



Osprey Approach: Running a Workflow (Browser)

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Feb 29th, 2024

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, a blue header bar contains the Osprey logo, a sidebar menu with icons for various functions, and a top navigation bar with tabs for 'Clients & Matters' and 'A123456/1 (Hiscutt Alex) FE:01 WT:AEH Default Matter'. Below the header, a purple 'WORKFLOW STATUS BAR' shows 'Key Dates: Date: 14/12/2022 Description: Close File' and a 'More Key Dates' dropdown. The 'CLIENT & MATTER SEARCH' section includes a search bar and a 'Load Client/Matter' button. Below this, the 'MATTER DETAILS' section shows a form with fields for Branch, Dept, Fee Earning, Supervising Fee Earning, Work Type, Private Or Legal Aid, Remuneration Type, Debtor Limit, Disbursements Limit, WIP Limit, Date Opened, Date Completed, Date Archived, Review Date, Review Type, Review Period, and Email. The form is currently empty, and the 'Load Client/Matter' button is highlighted.

Osprey
Osprey Approach Test

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

Global search

Clients & Matters | 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

MATTER DETAILS

Add | Add Conveyancing File | Edit | Archive | Print

Branch: 9: Aberdeen - userid: 04483785325
Dept: 1: Civil Department
Fee Earning: S P Jennings
Supervising Fee Earning:
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 Review Period: 0
Email: Publishable:

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.

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:	<input type="text" value="A123456"/>	Load Client/Matter
Matter No:	<input type="text" value="1"/>	
Name:	<input type="text" value="Hiscutt"/>	
Matter:	<input type="text" value="Default 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
Today's Time: 00h:00m
Today's Value: £0.00

N/A

Case Management

Workflows

☐ Include Global

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.

