Osprey Approach: Setting up Questionnaire Administrators

This help guide was last updated on
May 14th, 2024

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

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.

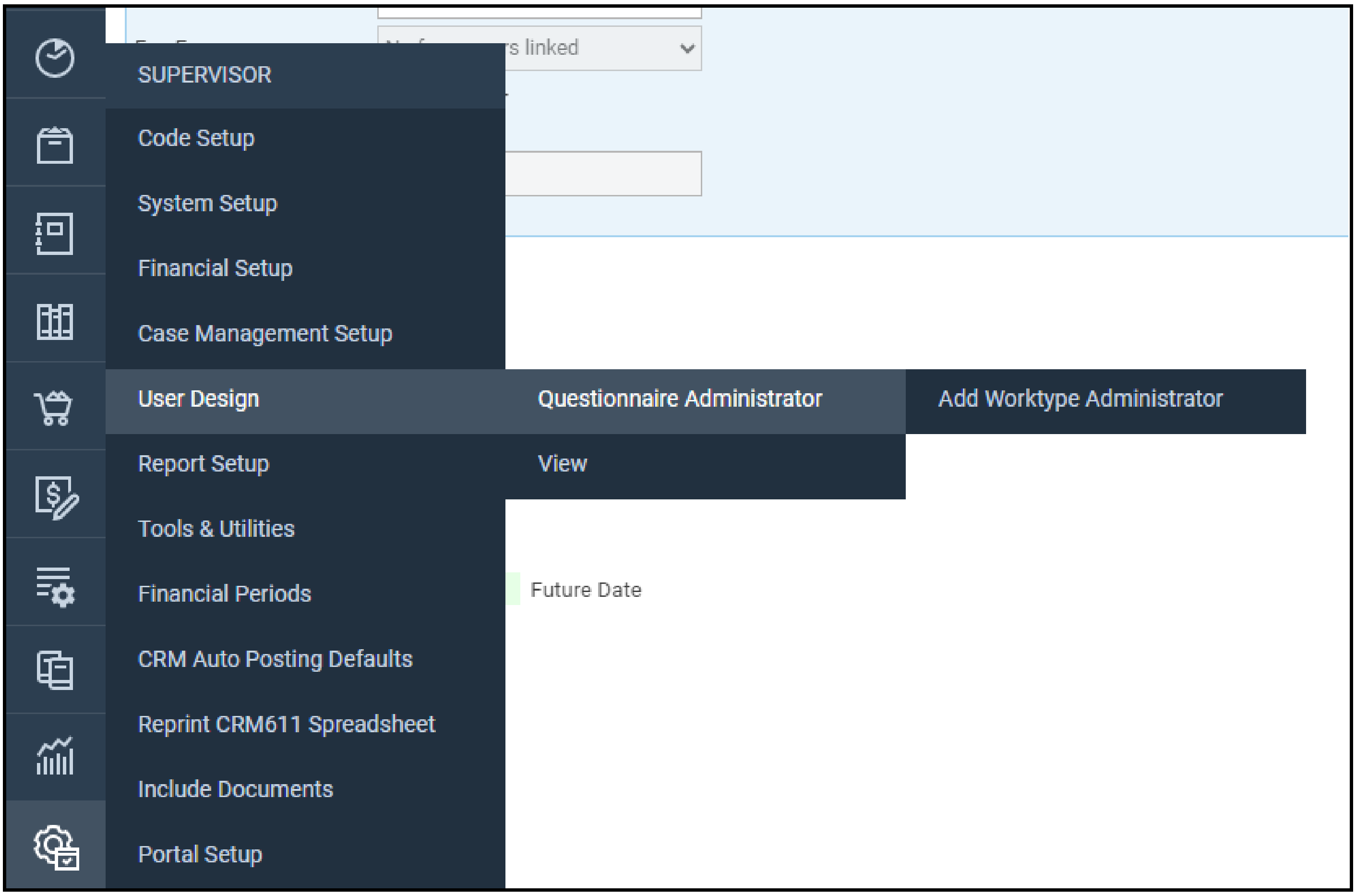
This helps ensure your Osprey system contains correct information, is in the correct format, and avoids illegitimate enquires from being stored, or specific information overwritten.

What are Questionnaire Administrators?

