Osprey Approach: Create Custom Questionnaires

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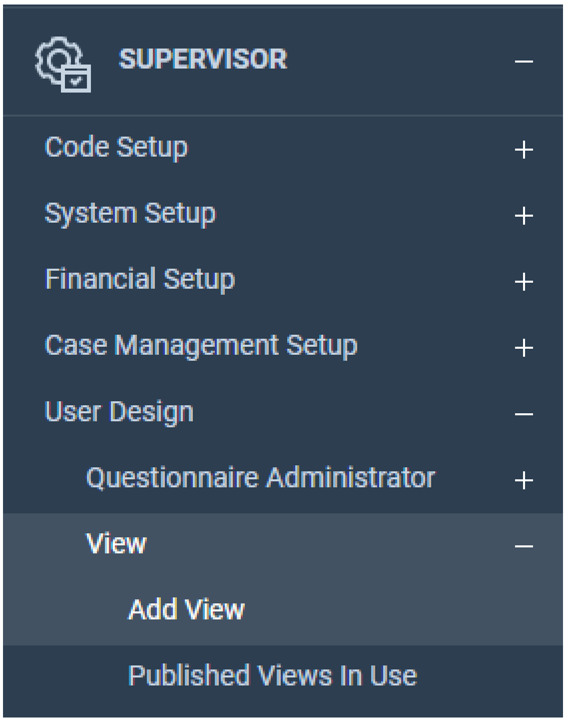
The latest version is always online at
https://support.ospreyapproach.com/?p=2019

You can set up custom questionnaires that allow you to view and amend a selection of matter dossier fields. These can be used in Workflows or standalone.

Navigate to the 'Supervisor' area within Osprey and select the 'User Design tab. Now select 'View' which will show you an additional option to 'Add View'.

