Osprey Approach: Running a Workflow (App)

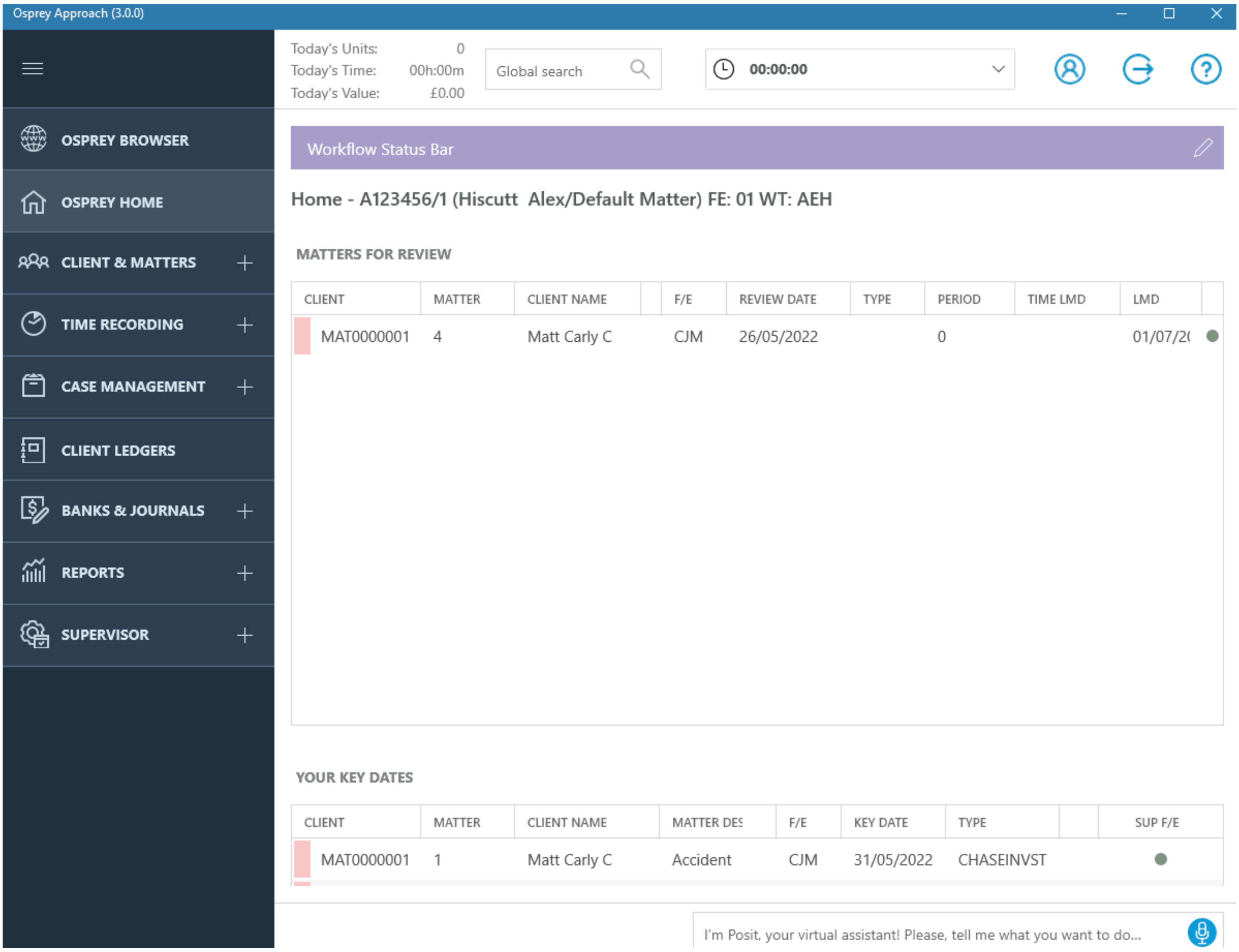
This help guide was last updated on
Dec 27th, 2023

