



Osprey Approach: Creating new Dossier Fields and Pages

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The latest version is always online at
<https://support.ospreyapproach.com/?p=1737>

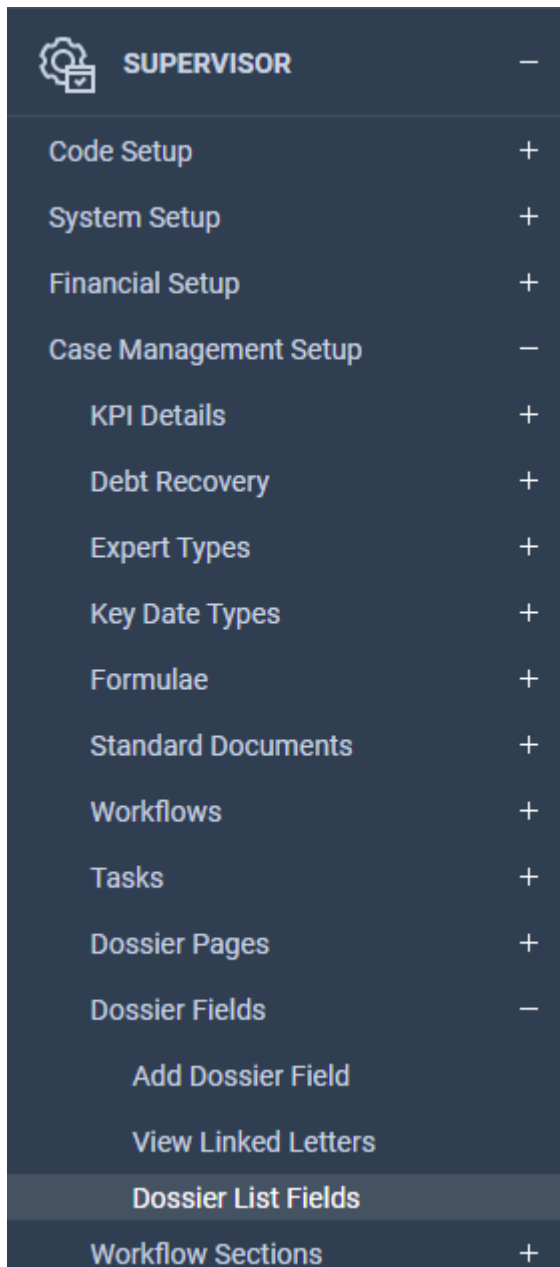
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You can use dossier pages to store additional data on your matters which can then be merged into your documents. This guide walks you through the process of creating dossier fields and adding them to a dossier page.

Creating Dossier List Fields

Navigate to the 'Supervisor' area within Osprey and select 'Case Management Setup'.




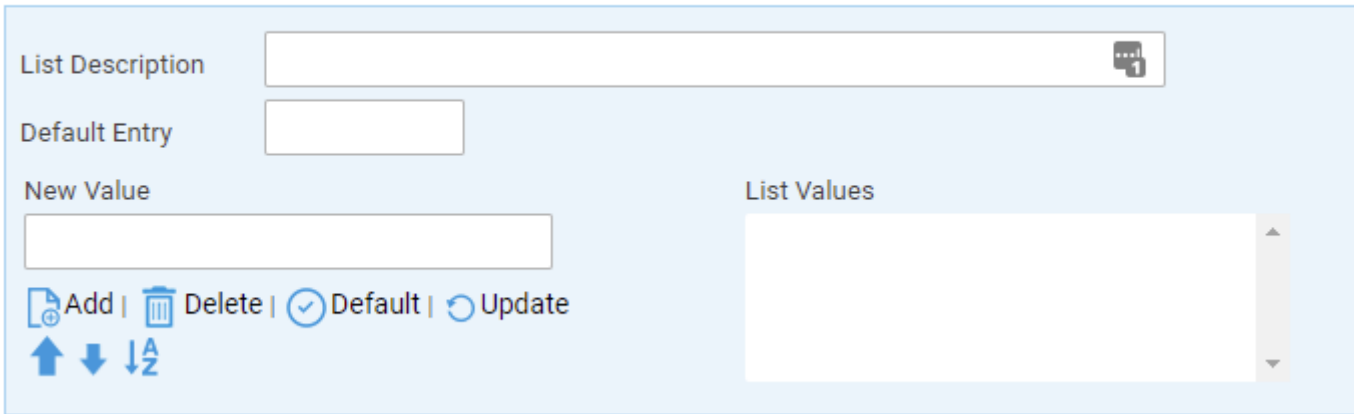
Select 'Dossier Fields' under 'Case Management Setup' which will show you an additional option to 'Dossier List Fields'. Select this to open the 'List Overview Screen'.



| LIST ID | LIST DESCRIPTION |
|---------|------------------|
|---------|------------------|

You may select 'New' to create a new list.