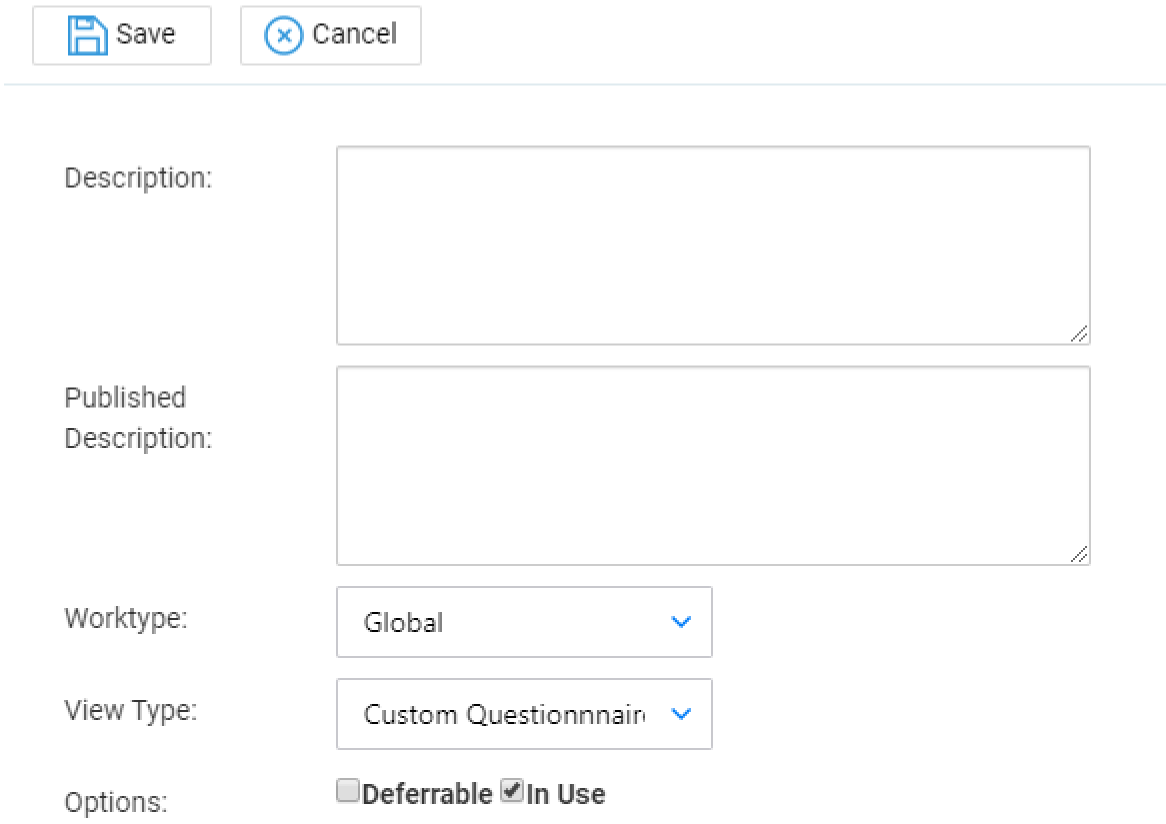


Select 'Add View' and the new screen will allow you to enter the new View 'Description' and 'Published Description' to be created.

Please note that the Published Description is only to be used if you have access to the client portal which will be the description shown to your client against this new view created.

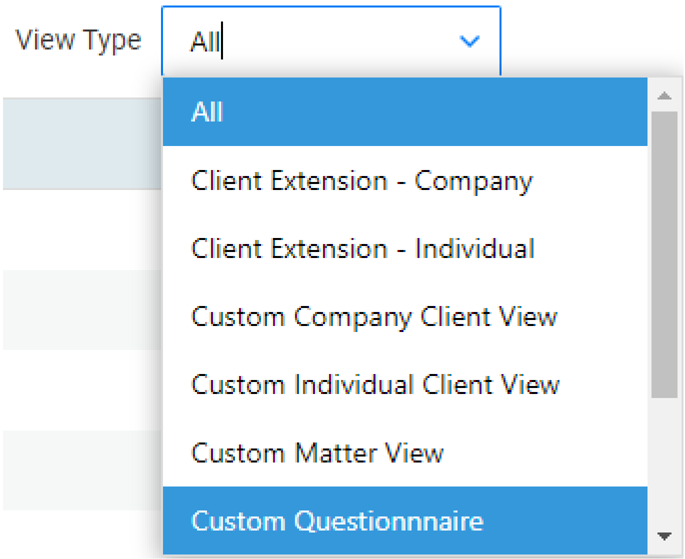
You will also have to select the 'Work type' and the 'View Type'. The 'Work Type' option will present you with a list of all your available 'Work Types' where you will need to select the relevant 'Work Type' you would like your Custom Questionnaire to be available under.

The 'View Type' option will show you a list of views available to create. In this case we are looking at the 'Custom Questionnaire' option shown. Fill in the details as appropriate and select 'Save'.



You will then be taken to the ‘Views’ area. There will be a filter option here to select your ‘View Type’.

Choose ‘Custom Questionnaire’ from this list to view all available questionnaires.



When you right click your new Questionnaire, you will a few options available:

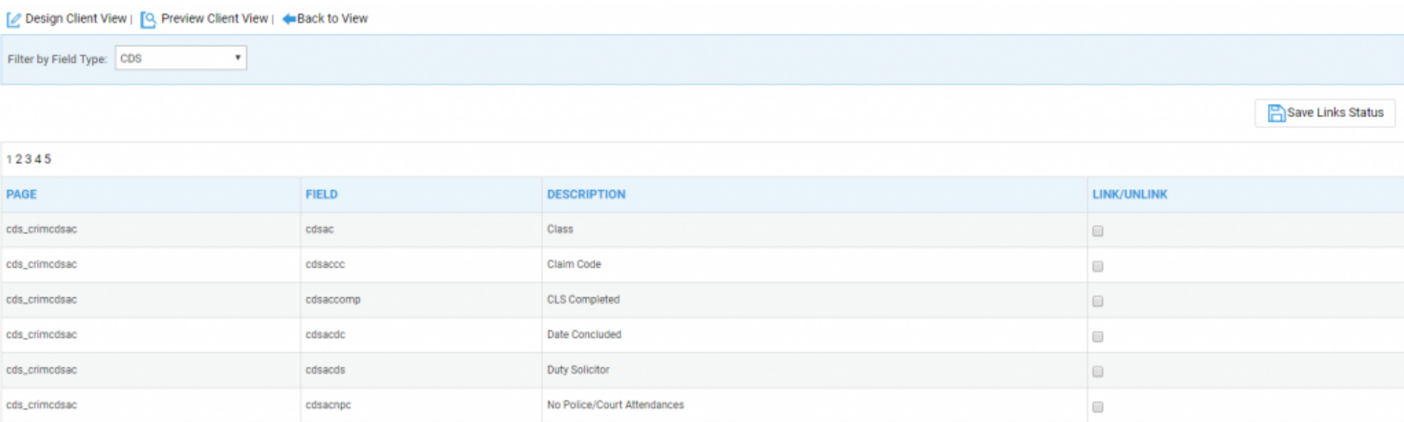
- The ‘Edit’ option will allow you to change the description and the work type of the questionnaire. However you will see that the ‘View Type’ has been greyed out so this is not able to be altered once saved.
- The ‘Delete’ option will allow you to delete the custom questionnaire created.
- ‘Clone’ will allow you to clone the questionnaire once fields have been linked. Please note that you will only be able to clone custom questionnaires for different work types where the same fields

