

Osprey Approach: Setting up Questionnaire Administrators

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The latest version is always online at
<https://support.ospreyapproach.com/?p=63871>

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This guide will cover how to set up Questionnaire Administrators

When new enquires or web questionnaires are submitted by the client using the Osprey Web Portal, they are stored within a specific area for vetting before submitting into Osprey.

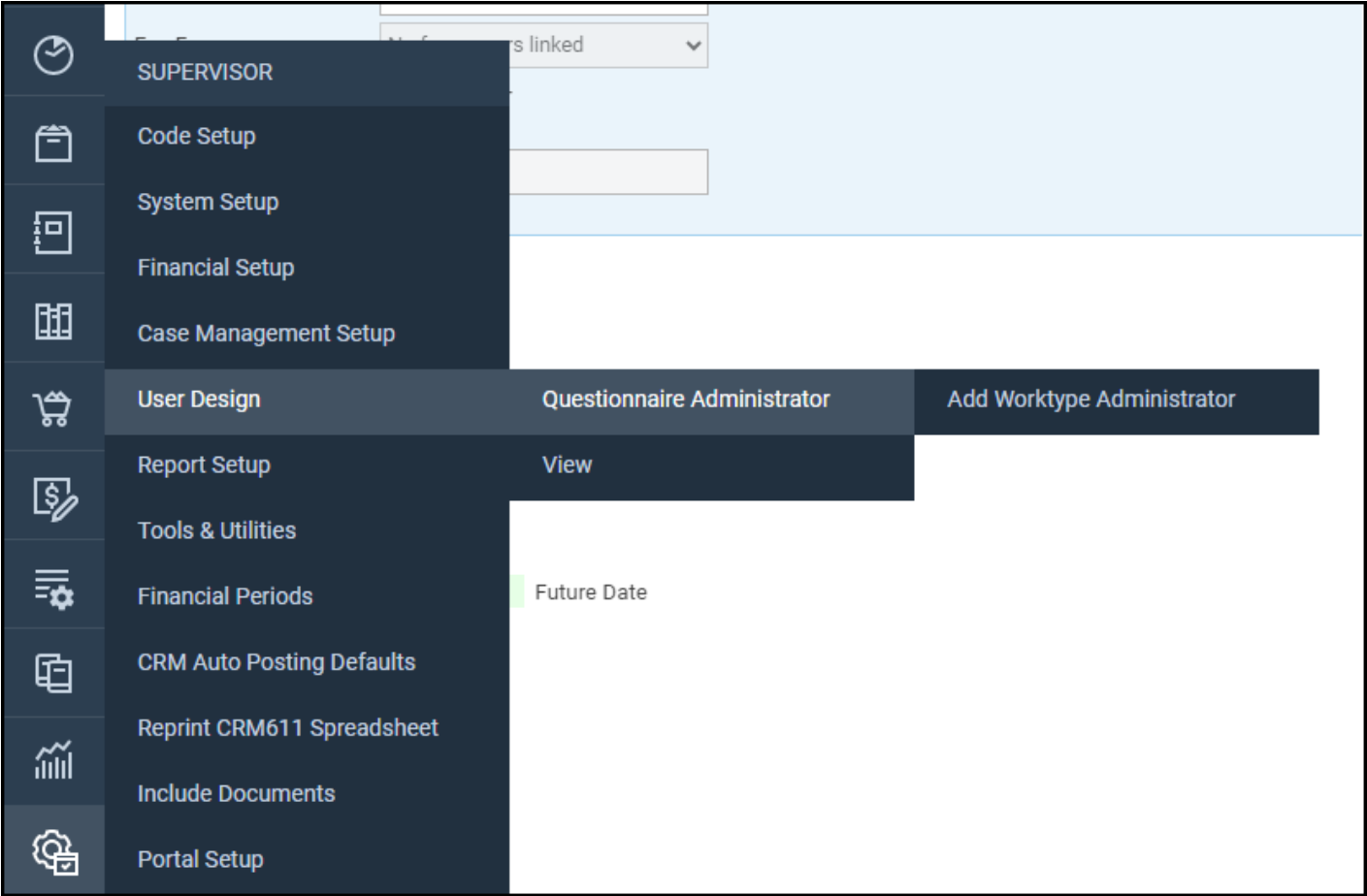
This helps ensure your Osprey system contains correct information, is in the correct format, and avoids illegitimate enquires from being stored, or specific information overwritten.