 Save |  Delete |  Cancel



The screenshot shows a configuration window for a list. At the top, there are three buttons: 'Save' (with a floppy disk icon), 'Delete' (with a trash can icon), and 'Cancel' (with an 'X' icon). Below these are four input fields: 'List Description' (with a character count of 60/1), 'Default Entry', 'New Value', and 'List Values' (a list box). At the bottom, there are four buttons: 'Add' (with a plus icon), 'Delete' (with a trash can icon), 'Default' (with a checkmark icon), and 'Update' (with a refresh icon). Below these buttons are three arrow icons: an up arrow, a down arrow, and a double arrow pointing up and down.

The list description can be up to 60 characters and can include spaces, as it is a description rather than an ID.

Type the first entry in the New Value box and select 'Add', you may add as many entries as required.

You may move items up and down using the arrows.

To set the default entry select an item and select 'Default'.

Finally, select 'Save'

You will be returned to the list of fields with your newly created one visible in the list, as well as any existing Dossier List Fields set up if any others have been created.

Repeat this process for all list you want to create. Once all lists have been created you will then need to create Dossier Fields to host the lists.

Creating Dossier Fields

Navigate to the 'Supervisor' area within Osprey and select 'Case Management Setup'.

Select 'Dossier Fields' under 'Case Management Setup' which will show you an additional option to 'Add Dossier Field'. Select this to open the 'Add Screen'.

The image shows a software interface for a supervisor. On the left is a dark sidebar with a gear icon and the word 'SUPERVISOR'. Below it are several menu items with expand/collapse icons: Code Setup (+), System Setup (+), Financial Setup (+), Case Management Setup (-), KPI Details (+), Debt Recovery (+), Expert Types (+), Key Date Types (+), Formulae (+), Standard Documents (+), Workflows (+), Tasks (+), Dossier Pages (+), and Dossier Fields (-). At the bottom of the sidebar are two buttons: 'Add Dossier Field' and 'View Linked Letters'. The main area of the interface is a light-colored form with a 'Save' button and a 'Cancel' button at the top. The form contains four fields: 'Field Id' (a text input), 'Description' (a larger text area), 'Type' (a dropdown menu currently showing 'Text'), and 'Length (no of chars)' (a text input currently showing '50').

You are now able to enter the new 'Dossier Field ID' and 'Dossier Field Description' to be created. The description will be the name shown against the Dossier Field. The Dossier Page ID is shortened text of the Dossier Field Description which is used when mapping Dossier Fields onto your document templates and views.

Please note that no spaces can be used in the Dossier Field ID so would suggest using '_' in replacement of this. The Dossier Field ID is also limited to a maximum of 15 characters.

So for example, **NATIONAL INSURANCE NUMBER** could be created as **NI_NUMBER**

You will also have to select the 'Type' of field you are wanting to create. The following fields are available for selection.

- Address
- Contact
- Organisations
- Date
- Decimal
- Email Address
- Formula
- Integer

- List
- Money
- Text
- Multiline Text
- Web Address

Once we have entered the details for our field, select the 'Save' button.

Field Id:

Description:

Type:

Length (no of chars)

You will be returned to the list of dossier fields with your newly created one visible in the list, as well as any existing Dossier Fields set up if any others have been created.

Repeat this process for all fields you want to create. Once all fields have been created you will then need to populate these onto the relevant dossier page.

Creating a Dossier Page

Select 'Case Management Setup' under the 'Supervisor' area.

Now select 'Dossier Pages', which will show you the option to 'Add Dossier Page'. On selecting this, the following screen will show:

 Save

 Cancel

Page Id:

Description:

You can now enter the new Dossier Page ID and Dossier Page Description to be created. The description needs to be relevant the fields stored on the Dossier Page, so that it can easily be located.

The Dossier Page ID will be a shorter version of the Dossier Page Description. No spaces can be used in the ID, as with the Dossier Fields, so an underscore will have to be used. The Dossier Page ID is also limited to a maximum of 15 characters.

 Save

 Cancel

Page Id:

Description:

Now select 'Save' to be returned to your list of dossier pages, with your newly created one now available for selection.

| | |
|-------------|---------------------------|
| CLIDETS_01 | Additional Client Details |
| CLIENT_DOS | Client Dossier Page |
| CLIENT_INFO | Client Information |

Alongside the name of the new Dossier Page created, when you right click on the relevant page, you will see the following options available:

- Edit
- W/T Links
- Fields

'Edit' will allow you to change the Dossier Page description shown. However the Dossier Page ID will be greyed out as this cannot be edited once created.

