

# Osprey Approach: Setting up Questionnaire Administrators

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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

I	SUPERVISOR	s linked 🗸	
Ê	Code Setup		
Ð	System Setup		
	Financial Setup		
	Case Management Setup		
<b>}</b>	User Design	Questionnaire Administrator	Add Worktype Administrator
	Report Setup	View	
\$7		View	
	Tools & Utilities		
®∕ ∎		View Future Date	
	Tools & Utilities		
<b>₽</b>	Tools & Utilities Financial Periods		
₽	Tools & Utilities Financial Periods CRM Auto Posting Defaults		

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

Supervisor Us	er Design Question	nnaire Administrator	Add	
🖹 Save	Cancel			
Worktype:	Residential Conv	veyancing 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 Vuser Design Vuseformalite Administrator Add Worktype Administrator	
New Export	Search
WORK DESCRIPTION	USER ID
Residential Conveyancing Furchase Focused Workflow	NEIL
Residential Conveyancing Sale	NEIL
Residential Conveyencing Sale - Tumkey	MATTW
Residential Conveyancing Sale Focused Workflow	MITZI
Residential Conveyancing ToE/Remortgage FW	JAMES
Spacelaw	MATTW
Transfer of equity	MIHAI
Wills Focused Workflow	DAN
Wills Focused Workflow	JENNIE

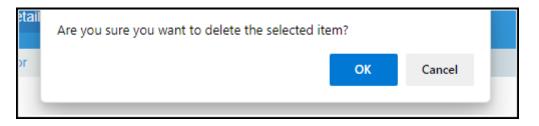
#### Amending Questionnaire Administrators

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 🖉 Edit	JAMES

## **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.

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	New Web Client Enquiries				
卽	Custom Matter Views				
	Custom Questionnaires				
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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	Q
0			

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
D		BUC00001	1	Buckley	1	1	ADAMB	21	Please select		Single
D		CL0020	6	у	1	1	01		Please select		Please Select
D		D00001	2	TEST	1	1	ADAMB		Please select		Single
D		KAN00001	1	Kanu	3	2	ADAMB	123	Please select		Please Select
D	Ō	LET00001	1	Le Tissier	4	1	01	150	Email		Please Select
D		NA0002	1	name	1	1	AG	nam	Please select	name	Single
D		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.

888	CLIENTS & MATTERS		
	Clients	d for this user.	<b>~</b>
I	Matters	rs linked	~
Ê	New Web Client Enquiries	View All Que	estionnaires for Review
ţ۵	Custom Matter Views		
	Custom Questionnaires		

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

FILTERS:			
User: DAN			
QUESTIONNAIRE	WORKTYPE	CASES PENDING	VIEW
Client Instructions	FW_RCP	1	Q
0			

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

Clients 8	Matters	New Wel	b Client Enquirie	s View All Questionnaires	for Review						
C Back											
Received	Details										
POST	DELETE	CLIENT_NO	MATTER_NO	FW_RP_CLIENTDET FW_OCC1_ADD		FW_RP_CLIENTDET FW_OCC1_SURN	FW_RP_CLIENTDET FW_OCC1_TITLE	FW_RP_LENDERS FW_H2B		FW_RP_LENDERS FW_MTG1AC	FW_RP_LENDERS FW_MTGLEND1
D	Ō	B00002	1	Occ Address	Occ Forename	Occ Surname	Occ Title	0 NEW	345	123	MRTLGDR55