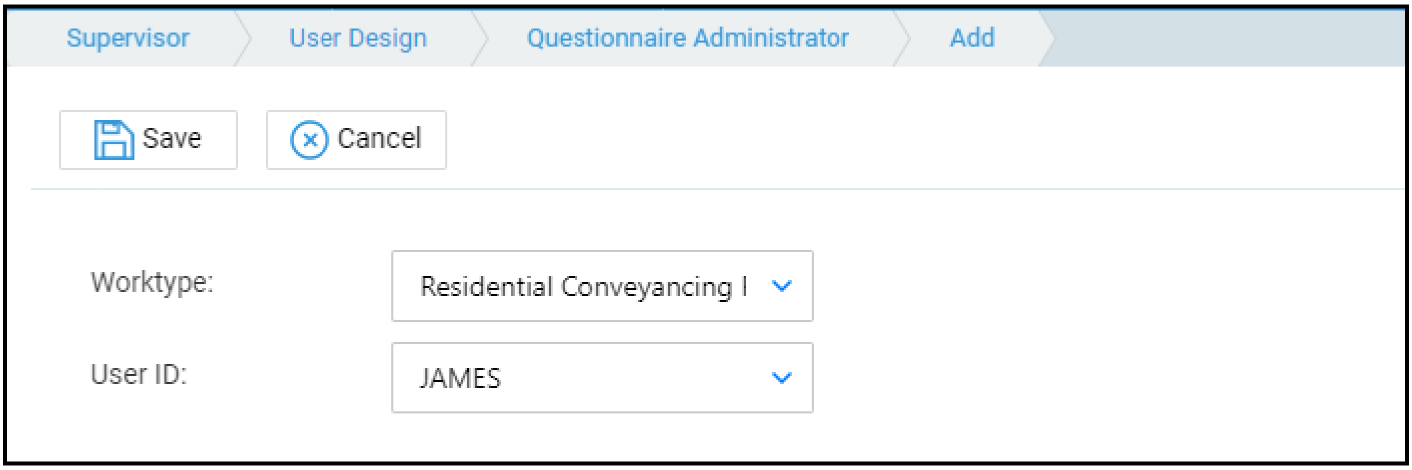
Depending on your firm's requirements, you can assign users to be able to vet the new enquires and questionnaires that are returned. These are set up on a work type basis, allowing you to assign specific users to be able to review enquires for certain areas of law.

Adding Questionnaire Administrators

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

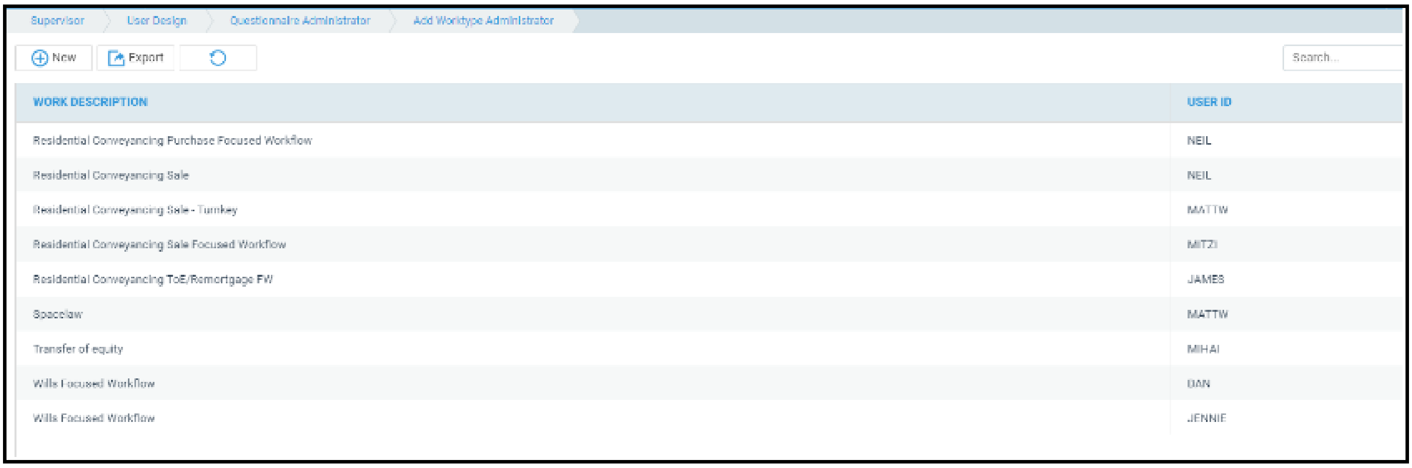


Select the Worktype, and the relevant user ID, and click Save



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.