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

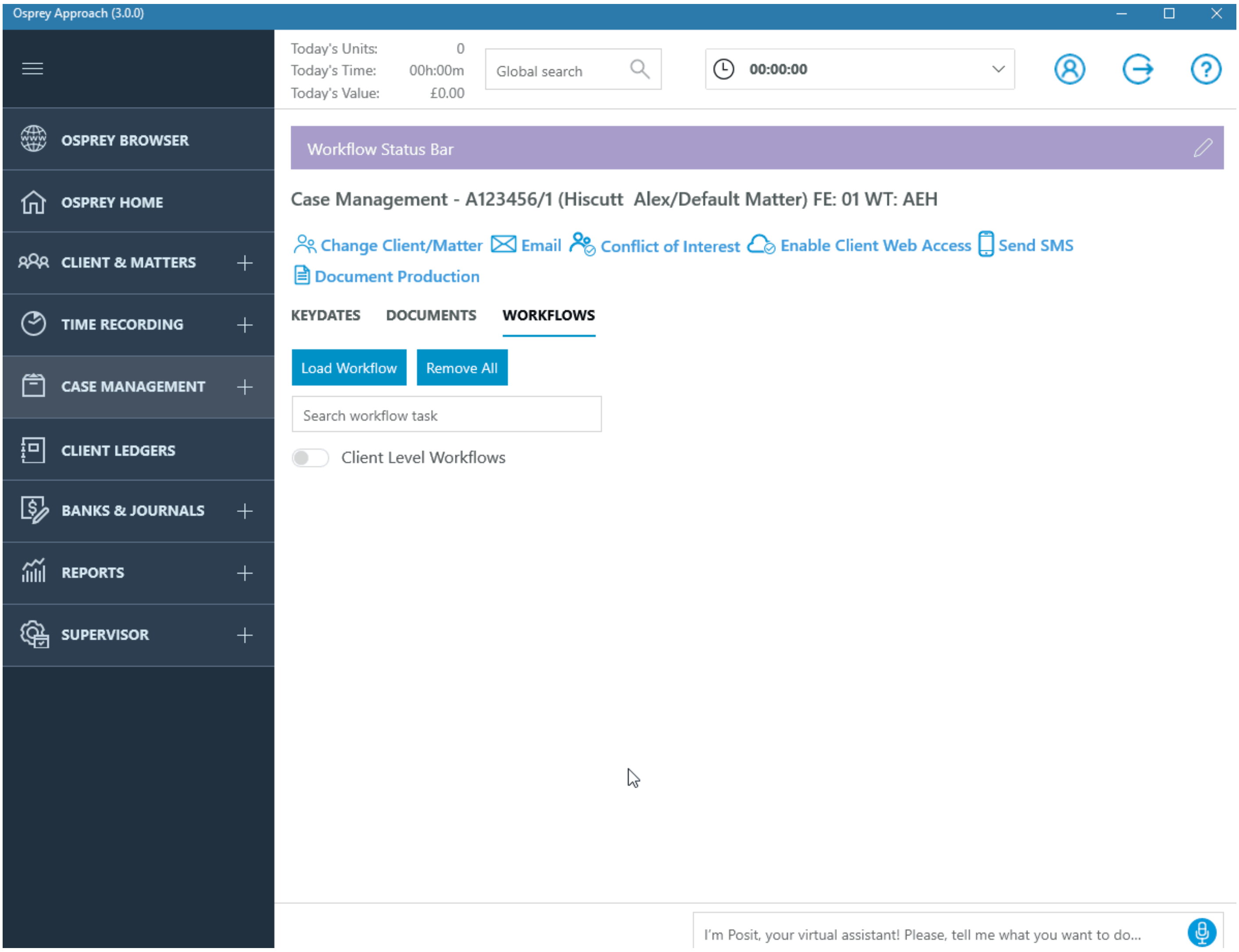
Workflows are made up of the tasks and actions required to complete a case from start to finish. Within each task can be a variety of automated actions. For example, sending letters and other documents to your clients, diarising key dates, and filling in questionnaires to capture client and matter information.

