



Osprey Approach: Create Multi-Line Dossier Pages

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The latest version is always online at
<https://support.ospreyapproach.com/?p=17422>

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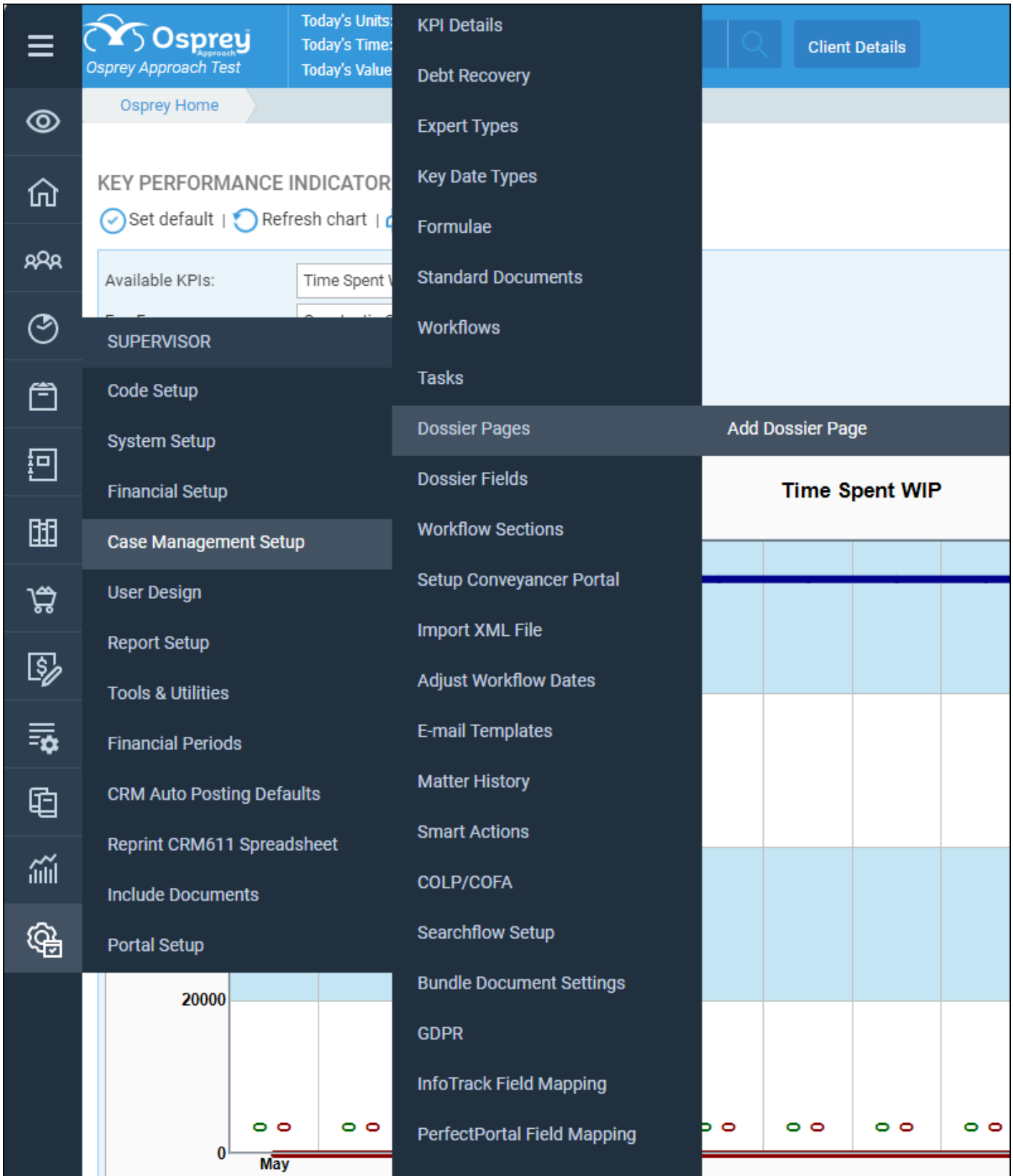


This guide walks you through the process of creating Dossier Pages which allow multiple entries



Creating Multi-Line Dossiers

You can use dossier fields and dossier pages to store additional data on your files and merge through into your documents.

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:

New Dossier Page

Allow multiple entries:


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. To make it a Multi-line page tick the option Allow multiple entries.


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.


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

Alongside the name of the new Dossier Page created, when you right click on the relevant page

NEW_DOSSIER	Dossier nou
NEW_DP	TEST_Docs
NEW_STARTER	New Starter
NEWPAGE	New Dossier Pa

 Edit

 W/T Links

 Fields

'Edit' will allow you to change the Dossier Page description shown.

Both Dossier Page ID and Allow multiple entries will be greyed out as this cannot be edited once created.

Save Cancel Delete

Page Id: NEWPAGE

Description: New Dossier Page

Allow multiple entries:

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

For client level, select Client Dossier Page and the choose from Link to Global, Link to Individual, Link to Company

Supervisor Case Management Setup Dossier Pages

Link/Unlink Refresh

Dossier Page: New Dossier Page

Matter Dossier Page

Client Dossier Page Search...

Link to Global Link

Link to Individual Link

Link to Company Link

For matter level, select Matter Dossier Page, now tick the relevant work type and click Link/Unlink

Supervisor Case Management Setup Dossier Pages

Link/Unlink Refresh

Dossier Page: New Dossier Page

Matter Dossier Page

Client Dossier Page Search...

