



Osprey Approach: Managing your Work Types

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The latest version is always online at
<https://support.ospreyapproach.com/?p=60272>

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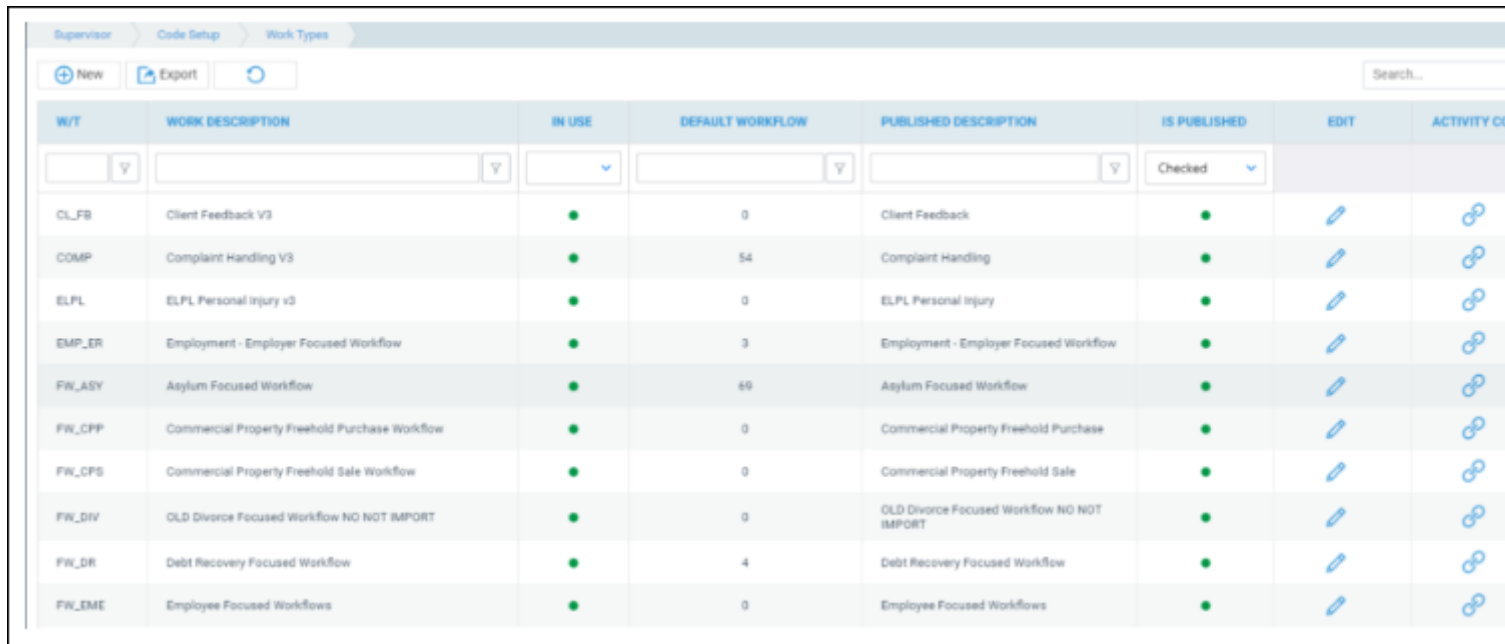


This guide will go through adding, amending and managing your Work Types in Osprey

Work Types dictate the area of law being carried out. This will also provide you with access to any documents, emails and workflows relevant to the file.

View your current Work Types

Navigate to Supervisor > Code Setup > Work Types. This will provide you with a list of all current and archived work types.



W/T	WORK DESCRIPTION	IN USE	DEFAULT WORKFLOW	PUBLISHED DESCRIPTION	IS PUBLISHED	EDIT	ACTIVITY CO
CL_FB	Client Feedback V3	●	0	Client Feedback	●		
COMP	Complaint Handling V3	●	54	Complaint Handling	●		
ELPL	ELPL Personal Injury v3	●	0	ELPL Personal Injury	●		
EMP_ER	Employment - Employer Focused Workflow	●	3	Employment - Employer Focused Workflow	●		
FW_ASY	Asylum Focused Workflow	●	69	Asylum Focused Workflow	●		
FW_CPP	Commercial Property Freehold Purchase Workflow	●	0	Commercial Property Freehold Purchase	●		
FW_CPS	Commercial Property Freehold Sale Workflow	●	0	Commercial Property Freehold Sale	●		
FW_DIV	OLD Divorce Focused Workflow NO NOT IMPORT	●	0	OLD Divorce Focused Workflow NO NOT IMPORT	●		
FW_DR	Debt Recovery Focused Workflow	●	4	Debt Recovery Focused Workflow	●		
FW_EME	Employee Focused Workflows	●	0	Employee Focused Workflows	●		

Adding a Work Type

To create a new Work Type, click New.

Save Cancel

W/T: CNH

Work Description: Conveyancing New Houses

Default Workflow: (None selected) ▾

Published Description: Conveyancing New Houses

Published?




In Use:

Work Type Folders:

- **W/T:** The Work type ID. This field can contain up to 6 characters.
- **Work Description:** A user-friendly description of the Work type
- **Default Workflow:** Select a workflow to be enabled by default.
- **Published Description:** This is the description visible to the client in the client Web Portal
- **Published?:** Matters assigned to this work type are available to be published to the web portal.
- **In Use:** Unticking this box will archive the work type, preventing matters being allocated to this area of work.

Amending a Work Type


Any details of the Work Type can be edited, with the exception of the Work Type ID. Select the Edit icon, or right-click on the relevant work type, and select Edit.


W/T	WORK DESCRIPTION	
CL_FB	Client Feedback V3	<div style="background-color: #0070c0; color: white; padding: 5px; text-align: center;">  Edit </div> <div style="background-color: white; padding: 5px; margin-top: 5px;">  Activity Code </div> <div style="background-color: white; padding: 5px; margin-top: 5px;">  Sub Category Link </div>
COMP	Complaint Handling V3	
ELPL	ELPL Personal Injury v3	
CMD_ED	Employment - Employer Focused Workflow	


From here, make any changes required, and click Save.

Removing a Work Type

You can archive any Work Type that does not have live matters allocated to it. Whilst on the edit screen, click the Archive button. A confirmation will appear.


 Save

 Cancel

 Archive

W/T: CNH

Work Description: Conveyancing New Houses

Default Workflow: (None selected) 

Published Description:

Conveyancing New Houses

Published?

In Use:

If there are any live matters present, a message will appear. To find any open matters, run a Live Matters report to show all live matters.

In Use:



You cannot set this worktype not in use as there are still live matters on it.