linked are available for other work types.

- The 'Link' option will allow you to link any dossier fields created to be shown within this custom questionnaire.

Please note that you will only be able to link dossier fields that have been linked to dossier pages under the same work type the custom questionnaire has been created under. You are not limited within custom questionnaires to the amount of fields you can link

Once the 'Links' option has been selected the following screen will appear.

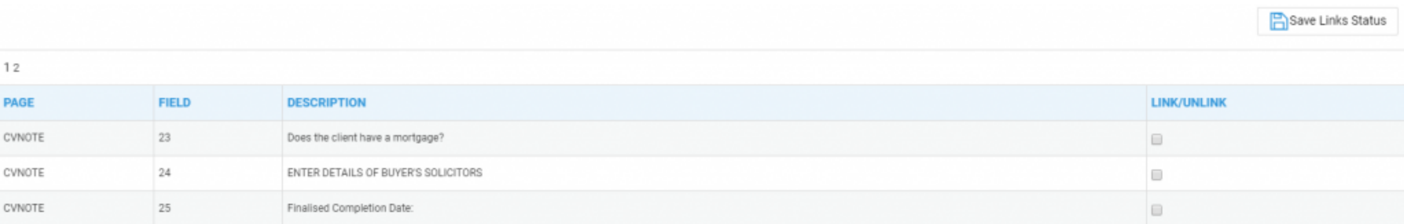


PAGE	FIELD	DESCRIPTION	LINK/UNLINK
cds_crimcdsac	cdsac	Class	
cds_crimcdsac	cdsaccc	Claim Code	
cds_crimcdsac	cdsaccomp	CLS Completed	
cds_crimcdsac	cdsacdc	Date Concluded	
cds_crimcdsac	cdsacds	Duty Solicitor	
cds_crimcdsac	cdsacnpc	No Police/Court Attendances	

You will be shown the option to 'Filter by Field Type' where you will see options for 'CDS', 'Client', 'Dossier' and 'Notes'.

- The 'CDS' option will show all fields available as standard under the criminal and civil billing.
- The 'Client' option shows you all standard fields available within osprey for client and matter details entered.
- The 'Dossier' option shows you all dossier fields/pages that have been setup under the work type the custom questionnaire has been created under.
- The 'Notes' option shows you any text notes which have been set up within supervisor. Once selected, you will be shown a new screen with all notes available where you can select the relevant notes to be linked to your new questionnaire. Adding Standard Text – Osprey Academy (pracctice.com)

In order to link the notes required, tick the relevant boxes and then select 'Save Links Status' shown to the top right hand side of the screen.



PAGE	FIELD	DESCRIPTION	LINK/UNLINK
CVNOTE	23	Does the client have a mortgage?	
CVNOTE	24	ENTER DETAILS OF BUYER'S SOLICITORS	
CVNOTE	25	Finalised Completion Date:	

Now select the 'Dossier' option available. Once this has been selected you will be shown a new screen with all dossier pages linked to the same work type as the new questionnaire has been created under. Questionnaires will allow you to use various fields from different pages available where you can select the relevant dossier fields to be linked to your new custom questionnaire.

In order to link the dossier fields required, tick the relevant box (or boxes). You may also make any fields compulsory if you wish. Select ‘Save Links Status’ once finished.

