Osprey Approach: Adding a New Work Type (Browser)

This help guide was last updated on
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The latest version is always online at
https://support.ospreyapproach.com/?p=52506

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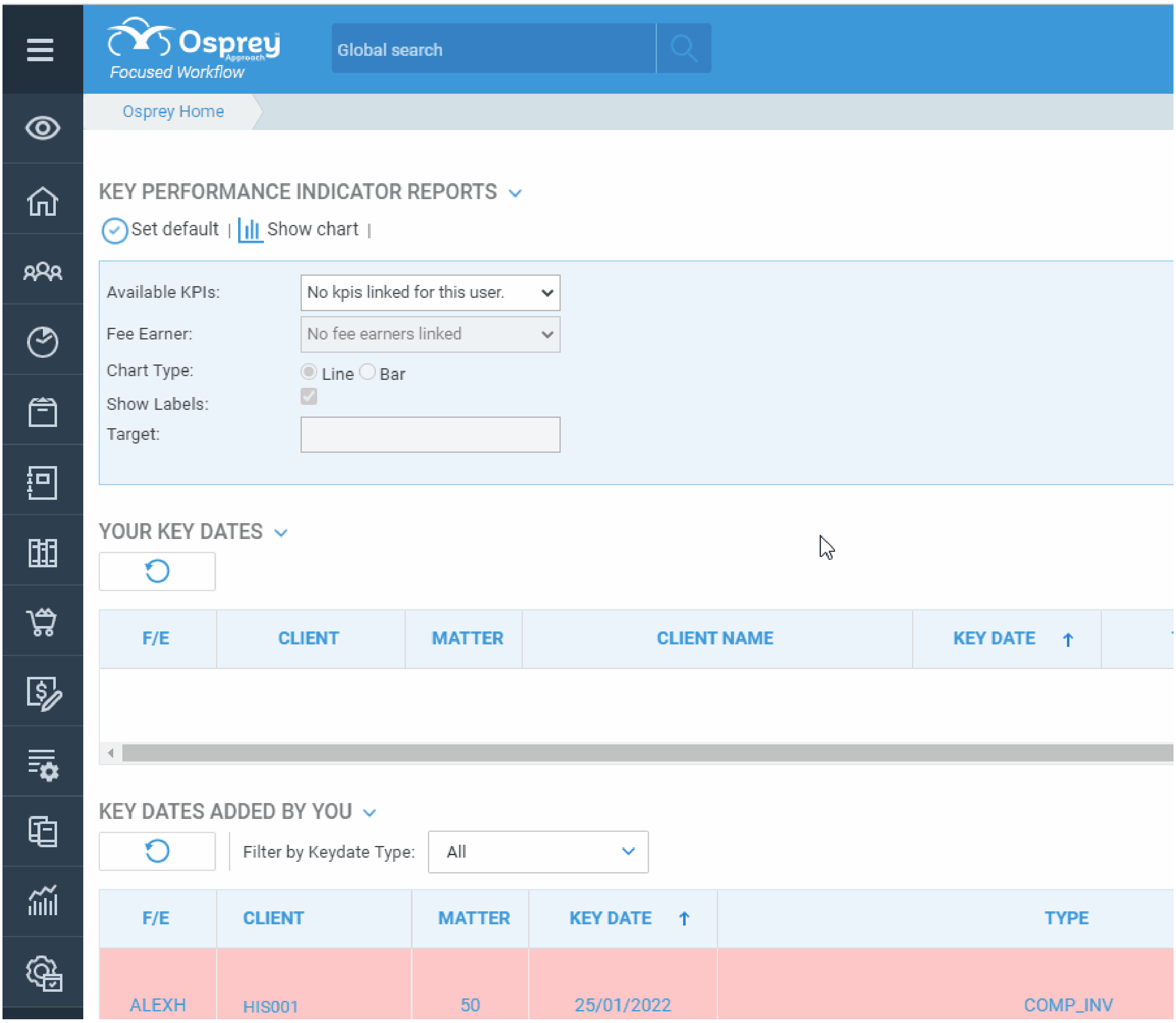
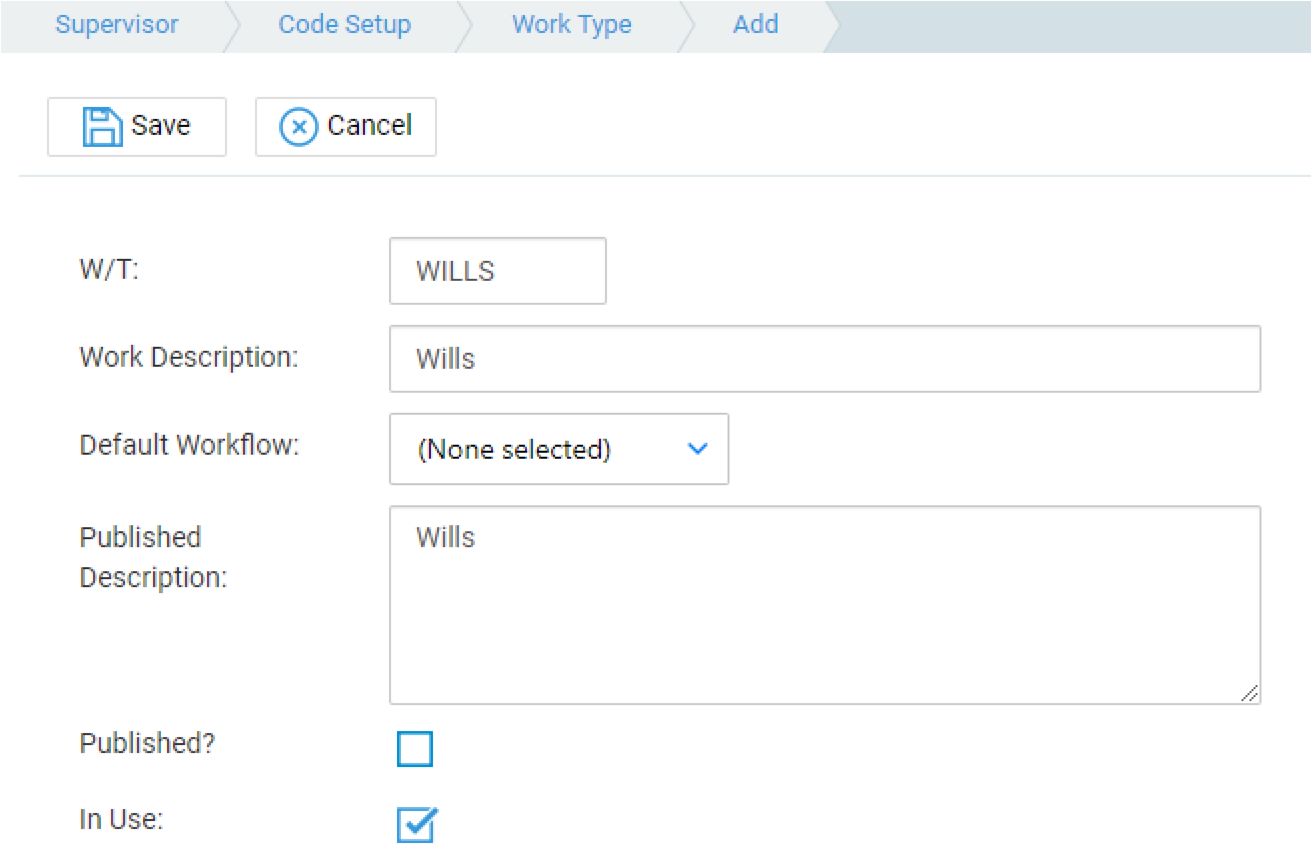
Work Types are used within Osprey to select which type of work is being carried out on behalf of your clients, and which documents, workflows, private time recording rates and correspondence are available for the user. Examples may include, Divroce, Crime, Conveyancing etc.

- Navigate to Supervisor > Code Setup > Work Types.
- If you need to add a new Work Type here, you may do so by clicking the New button :



- Enter an ID in the W/T box for your Work Type.
  This should have no spaces or special characters in (e.g. ?,.!% etc.)
- Enter a Description for your Work Type.
- If you have Workflows set up and would like to have a Workflow automatically loaded on adding a matter of this Work Type, select this in the Default Workflow box.
- If your clients log into the Osprey portal from your web site and you want them to be able to see the Workflow stages, enter a Published Description.
- If your clients log into the Osprey portal from your web site and you want them to be able to see the Workflow stages, tick the Published? box.
- Leave In Use ticked to be able to set up matters under this Work Type.



Any details other than the W/T ID can be amended at any point, by going into Supervisor > Code Setup > Work Type, right-click the relevant Work type and select Edit.

Setup Time Recording

To be able to time record on any new Work Types, Activity codes must be first linked the to Work Type. Please review the below guide for further information.

https://support.ospreyapproach.com/guides/set-up-private-time-recording/