



# Osprey Approach: Running a Workflow (Browser)

This help guide was last updated on  
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 'Load Client/Matter' button and search fields for 'Client No.' (A123456), 'Matter No.' (1), 'Name' (Hiscutt), and 'Matter' (Default Matter). The 'MATTER DETAILS' section shows a form with fields for '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), and 'Review Period' (0). The 'Email' field is partially visible at the bottom.

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

Osprey  
Approach Test

N/A

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

WORKFLOW STATUS BAR

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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:

Load Client/Matter

Name:

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.



## 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.