'W/T Links' will allow you to link the new Dossier Page to the relevant work types or to set it as GLOBAL, which means that it will be available across all clients and matters.

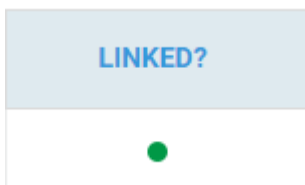
The 'Fields' option will allow you to link any relevant Dossier Fields to the Dossier Page. Please note that Dossier Pages only allow up to 20 fields to be stored, however you are not limited on the amount of Dossier Pages you can create.

Once the 'Fields' option has been selected you will be shown a new screen with all Dossier Fields available where you can select the relevant fields to be linked to your new Dossier Page.

| <input type="checkbox"/> | FIELD ID | DESCRIPTION | TYPE | LINKED? |
|--------------------------|-----------------|--|-----------|---------|
| <input type="checkbox"/> | __PP_DOCIMP_CON | Details for Contact Responsible | Multiline | ● |
| <input type="checkbox"/> | __PP_DOCIMPMATT | Set Out The Manner in Which They Will be Provided | Multiline | ● |
| <input type="checkbox"/> | __PP_DTTRIBAL | Date for Provision of Trail Balance | Date | ● |
| <input type="checkbox"/> | __PP_EXPACCOUNT | Explanation on the Accounts Migration Process | List | ● |
| <input type="checkbox"/> | __PP_IMPLETEMP | Explanation of 2 Implementation letter templates | List | ● |
| <input type="checkbox"/> | __PP_LEDGERPDF | Date for Provision of Client Ledger Card PDFs | Date | ● |
| <input type="checkbox"/> | __PP_LTRHDCONT | Details for Contact Responsible | Date | ● |
| <input type="checkbox"/> | __PP_MATTDATE | Date for Matter History Documents | Date | ● |
| <input type="checkbox"/> | __PP_MNTHENDBNK | Date for provision of Month end bank reconciliatio | Date | ● |
| <input type="checkbox"/> | __PROJ_PLAN_DTE | Confirm Date of Project Planning Session | Date | ● |

In order to link the Dossier Fields, select the tick box alongside the relevant fields and then click on the 'Add Quick Links' button. You will be able to use the filter search available if you have a lot of fields in order to locate the relevant ones.

Once selected, a green dot in the 'Linked' column will denote that this field is linked to your page



Once you have located and linked all fields required you will then have the option to design the Dossier Page, which allows you to place the fields where you wish.

Select 'Design Page'.

The fields will automatically have been placed in the first available slot automatically upon linking.

 Save

 Cancel

| | | | |
|-------------|--|-------------|--|
| Position 1 | <input type="text" value="__GOLIVE_CLI_IM"/> | Position 2 | <input type="text" value="Leave blank"/> |
| Position 3 | <input type="text" value="Leave blank"/> | Position 4 | <input type="text" value="Leave blank"/> |
| Position 5 | <input type="text" value="Leave blank"/> | Position 6 | <input type="text" value="Leave blank"/> |
| Position 7 | <input type="text" value="Leave blank"/> | Position 8 | <input type="text" value="Leave blank"/> |
| Position 9 | <input type="text" value="Leave blank"/> | Position 10 | <input type="text" value="Leave blank"/> |
| Position 11 | <input type="text" value="Leave blank"/> | Position 12 | <input type="text" value="Leave blank"/> |
| Position 13 | <input type="text" value="Leave blank"/> | Position 14 | <input type="text" value="Leave blank"/> |
| Position 15 | <input type="text" value="Leave blank"/> | Position 16 | <input type="text" value="Leave blank"/> |
| Position 17 | <input type="text" value="Leave blank"/> | Position 18 | <input type="text" value="Leave blank"/> |
| Position 19 | <input type="text" value="Leave blank"/> | Position 20 | <input type="text" value="Leave blank"/> |


Each space in the page will allow you to click on the drop-down arrow, which will list the available fields.

Select a field to place in the chosen area.

Please note that if the field is already present in the page, then it will be removed from the original position and placed in the new one.

Once the Dossier Page has been designed as required select 'Save' to keep any changes made.

Once saved, you will see the option to 'Preview Page'. Select this in order to see how this will look when entering details within the dossier.

 Cancel

ADDITIONAL CLIENT DETAILS (PREVIEW)

Provisional
Client and
Matter Go Live:

03/09/2019