Osprey Approach: Add Multi-Record Dossier Merge-fields to Standard Documents

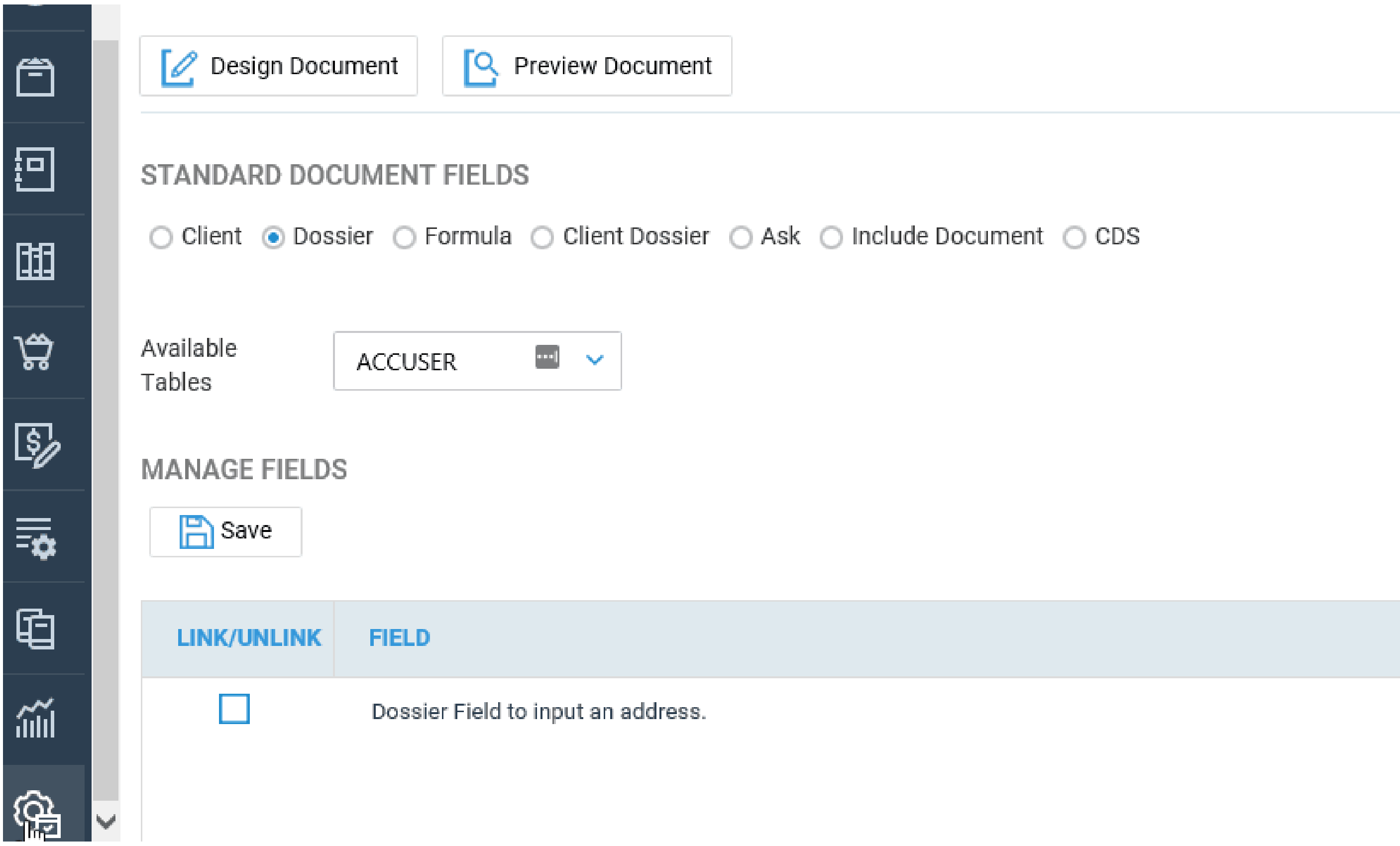
This help guide was last updated on
Apr 11th, 2024