Load a workflow

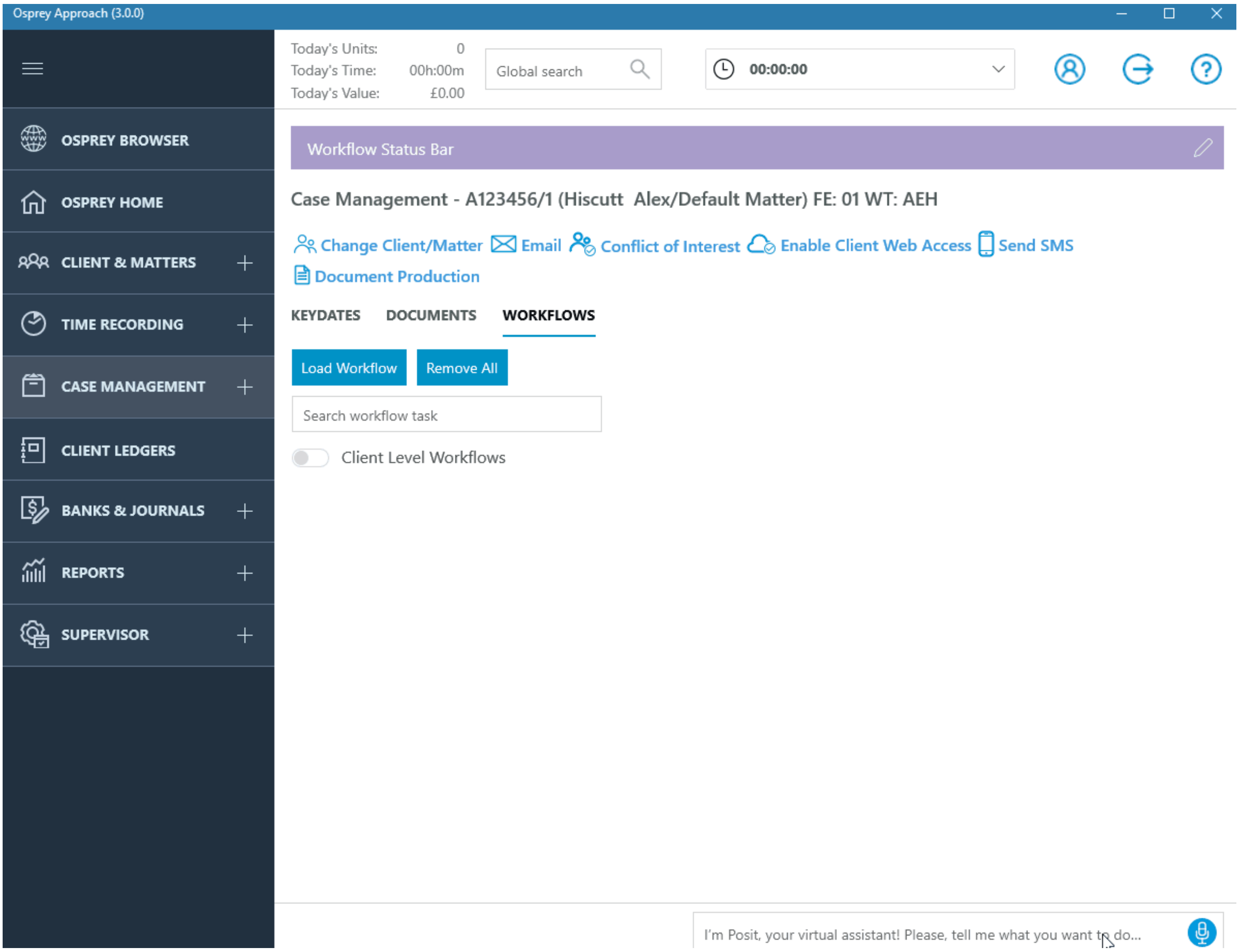
Within the Case Management menu select Workflows.



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.



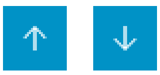
Once the correct workflow has been found click Load to add the workflow to the matter.



