

Osprey Approach: Add Multi-Record Dossier Fields to Standard Documents

This help guide was last updated on Jul 10th, 2024

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This guide will show you how to add multi-record fields into your standard documents

Multi Record dossiers offer a way to record an ever-growing table of data. This may be a list of assets and their values when working with a probate or divorce matter, or a table of invoice details for a debt recovery matter.

These then can be mapped into your Osprey documents as a table.

At least one Multi-Record Dossier must be set and populated with records.

Locate your Document

To add the dossier to a document, you must either decide to create a new document, or amend an existing one.

Refer to our "Create a new Standard Document" if you wish to create a new document.

Link fields to your document

Navigate to Supervisor > Case Management Setup > Standard Documents. Locate the document and select Fields.

| Supervisor Case Manag | gement Setup Standard Documents |
|---------------------------|---------------------------------|
| 🕂 Add Standard Document | ↔ Add Current Document |
| Document Type: | Standard 🗸 |
| Filter by Work Type: | All 🗸 |
| Filter by Expert Type: | (None) 🗸 |
| WORK ID | DESCRIPTION |
| \ | multiline document |
| FWRCP | Multiline Document 🖉 Edit |
| | P Fields |
| | E-mails |
| | £ Rate |

Locate the dossier page and link all the required fields to the document.

| Supervisor | Case Management Setup Standard Documents Standard Document:Multiline Document | | |
|------------------|---|---------|---|
| 🙋 Design Do | ocument C Preview Document | | |
| STANDARD D | OCUMENT FIELDS | | |
| 🔘 Client 💿 D | ossier 🔘 Formula 🔘 Client Dossier 🔘 Ask 🔘 Include Document 🔘 CDS | | |
| Available Tables | 3 | | |
| Multiline Do | ssier 🗸 | | |
| MANAGE FIEL | LDS | | |
| 🖹 Save | | | |
| LINK/UNLI | FIELD | LINKED? | |
| | Multi-Record 1 | • | • |
| | Multi-Record 2 | • | |
| | Multi-Record 3 | • | |

From the insert menu insert a table of the appropriate size. In the first row enter the column headings

| Header 1 | Header 2 | Header 3 | |
|----------|----------|----------|--|
| | | | |

Place the cursor in the first cell of the second row and from Mailings > Insert Merge Fields drop-down list from the top ribbon select any field.

| 🛚 AutoSave 🔵 Off) 📙 🏷 - 🕖 🔟 - 🔻 fc9 | 3a829-d368-4544-be69-1ef11ad93 | 3c6.dot - Compatibility Mode ∽ |
|---------------------------------------|---|--|
| File Home Insert Draw Design Layout F | References <mark>Mailings</mark> Revie | ew View Developer Help Osprey Approach |
| Envelopes Labels Create | Highlight Address Greeting Merge Fields Block Line | Insert Merge Field → |
| L | | client_no |
| | | matter_no |
| | | CALCULATION_ADDRESS |
| - | | CALCULATION_FEE_EARNER_DESCRIPTION |
| - | | CALCULATION_FEE_EARNER_EMAIL |
| - | | LINKNAME_FORENAME_1 |
| - | | LINKNAME_FORENAME_2 |
| | ÷÷ | LINKNAME_INITIALS_1 |
| 1 | _ | LINKNAME_INITIALS_2 |
| - T | | LINKNAME_SURNAME_1 |
| - | | LINKNAME_SURNAME_2 |
| | | LINKNAME_TITLE_1 |
| | | LINKNAME_TITLE_2 |
| | | MATTER FEE EARNER ID |
| | | MATTER MATTER DESCRIPTION |
| | | |
| | | |
| | | |
| 10 | | INCDUC_Header |
| - | | AutoMergeField |

The merge field(s) related to Multi-Record Dossiers are not displayed by the Insert Merge Fields drop-down list, therefore, any other can be selected.

Right-click on the inserted Merge Field > Edit Field

| «client no | | |
|------------|----------------------------------|---|
| | Search the menus | _ |
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| | [≞ору | |
| | Paste Options: | |
| | <u>C</u> | |
| | Depdate Field | |
| | <u>E</u> dit Field | |
| | Toggle Field Codes | |
| | A <u>F</u> ont | |
| | Ξ _¶ <u>P</u> aragraph | |

Change the existing Name only by typing "TableStart:", then the Dossier Page ID

| Field | | | ? | × |
|--|--|---|-----|-----|
| Please choose a field <u>Categories:</u> (All) <u>Field names:</u> Fill-in GoToButton GreetingLine Hyperlink If IncludePicture IncludeText Index Info Keywords LastSavedBy Link ListNum MacroButton | Field properties Field name: TableStart:MultiDoss Forma <u>t</u> : (none) Uppercase Lowercase First capital Title case | Field options Text to be inserted <u>b</u> efore: Text to be inserted <u>a</u> fter: <u>Mapped field</u> V <u>e</u> rtical formatting | | |
| MergeRec MergeSeq Next Description: Insert a mail merge field F <u>i</u> eld Codes | | Preserve formatting during updates OK | Car | cel |

Click OK to save the merge-field changes

Repeat the previous step into the last cell of the second row, but by typing "TableEnd" instead of "TableStart"

| Field | | | ? | × |
|---|---|---|-----|-----|
| Please choose a field <u>Categories:</u> (All) <u>Field names:</u> Fill-in GoToButton GreetingLine Hyperlink If IncludePicture IncludeText Index Info Keywords LastSavedBy Link ListNum MacroButton <u>MergeField</u> MergeSeq Next | Field properties Field name: TableEnd MultiDoss Format: (none) Uppercase Lowercase First capital Title case | Field options Text to be inserted <u>b</u> efore: Text to be inserted <u>a</u> fter: Mapped field Vertical formatting | | |
| Insert a mail merge field | | ОК | Can | cel |

Insert merge-fields (any) into each cell from the second row of the table, including in the first cell immediately after "TableStart" merge-field and also into the last cell before "TableEnd"

Edit each merge field and rename it with the ID of the desired multi-record Dossier Field using the format «FieldID»

| Header 2 | Header 3 |
|----------|----------------------------------|
| «Multi2» | «Multi3» «TableStart: MultiDoss» |
| ⊢ « | leader 2 Multi2» |

If necessary, add Totals into the last row in the same way, but using the format «PageID_FieldID_TOTAL» when editing this merge-field.

Once you are finished with your document template, close the document and save the template back into Osprey.

Producing your document

Running the document via Document production will show all dossier entries for your loaded client within your Word document.

| Case Management Dossier 100003/1 (O'Wilson-Smith Steve) FE:DAI | N WT:FWRCP Purchase 6 Anfield Road Matter level page : Multiline Dossier | | | | |
|--|--|----------------|------|--------|---|
| Add Record Cancel | | | | | |
| MULTI-RECORD 1 | MULTI-RECORD 2 | MULTI-RECORD 3 | EDIT | DELETE | |
| Record 1 | Record 2 | Record 3 | 0 | Ō | ^ |
| Record 1a | Record 2a | Record 3a | 0 | Ō | |
| Record 1b | Record 2b | Record 3b | 0 | Ō | |
| | | | | | |

| | Header 5 |
|--------|---------------------------|
| ord 2 | Record 3 |
| ord 2a | Record 3a |
| ord 2b | Record 3b |
| | ord 2 ord 2a ord 2b |