The latest version is always online at
https://support.ospreyapproach.com/?p=17636

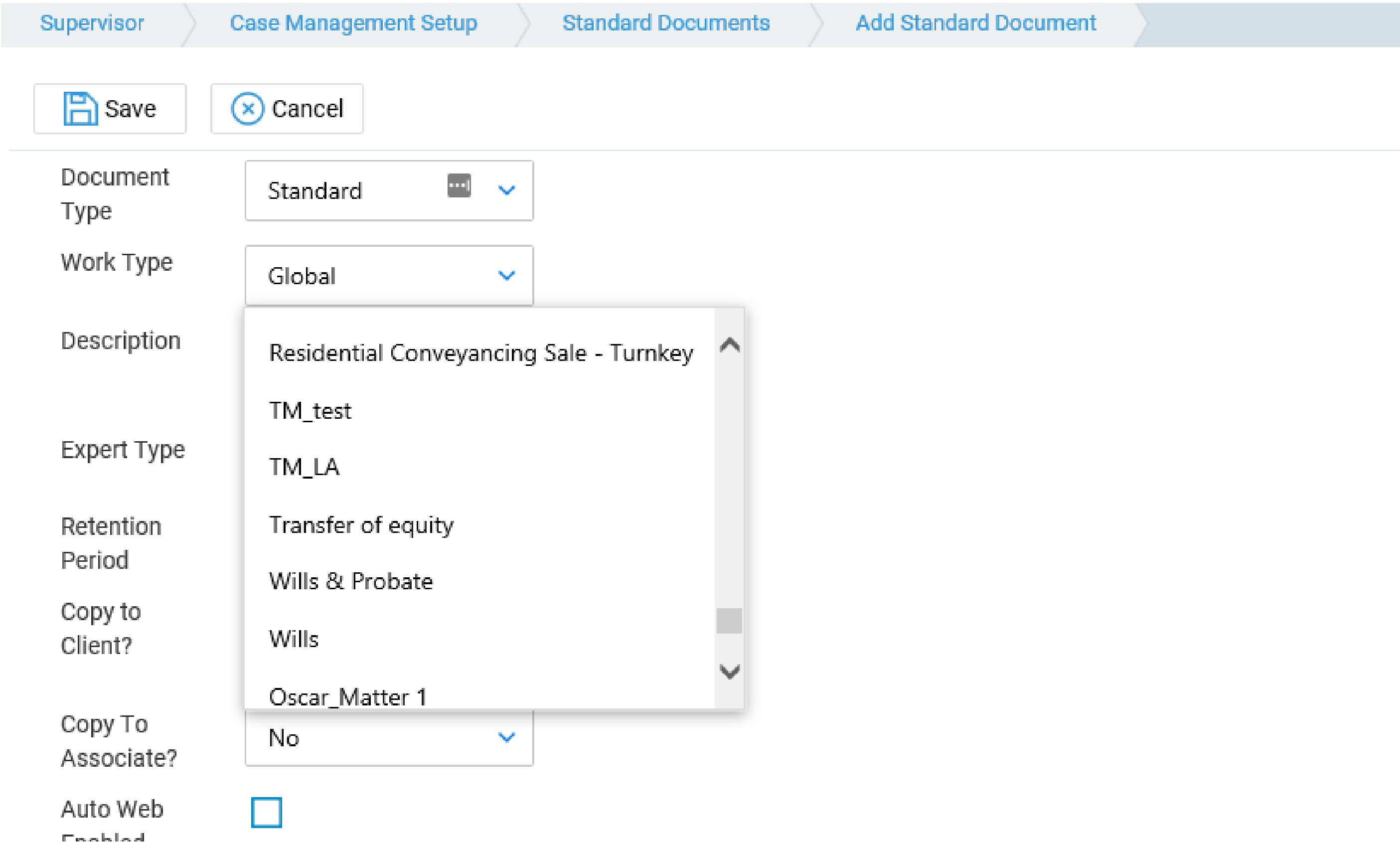
If you have created Multi-line Dossier pages you can display the information within Standard Documents, this guide will show the process of creating a table to merge all the records.