Run a workflow

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

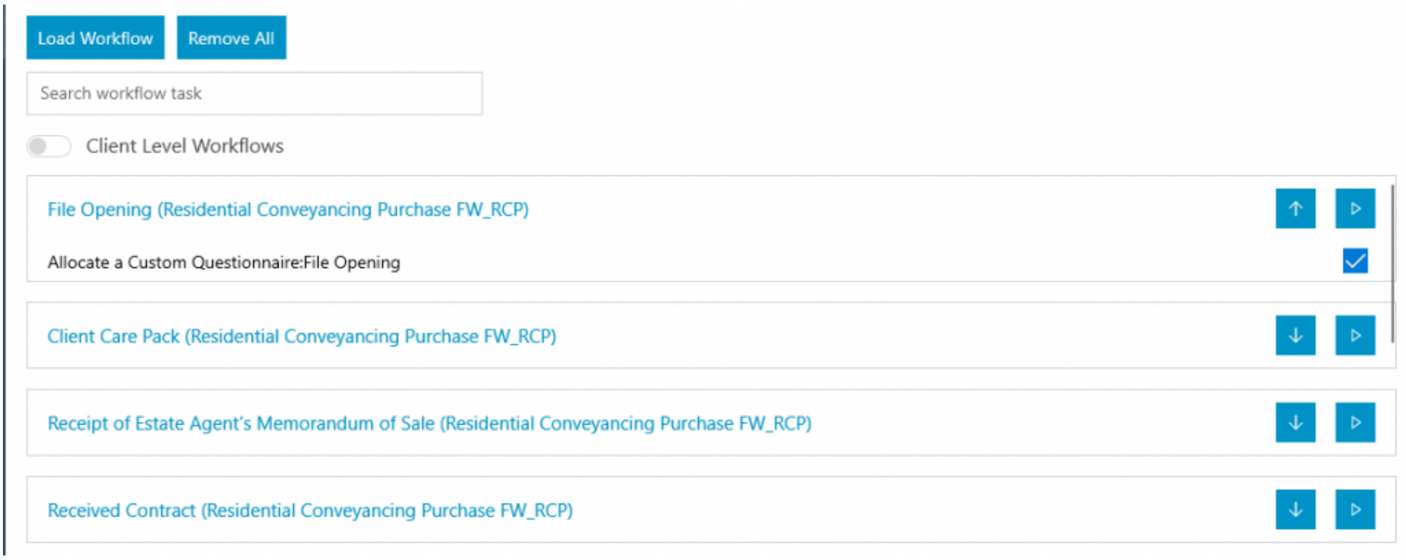
Each Task will have icons on the right hand side, the up/down arrow icon can be used to show or hide the actions list within the task.



