

Osprey Approach: Adding a New Work Type (Browser)

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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 :

The screenshot displays the Osprey software interface. At the top, there is a blue header with the Osprey logo and a 'Global search' bar. Below the header, a sidebar on the left contains various navigation icons. The main content area is titled 'KEY PERFORMANCE INDICATOR REPORTS' and includes a 'Set default' button and a 'Show chart' button. Below these are several settings: 'Available KPIs' (No kpis linked for this user), 'Fee Earner' (No fee earners linked), 'Chart Type' (Line selected, Bar unselected), 'Show Labels' (checked), and 'Target' (empty input field). Below the KPI settings is a section titled 'YOUR KEY DATES' with a refresh button and an empty table with columns: F/E, CLIENT, MATTER, CLIENT NAME, KEY DATE (sorted ascending). Below that is a section titled 'KEY DATES ADDED BY YOU' with a refresh button, a 'Filter by Keydate Type' dropdown set to 'All', and a table with columns: F/E, CLIENT, MATTER, KEY DATE (sorted ascending), and TYPE. The table contains one entry: ALEXH, HIS001, 50, 25/01/2022, COMP_INV.

- 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.

 Save Cancel


W/T:

WILLS

Work Description:

Wills

Default Workflow:

(None selected) Published
Description:

Wills

Published?

In Use:

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/>