assistant! Please, tell me what you want to do...

A task which has been run can be undone by clicking the undo icon. (Note - this does not remove any letters, dossier entries or key dates which were filled/completed when the task was run, but simply resets the task so you can run it again).



Remove a workflow

You may remove workflows entirely if none of the tasks have been run, or once you have undone any which have.

Click Remove All, tick the workflow(s) to be removed and click Remove Selected.

Click OK to confirm.

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WORKFLOWS

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Search workflow task

Client Level Workflows

Send Feedback Request (Client Feedback)

Chase Response (Client Feedback)

Client Feedback Received (Client Feedback)

Respond to Clients Concerns (Client Feedback)

I'm Posit, your virtual assistant! Please, tell me what you want to do...