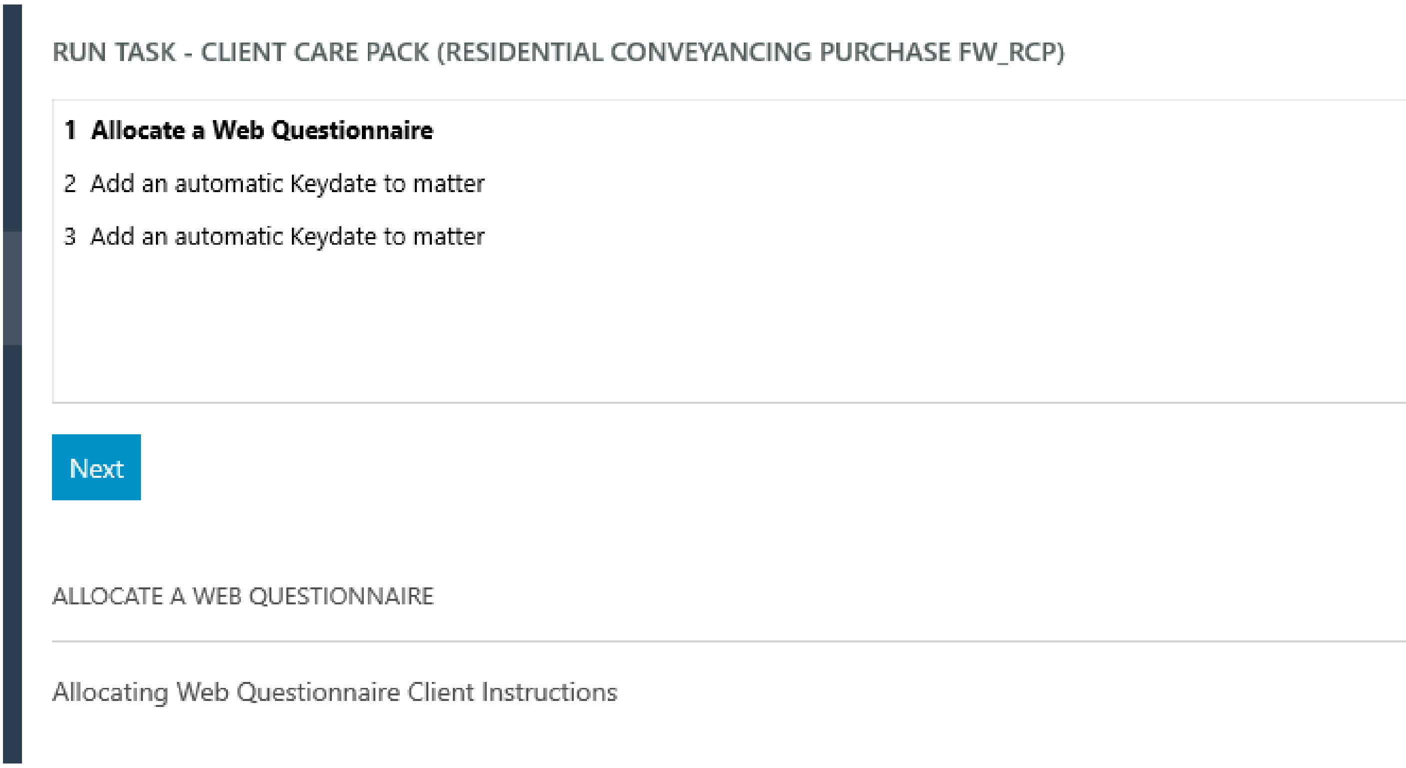
Show/Hide Actions icon

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

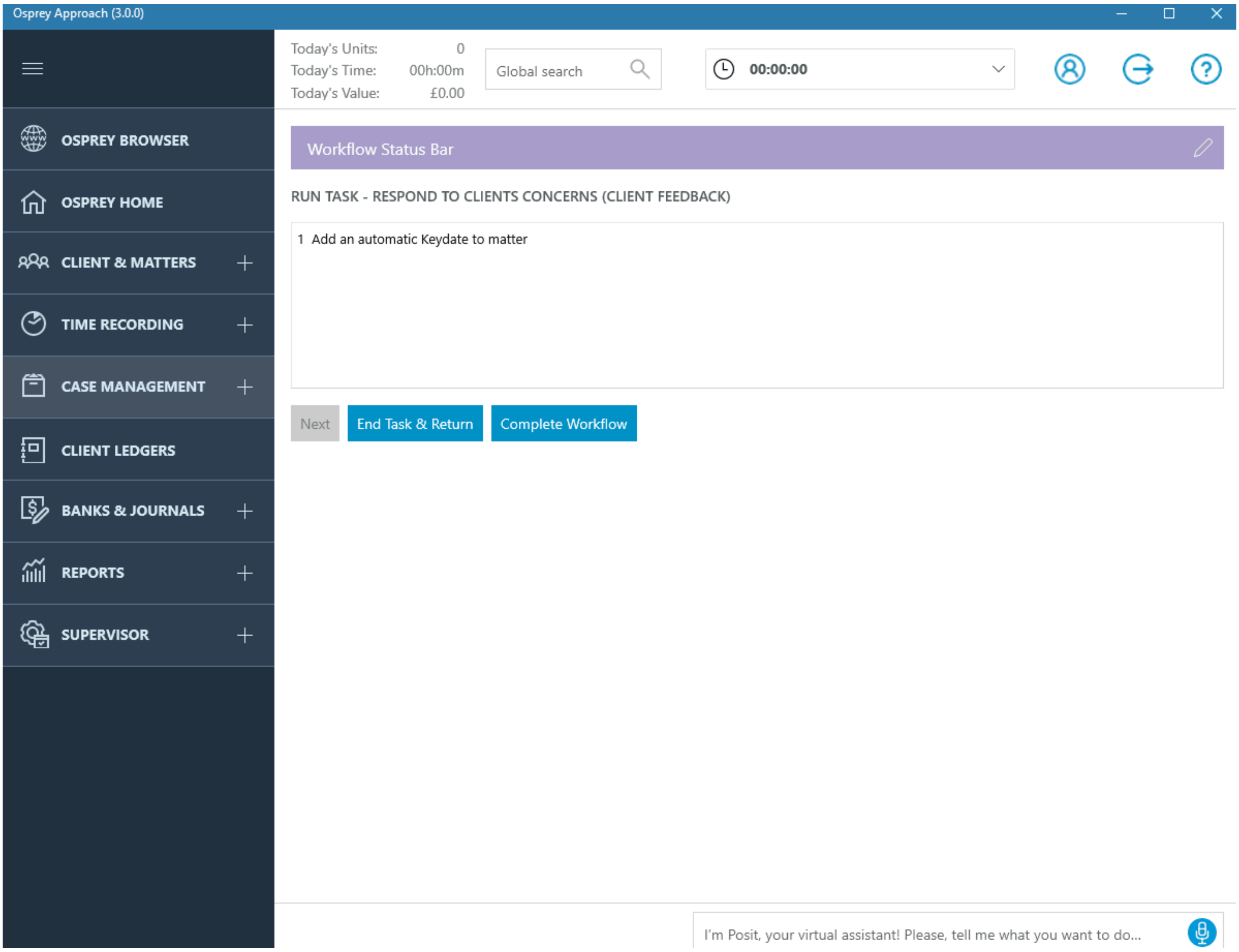
Run Workflow icon



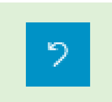
When running the task you can step through the actions by clicking Next.



