

Osprey Approach: Linking fields to your Standard Documents

This help guide was last updated on Apr 11th, 2024

The latest version is always online at https://support.ospreyapproach.com/?p=16941



This guide explains how to link and unlink fields from your standard documents to include any information which you store within Osprey.

Linking Fields to Documents Using the Browser

Locating your document template

Navigate to Supervisor > Case Management Setup > Standard Documents. A list of all your available document templates will be displayed.

You can filter the list down using the options at the top left of the screen:

Document Type:	Standard	~
Filter by Work Type:	Residential Conveya	~
Filter by Expert Type:	(None)	~

Or, you can search for a specific template name using the search box in the top right corner:

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Linking fields to your document template

Right click on the document you wish to add fields to and select the Fields link button:

Document Type:	Standard 🗸	
Filter by Work Type:	Residential Conveya 💙	
Filter by Expert Type:	(None) 🗸	
WORK ID	DESCRIPTION	
TK_RCS	RCS Cli Completion Statement TK_RCS	A = 11
TK_RCS	RCS Cli Confirm Completion TK_RCS	C Edit
TK_RCS	RCS Completion Statement TK_RCS	E Fields
TK_RCS	RCS Sol Confirm Completion TK_RCS	E-mails
		£ Rate

Use the radio buttons to select from the following table types:

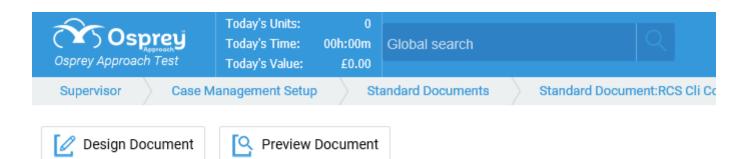
- Client contains all available tables relating to the client and matter
- Dossier contains all Matter specific dossier page tables linked to the work type of the letter template
- Formula contains all formula fields created under Supervisor > Case Management Setup > Formulae
- Client Dossier contains all Global or Client Level dossier tables
- Ask contains all Ask fields created under Supervisor > Case Management Setup > Formulae > Asks
- Include Document contains all header and footer include documents created under Supervisor > Include Documents
- CDS contains all fields relating to Contract Work forms under Case Management

Supervisor	Case N	lanagement Setup	Standard Documents	Standard Document:R			
🙋 Design De	ocument	Preview Docu	ument				

STANDARD DOCUMENT FIELDS

● Client ○ Dossier ○ Formula ○ Client Dossier ○ Ask ○ Include Document ○ CDS

Now choose from the available tables:



STANDARD DOCUMENT FIELDS

● Client ○ Dossier ○ Formula ○ Client Dossier ○ Ask ○ Include Document ○ CDS

Available Tables	ACCUSER	~		
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	CONTACT			
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	MATTER		•	
EMA	ORGANISATION	~	•	

Once you have selected the relevant table, the list of fields in this table will be displayed. Place a tick in the box alongside the fields you wish to link, and click Save.

MANAGE FIELDS

💾 Save

LINK/UNLINK	FIELD	LINKED? ↓
	MATTER_DESCRIPTION	•
	FEE_EARNER_ID	•
	WORK_ID	•
	WIP_LIMIT	•
	UNIQUE_FILE_NO	•

Select Design Document:

Supervisor	Case Ma	anagement Setup	Standard Documents	Standard Document:RCS
🖉 Design Do	ocument	Preview Doc	ument	

Word will open the document template:

Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»

Your Ref:

1 June 2020

& «CALCULATION_ADDRESS»

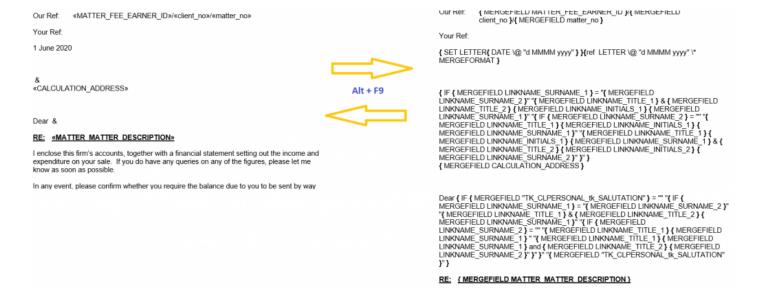
Dear &

RE: «MATTER MATTER DESCRIPTION»