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

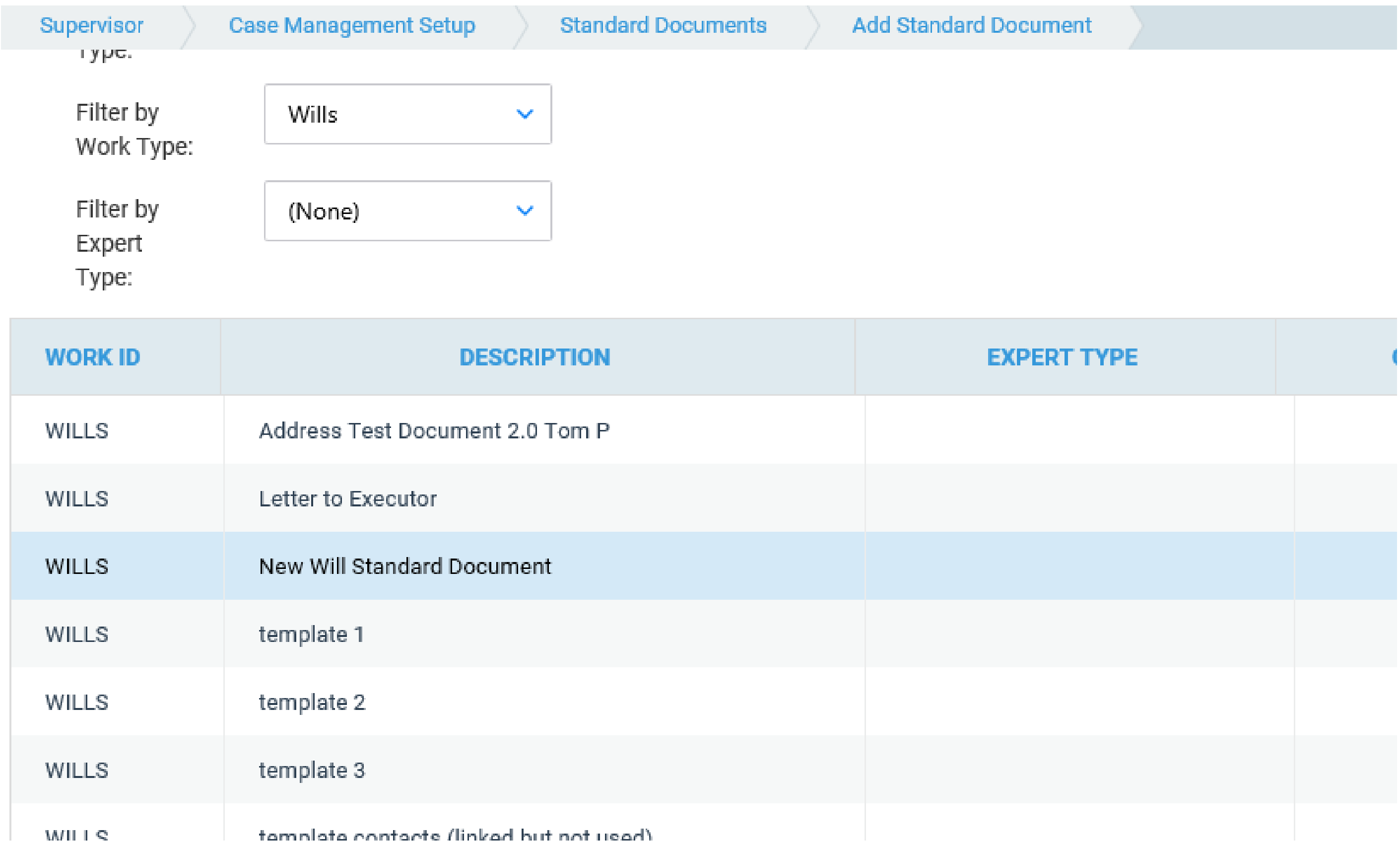
Multi-record Dossier Pages can only be populated using the Osprey Approach App for Windows.



