

Osprey Approach: Managing your Work Types

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



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.

Supervisor Code Setup Work Types								
New Export Refresh		Search...						
W/T	WORK DESCRIPTION	IN USE	DEFAULT WORKFLOW	PUBLISHED DESCRIPTION	IS PUBLISHED	EDIT	ACTIVITY CODE	SUB CATEGORY
					Checked			
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		60	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.


Supervisor

Code Setup

Work Type

Add

 Save

 Cancel


W/T:

CONVEY

Work Description:

Conveyancing

Default Workflow:

(None selected) 

Published Description:

Residential Conveyancing

Published?

☐

In Use:


☒



- **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	
<input type="text"/>	<input type="text"/>	<input type="text"/>
CL_FB	Client Feedback V3	
COMP	Complaint Handling V3	
ELPL	ELPL Personal Injury v3	
EMP_EF	Employment - Employer Focused Workflow	




 Edit

 Activity Code
  Sub Category Link

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.