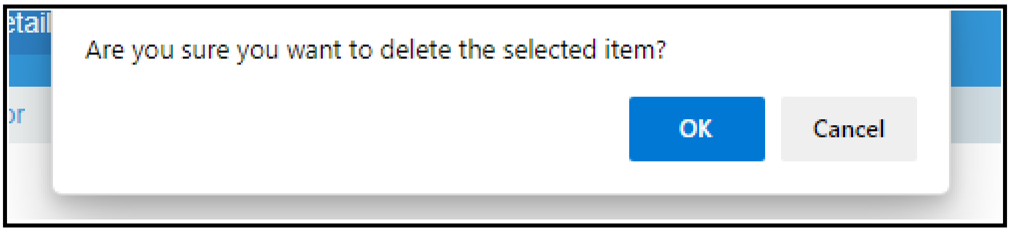


Amending Questionnaire Administrators

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.

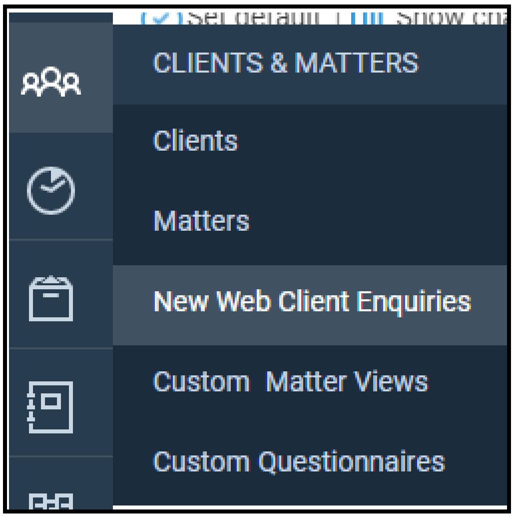
Deleting Questionnaire Administrators

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

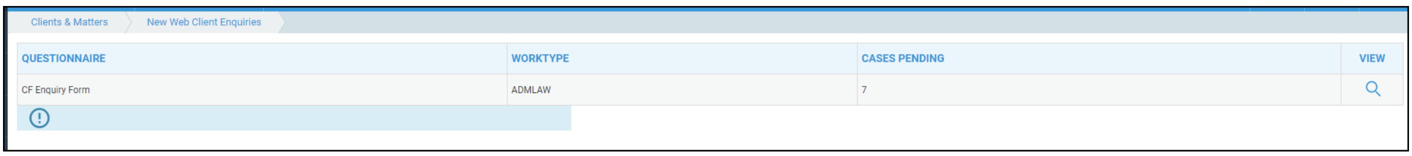


Accessing New Web Client Enquiries

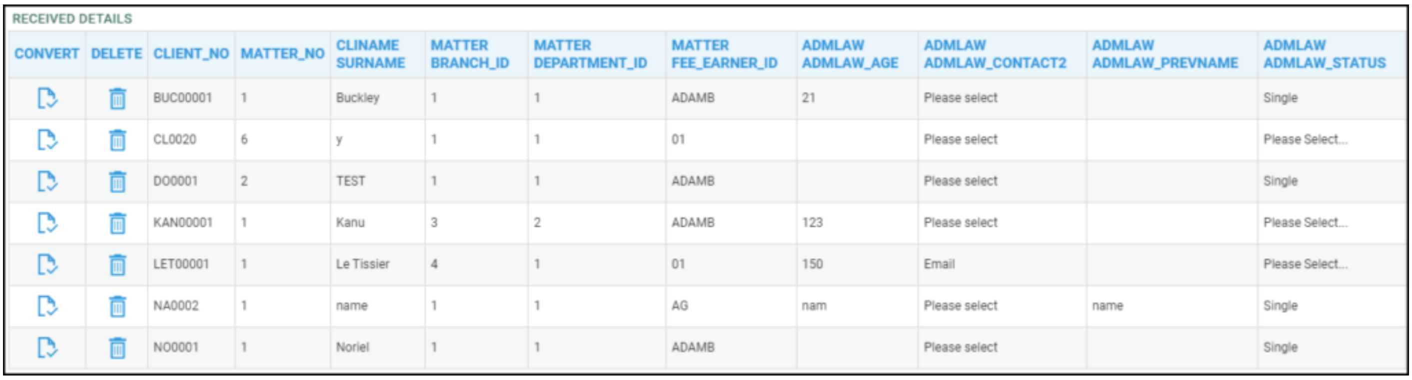
New Client Enquires can be accessed from Clients & Matters > New Web Client Enquires.