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



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).

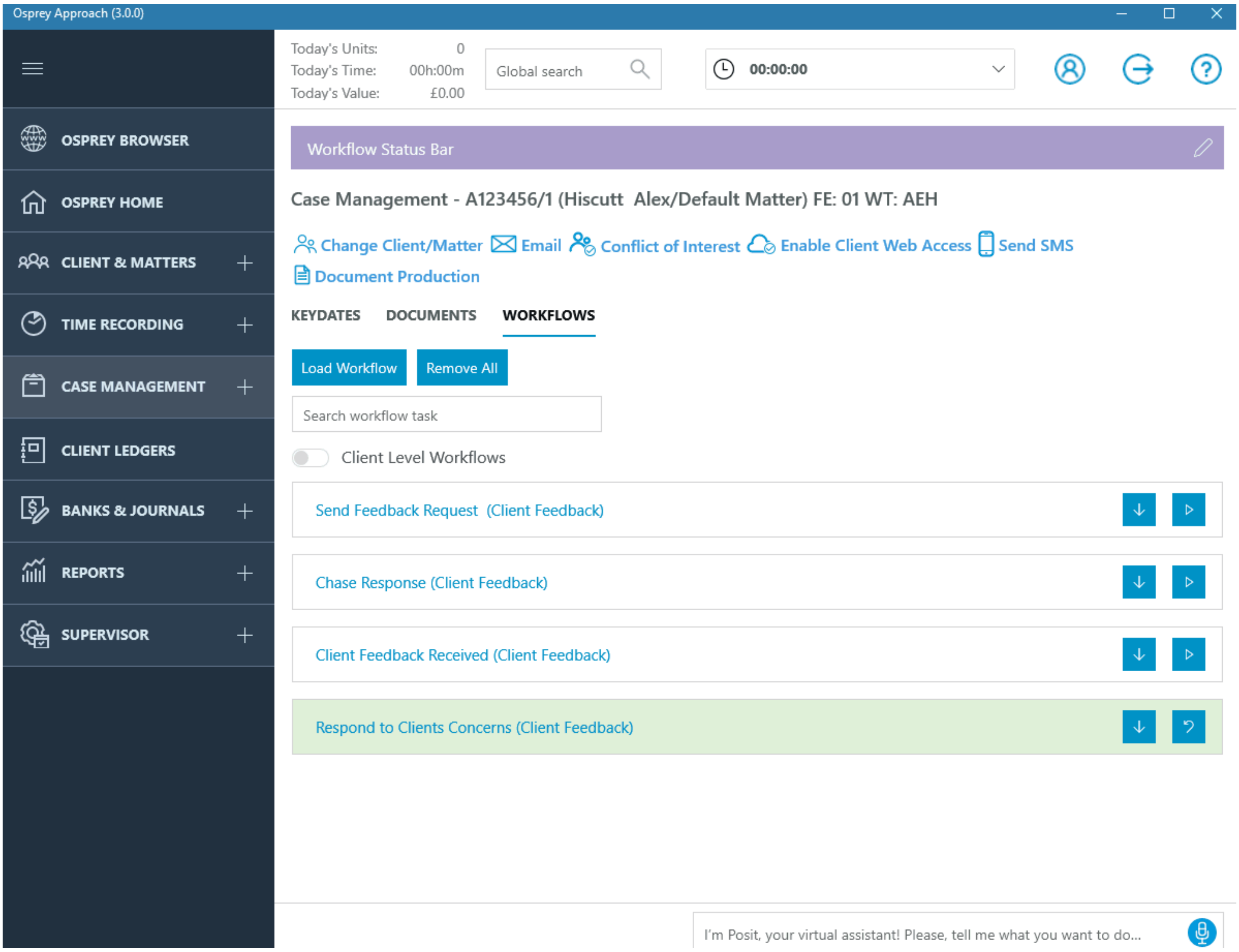


Remove a workflow

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.


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
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
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...