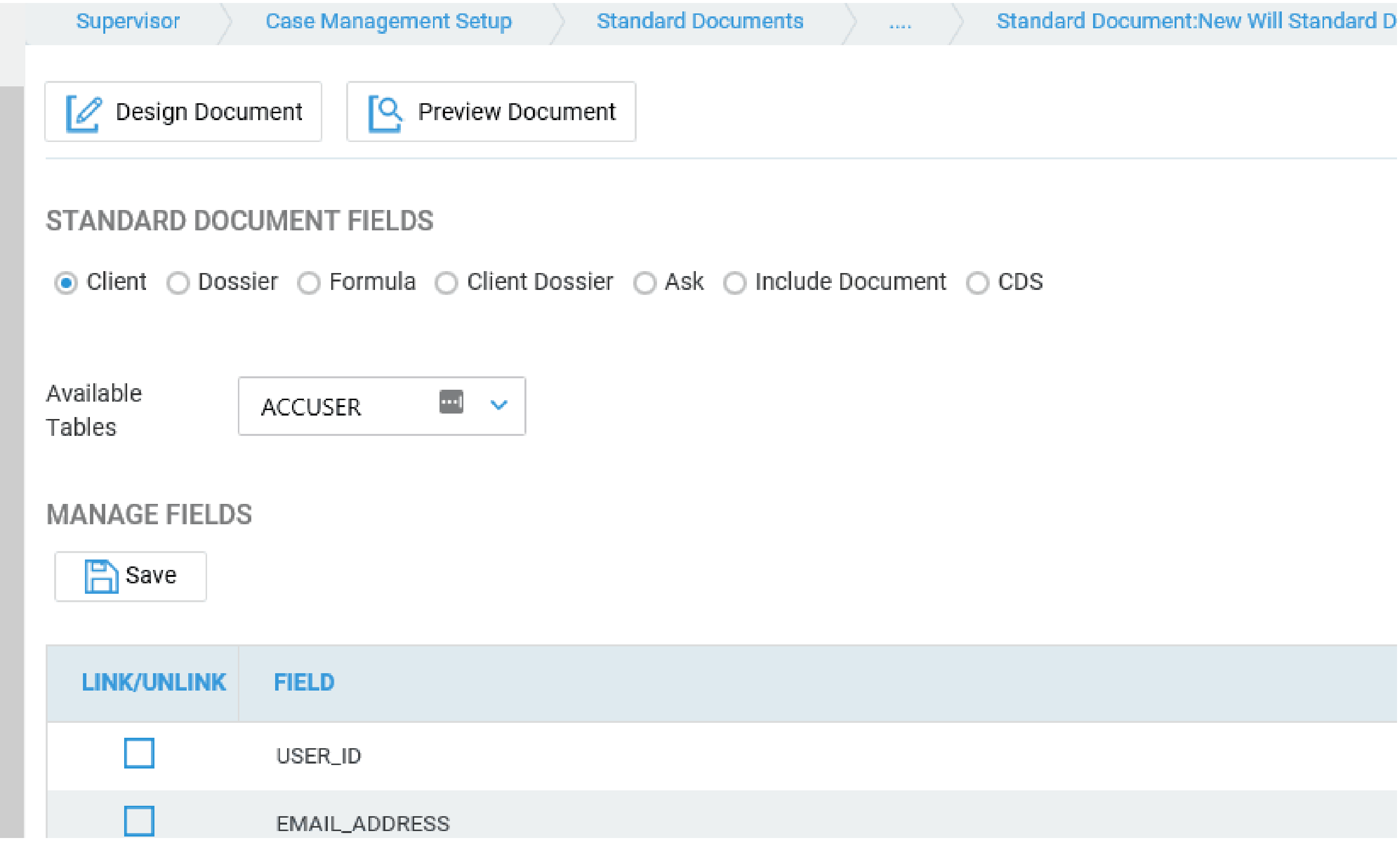
Select Supervisor and then Case Management Setup, Standard Documents, Add Standard Document