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



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

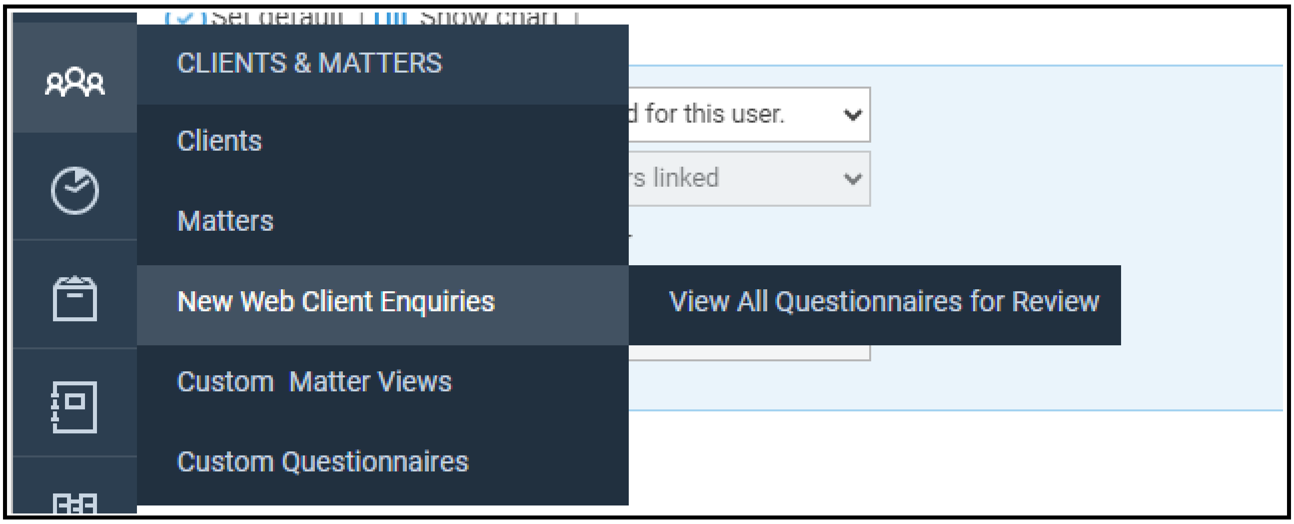


RECEIVED DETAILS

CONVERT	DELETE	CLIENT_NO	MATTER_NO	CLINAME 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...
		D00001	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
		N00001	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.

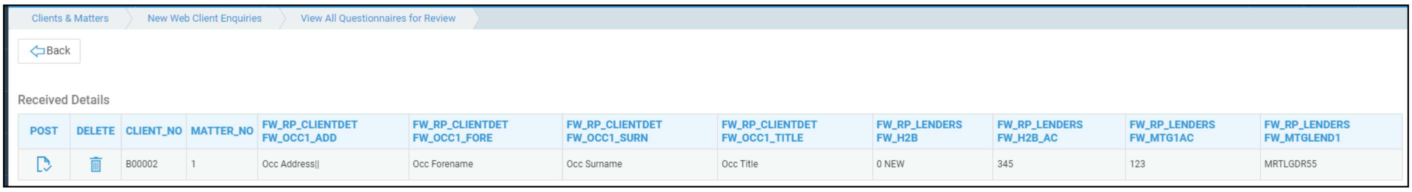
FILTERS:

User: DAN

Questionnaire Type: 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_MTGLEND1
		B00002	1	Occ Address||	Occ Forename	Occ Surname	Occ Title	0 NEW	345	123	MRTLGDR55