



Osprey Approach: Edit a Standard Document template (App)

This help guide was last updated on
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The latest version is always online at
<https://support.ospreyapproach.com/?p=56374>

[Click here for a printer-friendly version](#)



You MUST be on the supervisor access template to see the supervisor options within the case management app.

To edit a Standard Document or precedent letter in your system, follow the steps below.

Navigate to Supervisor> Standard Documents. Using the search filter on the right locate the document you wish to edit. Right click on the document and select fields:

Please note the edit button here is simply for editing the metadata of the file not the document itself.

Standard Documents

+ Add Standard Document

+ Add Current Document

Filter by:
Document Type: Standard
Work Type: ALL
Expert Type: None

Blank client

WORK ID	DESCRIPTION	EXPERT TYPE	RETENTION PERIOD	COPY TO CLIENT	COPY TO ASSOCIATE
GLOBAL	Blank Client Letter			N	N
CONPUR	Blank Client Letter - RCP	Client		N	N
FW_DR	Blank Client letter FW_DR	Client		N	N
FW_IDA	Blank Client Letter FW_IDA	Client		N	N

Should you wish to add additional merge fields into the letter, you will need to locate these. You will need to select one of the options in the drop down box to locate the relevant table and then link the fields below using the checkboxes and clicking save

Standard Documents

←

Design Document

Preview Document

Standard: Blank Client Letter

STANDARD DOCUMENT FIELDS

☒ Client ☐ Formula ☐ Client Dossier ☐ Ask ☐ Include Document ☐ CDS

Available Tables : ACCUSER

MANAGE FIELDS

Save

LINK / UNLINK	FIELD	LINKED
<input type="checkbox"/>	EMAIL_ADDRESS	<input checked="" type="checkbox"/>
<input type="checkbox"/>	USER_ID	<input checked="" type="checkbox"/>

Should you wish to simply amend the document then select Design Document, at this point the document will open within Microsoft Word and allow you to make your amendments.

Once happy with your amendments, close the Word document and the save prompt will appear for you to save your changes.