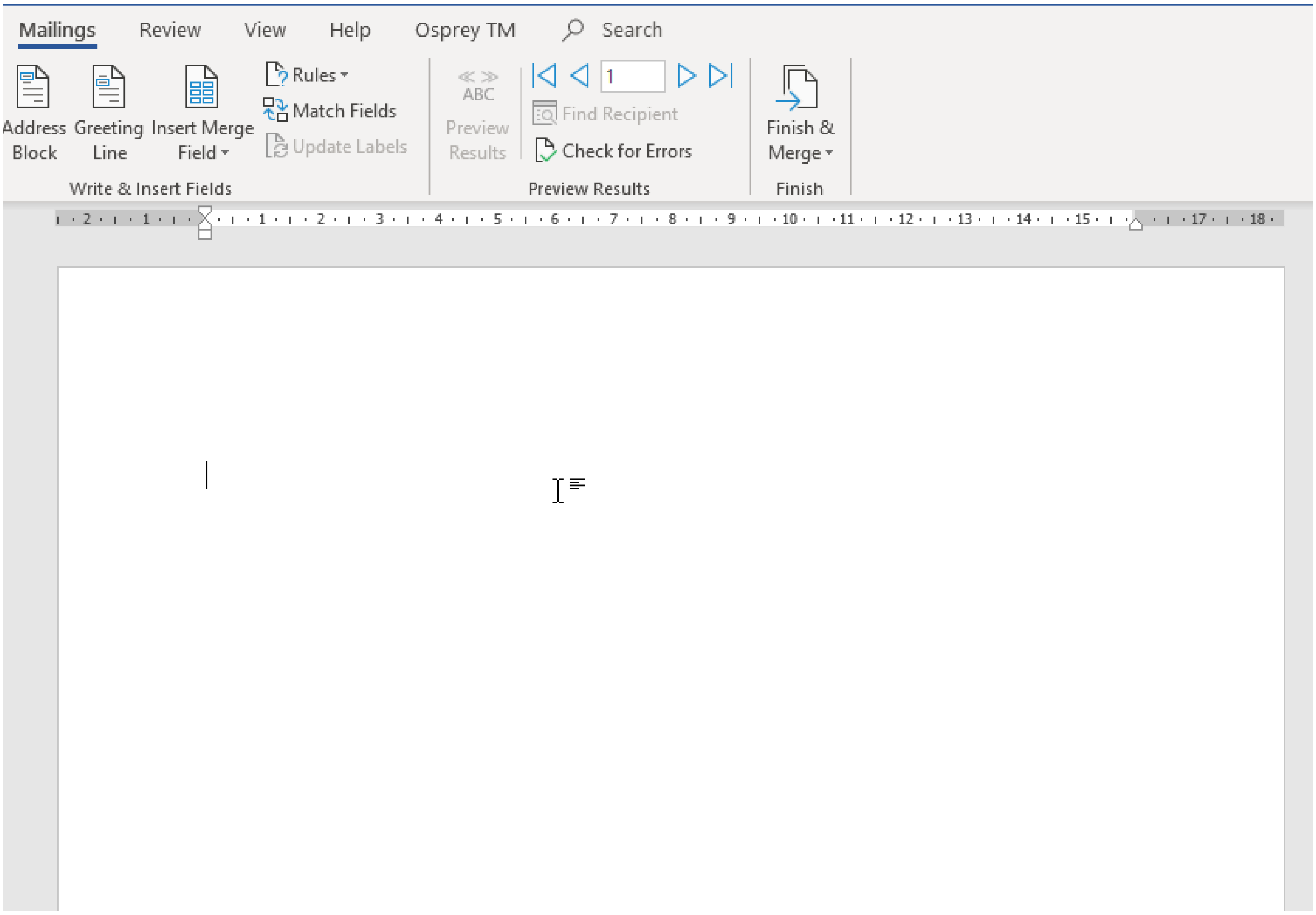
Select a Work Type, Fill in a suitable description and other options



Locate the new template and right click to select Fields



Select Dossier, choose a Dossier Page, then tick the fields to link, click save and finally Design Document to launch the template



Insert content

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

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

Note – The merge-field 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

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

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”

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»

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