I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

In any event, please confirm whether you require the balance due to you to be sent by way

You may toggle field codes on or off by holding down the Alt key and pressing F9:



To link a new field to the document, position your mouse cursor in the place you would like the new field to appear, and from the Mailings menu tab select Insert Merge Field:

Layout	References	Mailin	gs F	Review	View	Developer	Forms	Help	o Osprey	TM	Table I	Design	La	ayout							
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Once you have inserted all the required fields into the template, and made any text changes required, close Word using the red X in the top right hand corner, and save your changes:

https://test.ospreyapproach.com/?mode=1 - Save Dialog - Internet Explorer	_		×					
Your template is ready for upload. Press 'Save' to keep your changes or 'Cancel' to discard them.								
Save Cancel								

Removing linked fields from a document

To remove a field from a document, you must first ensure that the field has been removed from the template.

Right click on the document you wish to remove fields from and select the Fields link button:

Document Type:	Standard 🗸	
Filter by Work Type:	Residential Conveya 💉	
Filter by Expert Type:	(None) 🗸	
WORK ID	DESCRIPTION	
TK_RCS	RCS Cli Completion Statement TK_RCS	
TK_RCS	RCS Cli Confirm Completion TK_RCS	De Edit
TK_RCS	RCS Completion Statement TK_RCS	Pields
TK_RCS	RCS Sol Confirm Completion TK_RCS	E-mails
		£ Rate

Select Design Document:



Case Management Setup



Q Preview Document

Word will open the document template:

Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»

Your Ref:

1 June 2020

& «CALCULATION_ADDRESS»

Dear &

RE: «MATTER MATTER DESCRIPTION»

I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

In any event, please confirm whether you require the balance due to you to be sent by way

Select the field you want to remove and delete it from the template. If you are unable to see the field, you may toggle field codes on or off by holding down the Alt key and pressing F9:

Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»	OULKET: { MERGEFIELD MATTER_FEE_EARMER_ID }{ MERGEFIELD matter_no }{ MERGEFIELD matter_no }
Your Ref:	Your Ref:
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Dear &	LINKNAME_SURNÄME_1)" "{
RE: «MATTER MATTER DESCRIPTION»	MERGEFIELD LINKNAME_SURNAME_1 }" { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 } & {
I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.	MERGEFIELD LINKNAME_TITLE_2}{MERGEFIELD LINKNAME_INITIALS_2} MERGEFIELD LINKNAME_SURNAME_2}'} {MERGEFIELD CALCULATION_ADDRESS}
In any event, please confirm whether you require the balance due to you to be sent by way	
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	RE: { MERGEFIELD MATTER MATTER DESCRIPTION }

Once you have deleted the field from the template, and made any text changes required, close Word using the red X in the top right hand corner, and save your changes:

https://test.ospreyapproach.com/?mode=1 - Save Dialog - Internet Explorer	_		×					
Your template is ready for upload. Press 'Save' to keep your changes or 'Cancel' to discard them.								
Save Cancel								

To unlink the field you have removed from the template, select the relevant Standard Document Fields radio button and Available Table, place a tick in the Link/Unlink box, and click Save:

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Available Tables	LINKNAME	
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LINK/UNLINK	FIELD	LINKED? ↓
	TITLE_2	•
	TITLE_1	•
	SURNAME_2	•
Linking Fie	lds to Documents Using the	e Case

Management App

Locating your document template

Navigate to Supervisor > Case Management Setup > Standard Documents. A list of all your available document templates will be displayed.

