Osprey Approach: Linking fields to your Standard Documents

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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:

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

Linking fields to your document template

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

WORK ID	DESCRIPTION	
TK_RCS	RCS Cli **Completion** Statement TK_RCS	
TK_RCS	RCS Cli Confirm **Completion** TK_RCS	
TK_RCS	RCS **Completion** Statement TK_RCS	
TK_RCS	RCS Sol Confirm **Completion** TK_RCS	

Document Type: Standard

Filter by Work Type: Residential Conveya

Filter by Expert Type: (None)

Edit

Fields

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 Management Setup > Standard Documents > Standard Document:R

Design Document   Preview Document

STANDARD DOCUMENT FIELDS

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

Now choose from the available tables:

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 Management Setup ＞ Standard Documents ＞ Standard Document:RCS

✎ Design Document   🔍 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

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

Alt + 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:

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:

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:

Select Design Document:

✎ **Design Document**   🔍 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»

Your Ref:

1 June 2020

&
«CALCULATION_ADDRESS»

Dear &

RE: «MATTER_MATTER_DESCRIPTION»

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

Alt + F9

Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no }

Your Ref:

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d MMMM yyyy" * MERGEFORMAT }
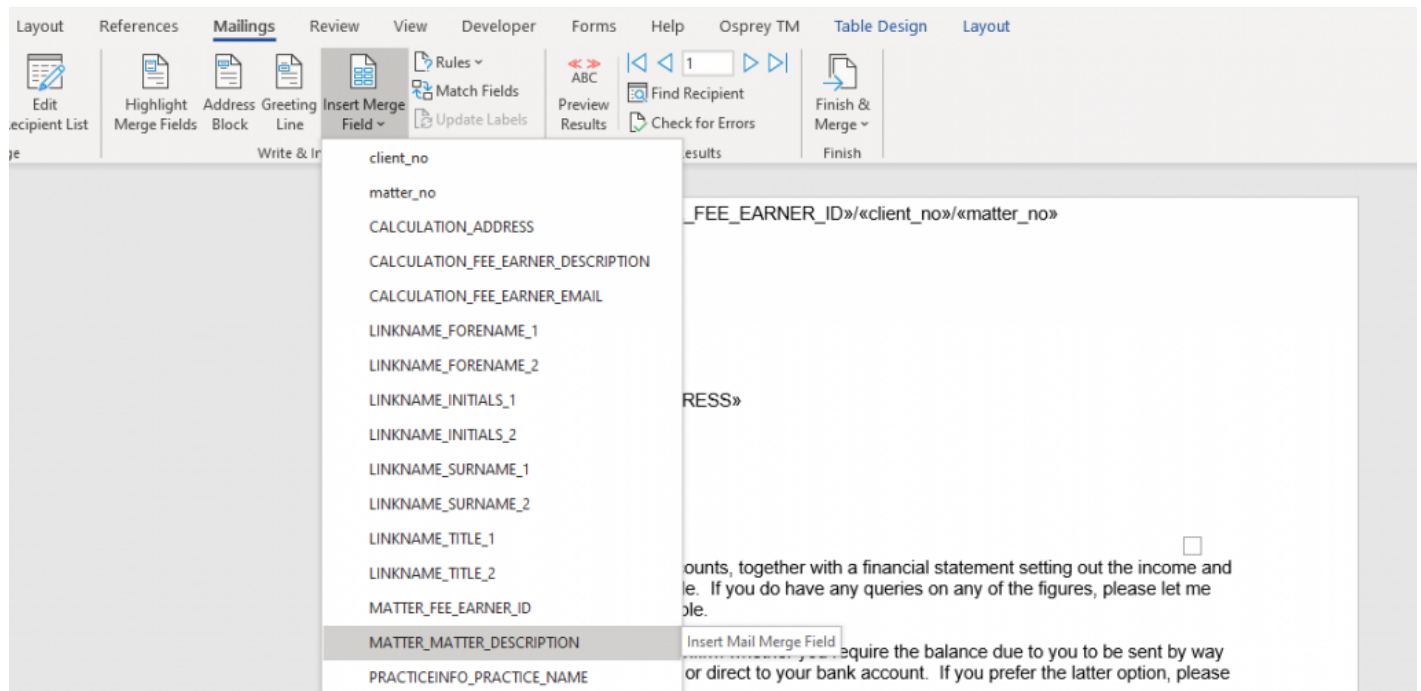
{ IF { MERGEFIELD LINKNAME_SURNAME_1 } = "{ MERGEFIELD LINKNAME_SURNAME_2 }" "{ MERGEFIELD LINKNAME_TITLE_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_1 }{ MERGEFIELD LINKNAME_SURNAME_1 }" "{ IF { MERGEFIELD LINKNAME_SURNAME_2 } = "" "{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 }" "{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_2 } { MERGEFIELD LINKNAME_SURNAME_2 }" } }
{ MERGEFIELD CALCULATION_ADDRESS }