What are Questionnaire Administrators?

Depending on your firm's requirements, you can assign users to be able to vet the new enquires and questionnaires that are returned. These are set up on a work type basis, allowing you to assign specific users to be able to review enquires for certain areas of law.

Adding Questionnaire Administrators

To add a new Questionnaire Administrator, go to Supervisor > User Design > Questionnaire Administrator > Add Worktype Administrator



Select the Worktype, and the relevant user ID, and click Save

Supervisor

User Design

Questionnaire Administrator

Add

Save

Cancel

Worktype:

Residential Conveyancing I

User ID:

JAMES

Repeat for any other Users and Worktypes.

Users can be Questionnaire Administrators for more than one worktype, and more than one administrator can be linked to a worktype.

Supervisor

User Design

Questionnaire Administrator

Add Worktype Administrator

New

Export

Search...

WORK DESCRIPTION	USER ID
Residential Conveyancing Purchase Focused Workflow	NEIL
Residential Conveyancing Sale	NEIL
Residential Conveyancing Sale - Turnkey	MATTW
Residential Conveyancing Sale Focused Workflow	MITZI
Residential Conveyancing ToE/Remortgage FW	JAMES
Spec/low	MATTW
Transfer of equity	MIHAI
Wills Focused Workflow	DAN
Wills Focused Workflow	JENNIE

Amending Questionnaire Administrators

Right click on the relevant entry and click Edit. You can reassign the user to a new worktype, or replace the user with an alternative user.

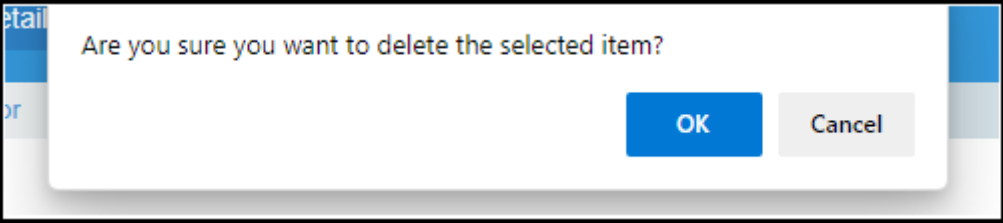
Residential Conveyancing Sale	NEIL
Residential Conveyancing Sale - Turnkey	MATTW
Residential Conveyancing Sale F	MITZI
Residential Conveyancing ToE/F	JAMES

Delete

Edit

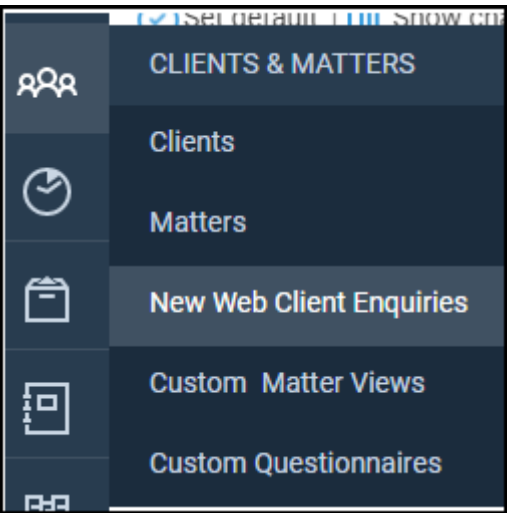
Deleting Questionnaire Administrators

Right click and select Delete. A confirmation box will appear confirming to delete the Work type Administrator.



Accessing New Web Client Enquiries

New Client Enquires can be accessed from Clients & Matters > New Web Client Enquires.



A list of any enquires, along with the work type, and total number of enquiries pending. Click View to view all enquires.