You can filter the list down using the options at the top left of the screen

Standard Documents

+ Add Standard I	Document	+ Add Current Document	
Filter by:			
Document Type:	Standard		~
Work Type:	ALL		×
Expert Type:	None		~

Or, you can search for a specific template name using the search box in the top right corner:

Standard Docu	uments				
+ Add Standard	Document + Add Current Document				
Filter by:					
Document Type:	Standard V				
Work Type:	ALL				
Expert Type:	None			Search	0
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FWRCP .	_1 doc from browser			N	N
FWRCP .	_doc from App			N	N

Linking fields to your document template

Right click on the document you wish to add fields to and select the Fields link button

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	GLOBAL	AAATest					N	N	
TIME RECORDING +	COMP	Acknowledgement of Complaint					N	N	
CASE MANAGEMENT +	GLOBAL	Ad Hoc letter to any Contact	Edit				N	N	
	ADMLAW	Adam Buckley BHB test	Fields				N	N	
	GLOBAL	Address					N	N	
BANKS & JOURNALS +	AEH	Address 5 test					N	N	
	MH_WT1	Address field					N	N	
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	CIVW1	0001 Civil Current Document			Accountant		N	N	
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abel Templates	GLOBAL	001 - Standard letter WEB					N	N	
Cheque Templates	CONSAL	001 - Test Address 3					N	N	

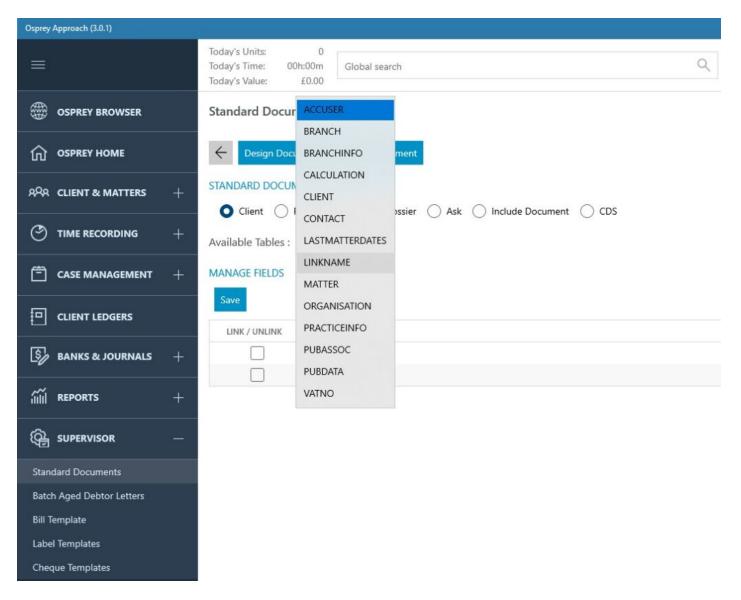
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- CDS contains all fields relating to Contract Work forms under Case Management

STANDARD DOCUMENT FIELDS



Now select the relevant table



Once you have selected the relevant table, the list of fields in this table will be displayed. Place a tick in the box alongside the fields you wish to link, and click Save.

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Word will open the document template:

Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»

Your Ref:

1 June 2020

& «CALCULATION_ADDRESS»

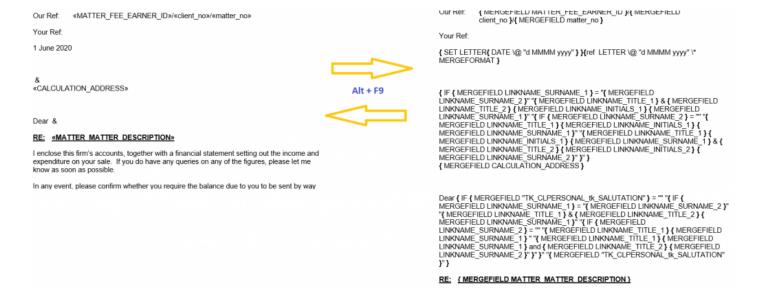
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				ma	tter_no															
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				CA	LCULAT	ION_FEE_EARNE	R_DESCRIP	TION												
				CA	LCULAT	ION_FEE_EARNE	R_EMAIL													
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Once you have inserted all the required fields into the template, and made any text changes required, close Word using the red X in the top right hand corner, and save your changes

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Removing Linked Fields from a Document

To remove linked fields from a document, you will need to click "Design" on the document so that it is open in Word and then delete the field. Once this has been done you will be able to untick the field from the field linking screen and clicking Save.