



Osprey Approach: Running a Workflow (Browser)

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Dec 22nd, 2022

The latest version is always online at
<https://support.ospreyapproach.com/?p=29998>



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.

The screenshot displays the Osprey Case Management interface. At the top, there is a blue header with the Osprey logo and 'Osprey Approach Test'. To the right of the logo, it shows 'Today's Units: 0', 'Today's Time: 00h:00m', and 'Today's Value: £0.00'. A 'Global search' bar is also present. Below the header, a breadcrumb trail indicates 'Clients & Matters > A123456/1 (Hiscutt Alex) FE:01 WT:AEH Default Matter'. A purple 'WORKFLOW STATUS BAR' contains 'Key Dates: Date: 14/12/2022 Description: Close File More Key Dates'. The 'CLIENT & MATTER SEARCH' section includes a 'Load Client/Matter' button and search fields for Client No. (A123456), Matter No. (1), Name (Hiscutt), and Matter (Default Matter). The 'MATTER DETAILS' section lists various fields: Branch (9: Aberdeen - userid: 04483785325), Dept (1: Civil Department), Fee Earner (S P Jennings), Supervising Fee Earner, Work Type (Alex H Test), Private Or Legal Aid (Private), Remuneration Type (Standard Remuneration), Debtor Limit (0.00), Disbursements Limit (0.00), WIP Limit (0.00), Date Opened (21/07/2022), Date Completed, Date Archived, Review Date, Review Type (None), and Review Period (0).

CLICK TO EXPAND

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.

Osprey Approach Test
Osprey Approach Test

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

N/A

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

WORKFLOW STATUS BAR

Key Dates: Date: 14/12/2022 Description: Close File More Key Dates

CLIENT & MATTER SEARCH

Client Search | Dossier Search | CRM Search | Send e-mail | Client Dossier | SMS

Client No: A123456
Matter No: 1
Name: Hiscutt
Matter: Default Matter

Load Client/Matter

WORKFLOW DETAILS

Load Workflow | Advanced | Remove All | Client Level Workflows

WORKFLOW TASKS

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

Osprey Approach Test

Today's Units: 0
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Global search

Case Management > Workflows

Back Export Include Global Search...

WORKFLOW ID	WORKFLOW DESCRIPTION	LOAD	VIEW
191	Alex H Test workflow	✓	🔍
360	Client Feedback	✓	🔍

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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.



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




You may also see a delete icon which will remove the task from the matter.

WORKFLOW DETAILS

 Load Workflow |  Advanced |  Remove All | Client Level Workflows

WORKFLOW TASKS

Send Feedback Request (Workflow:Client Feedback)  

- Allocate a Web Questionnaire
 - Client Feedback Questionnaire
 - Send merged email template
 - Email to Client asking to complete online Feedback Questionnaire
- Send Standard Document
 - Letter to Client enc Feedback Questionnaire
 - Send Standard Document
 - Client Feedback Questionnaire
- Add an automatic Keydate to matter
 - Send Standard Document
- BK Sup App Excel 1

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

Allocate a Web Questionnaire

Send merged email template

Send Standard Document

Send Standard Document

Add an automatic Keydate to matter

Send Standard Document



SEND STANDARD DOCUMENT



Running: Letter to Client enc Feedback Questionnaire



Next Action



When the last action has been run click Finish. Returning to the workflows screen you will see the task is now green and stamped with the date it was run.

WORKFLOW TASKS

Send Feedback Request (Workflow:Client Feedback)  

Chase Response (Workflow:Client Feedback)  

Client Feedback Received (Workflow:Client Feedback)  

Respond to Clients Concerns (Workflow:Client Feedback) Ticked 14/12/2022  

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.



Today's Units: 0
 Today's Time: 00h:00m
 Today's Value: £0.00

Global search

 N/A

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

WORKFLOW STATUS BAR

Key Dates: Date: 14/12/2022 Description: Close File More Key Dates

CLIENT & MATTER SEARCH

Client Search | Dossier Search | CRM Search | Send e-mail | Client Dossier | SMS

Client No:

Matter No:

Name:

Matter:

Load Client/Matter

WORKFLOW DETAILS

Load Workflow |
 Advanced |
 Remove All |
 Client Level Workflows

WORKFLOW TASKS

Send Feedback Request (Workflow:Client Feedback)	↑ ↓ >
Chase Response (Workflow:Client Feedback)	↑ ↓ >
Client Feedback Received (Workflow:Client Feedback)	↑ ↓ >
Respond to Clients Concerns (Workflow:Client Feedback) Ticked 14/12/2022	↑ ↓ ↶

CLICK TO ENLARGE