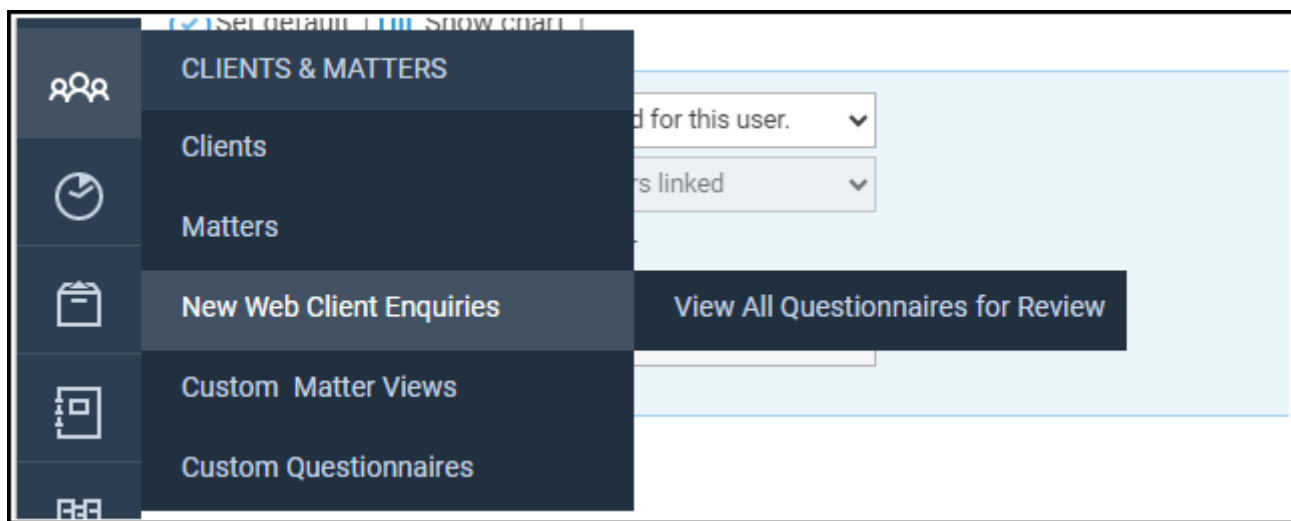
Clients & Matters > New Web Client Enquiries			
QUESTIONNAIRE	WORKTYPE	CASES PENDING	VIEW
CF Enquiry Form	ADMLAW	7	

Click Delete to remove the entry or click Convert to review and create as a new matter.

RECEIVED DETAILS												
CONVERT	DELETE	CLIENT_NO	MATTER_NO	CLNAME SURNAME	MATTER BRANCH_ID	MATTER DEPARTMENT_ID	MATTER FEE_EARNER_ID	ADMLAW ADMLAW_AGE	ADMLAW ADMLAW_CONTACT2	ADMLAW ADMLAW_PREVNAME	ADMLAW ADMLAW_STATUS	
		BUC00001	1	Buckley	1	1	ADAMB	21	Please select		Single	
		CL0020	6	y	1	1	01		Please select		Please Select...	
		DO0001	2	TEST	1	1	ADAMB		Please select		Single	
		KAN00001	1	Kanu	3	2	ADAMB	123	Please select		Please Select...	
		LET00001	1	Le Tissier	4	1	01	150	Email		Please Select...	
		NA0002	1	name	1	1	AG	nam	Please select	name	Single	
		NO0001	1	Noriel	1	1	ADAMB		Please select		Single	

Accessing Questionnaires for Review

New questionnaires can be accessed from Clients & Matters > New Web Client Enquires > View all Questionnaires for Review.



A list of all questionnaires, their work types and number of questionnaires will be visible. Click View.

FILTERS:			
User:	<input type="text" value="DAN"/>		
Questionnaire Type:	<input type="text" value="Pending Questionnaire"/>		
QUESTIONNAIRE	WORKTYPE	CASES PENDING	VIEW
Client Instructions	FW_RCP	1	

Each questionnaire can be deleted with the Delete option or click Post to review and post the information to the client's file.

Clients & Matters > New Web Client Enquiries > View All Questionnaires for Review											
Back											
Received Details											
POST	DELETE	CLIENT_NO	MATTER_NO	FW_RP_CLIENTDET FW_OCC1_ADD	FW_RP_CLIENTDET FW_OCC1_FORE	FW_RP_CLIENTDET FW_OCC1_SURN	FW_RP_CLIENTDET FW_OCC1_TITLE	FW_RP_LENDERS FW_H2B	FW_RP_LENDERS FW_H2B_AC	FW_RP_LENDERS FW_MTG1AC	FW_RP_LENDERS FW_MTG1END1
		B00002	1	Occ Address	Occ Forename	Occ Surname	Occ Title	0 NEW	345	123	MRTLGR55