<input type="checkbox"/>	WORK ID	WORK DESCRIPTION	LINKED
<input checked="" type="checkbox"/>	WT_TR	T_Adelini	●
<input checked="" type="checkbox"/>	WT_6	Oscar_Matter 6	●

'Fields' will allow you to link any relevant Dossier Fields to the Dossier Page.

Select the tick box alongside the relevant fields and the click on the 'Add Quick Links' button

Supervisor > Case Management Setup > Dossier Pages

Filter

Add Quick Links Export

By Field All Search...

Type:

<input type="checkbox"/>	FIELD ID	DESCRIPTION	TYPE	LINKED?
<input checked="" type="checkbox"/>	A2Q_POSTCODE	PostCode	Text	●
<input checked="" type="checkbox"/>	A2Q_PRICE	Price	Money	●

Please note you may only link a maximum of 20 fields to a Dossier Page

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

Select Design Page,

Add Quick Links Design Page Preview Page Export

Filter By Field Type: All

<input type="checkbox"/>	FIELD ID	DESCRIPTION	TYPE	LINKED?
<input type="checkbox"/>	A2Q_POSTCODE	PostCode	Text	●
<input type="checkbox"/>	A2Q_PRICE	Price	Money	●
<input type="checkbox"/>	ADO_MONEY	adoption money	Money	●

Using the drop down lists position the fields in the desired location

Save Cancel

Position 1	A2Q_POSTCODE	Position 2	A2Q_PRICE
Position 3	Leave blank	Position 4	Leave blank
Position 5	Leave blank	Position 6	Leave blank

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

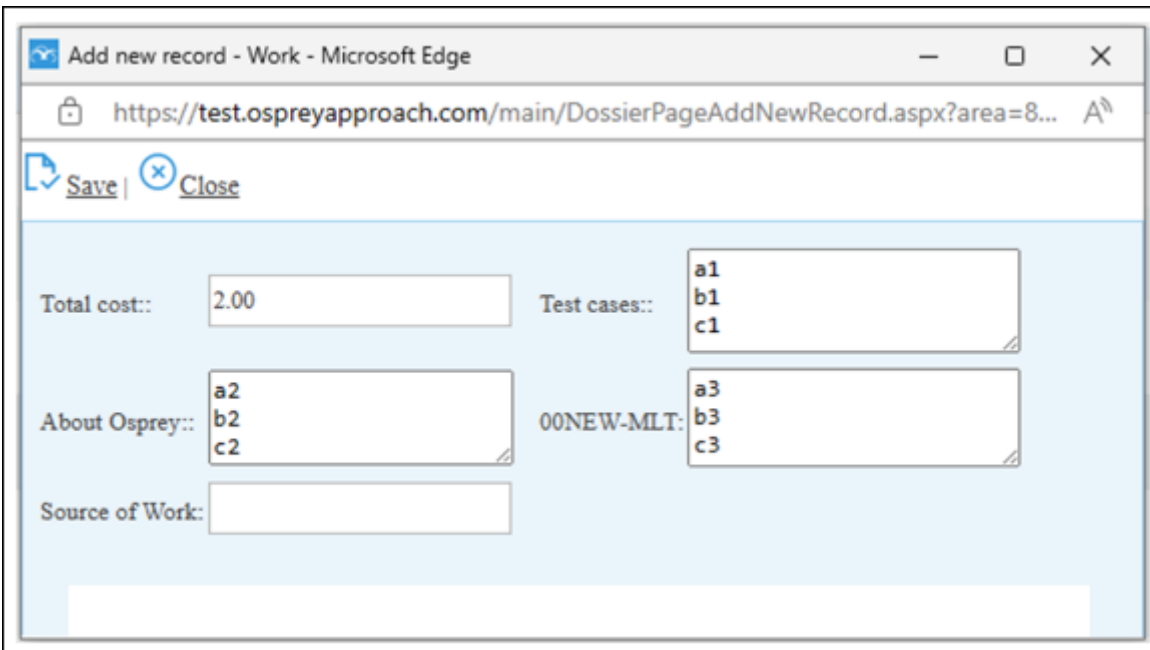
Once saved, you will see the option to 'Preview Page'. Select this in order to see how this will look when entering details within the dossier.

Using Multi-Line Dossiers

You may amend and create records in your multiline dossier fields. Simply access the dossier page as you normally would. Your multiline field will have an Add Record option in the top left.

DATE OF GIFT	NAME AND RELATIONSHIP OF WHO RECEIVED THE GIFT	A VALUE AT DATE OF GIFT "C"	EDIT	DELETE
11/11/2023 00:00:00	Matt Wood - Son	15000.0000		
14/11/2023 00:00:00	Josh Parson - Father	25000.0000		
14/12/2023 00:00:00	John Cash - Uncle	20.0000		
19/12/2023 00:00:00	Bobson	50.0000		

After clicking this, you may add another line onto the field.



00NEW-MLT:

When you have filled in the information for your new line, click on Save. The information entered will be added as a new row.

Multiline Dossiers can also be set during the running of a workflow. A new Edit Multi-Line Dossier action is available from the standard actions list.

ACTIONS

Send XIT2 Milestone Info

Tick Task

Run IHT205

Run IHT400

Send merged email template

Post to Debt Ledger

View Debt Summary

Posting to Time Ledger

Send an automatic email to a user

Unpublish a Published Matter

Update Workflow Status Bar

Update Chain View Status

Produce Oyez Form

Produce Land Registry Search

Produce Lexis Nexis Documents

Edit multi-record dossier

PerfectPortal Update Key Stage