Save Links Status

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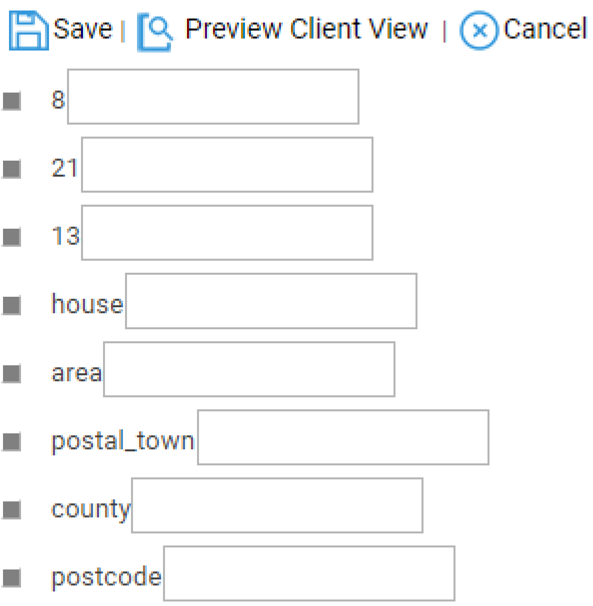
PAGE	FIELD	DESCRIPTION	LINK/UNLINK	COMPULSORY
TK_CLPERSONAL	RW_TEST	Name & Email	☑	☐
TK_CLPERSONAL	tk_CONFLICTCK	Conflict Check?	☑	☐
TK_CLPERSONAL	tk_FDESTDATE	File Destroy Date	☐	☐
TK_CLPERSONAL	tk_LAUNDER	Money laundering check carried out?	☐	☐
TK_CLPERSONAL	tk_MARITSTAT	Marital Status	☐	☐

Click ‘OK’ when prompted to save your changes.

You will see the option to ‘Design Client View’ once all relevant fields and notes have been linked.

Design Client View

Click this and a new screen will be shown displaying the available fields and notes linked.



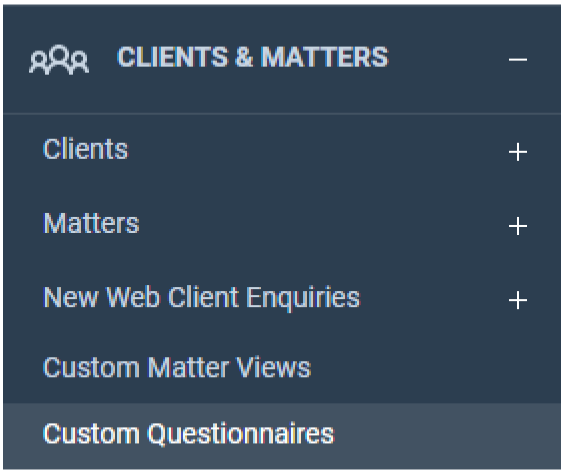
You will be able to drag and drop these into any order required by holding down the left-hand mouse button on the small grey box to the right of the fields and then dragging them to their new location.

Once fields and notes have positioned accordingly, select ‘Save’ to keep your changes.

You will then be given an option to ‘Preview Client View’ to see how your matter extension will look with full field descriptions rather than the field ID’s.

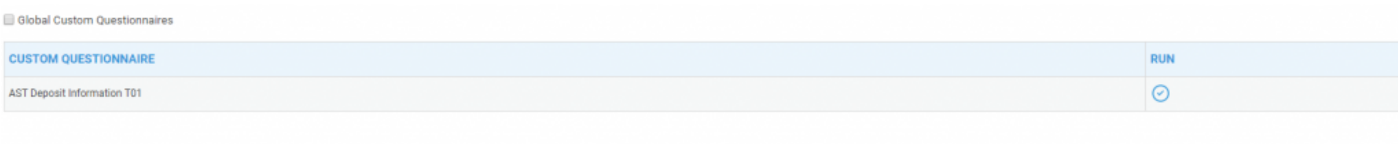
Preview Client View

Your new custom questionnaire will now be available under the ‘Clients & Matters’ tab.



Select this tab to open up your list of custom questionnaires available for the currently selected client.

You may tick the ‘Global’ box should you wish to access any questionnaires set as global.



Simply select the ‘Run’ icon to begin your custom questionnaire.