Dear { IF { MERGEFIELD "TK_CLPERSONAL_tk_SALUTATION" } = "" "{ IF { MERGEFIELD LINKNAME_SURNAME_1 } = "{ MERGEFIELD LINKNAME_SURNAME_2 }" "{ MERGEFIELD LINKNAME_TITLE_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_SURNAME_1 }" "{ IF { MERGEFIELD LINKNAME_SURNAME_2 } = "" "{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 }" "{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 } and { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_SURNAME_2 }" }" }" "{ MERGEFIELD "TK_CLPERSONAL_tk_SALUTATION" }" }

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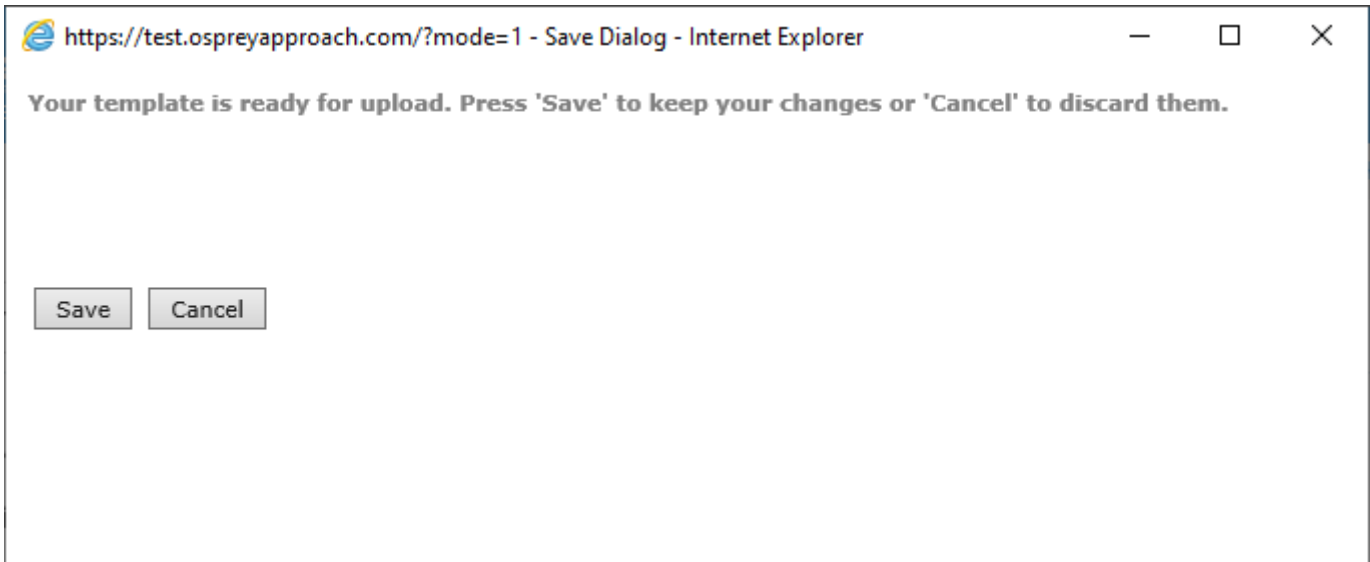
To unlink the field you have removed from the template, select the relevant Standard Document Fields radio button and Available Table, place a tick in the Link/Unlink box, and click Save:

 Design Document   Preview Document

STANDARD DOCUMENT FIELDS

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

Available Tables | LINKNAME ⌄ |

MANAGE FIELDS

 Save

LINK/UNLINK	FIELD	LINKED? ↓
☑	TITLE_2	●
☐	TITLE_1	●
☐	SURNAME_2	●

Linking Fields to Documents Using the 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 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 Documents

+ Add Standard Document   + Add Current Document

Filter by:

Document Type:	Standard ⌄
Work Type:	ALL ⌄
Expert Type:	None ⌄

Search... 🔍

WORK ID	DESCRIPTION	EXPERT TYPE	RETENTION PERIOD	COPY TO CLIENT	COPY TO ASSOCIATE
FWRCP	_1 doc			N	N
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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- 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

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.

Select Design Document:

Word will open the document template:

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

Your Ref:

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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

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.