



Osprey Approach: Edit a standard document (App)

This help guide was last updated on
Apr 19th, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=56374>



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.

The screenshot shows the 'Standard Documents' interface. At the top, there are two buttons: '+ Add Standard Document' and '+ Add Current Document'. Below these are filter options: 'Filter by: Document Type: Standard', 'Work Type: ALL', and 'Expert Type: None'. A search box on the right contains 'Blank client'. The main area is a table with columns: WORK ID, DESCRIPTION, EXPERT TYPE, RETENTION PERIOD, COPY TO CLIENT, and COPY TO ASSOCIATE. The table lists several documents, including 'GLOBAL Blank Client Letter', 'CONPUR Blank Client Letter - RCP', and 'FW_DR Blank Client letter FW_DR'. An 'Edit Fields' button is overlaid on the table.

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

The screenshot shows the 'Standard Documents' interface in 'Design Document' mode. At the top, there are buttons for 'Design Document' and 'Preview Document'. Below these are navigation options: 'Standard: Blank Client Letter' and 'STANDARD DOCUMENT FIELDS'. There are radio buttons for 'Client', 'Formula', 'Client Dossier', 'Ask', 'Include Document', and 'CDS'. The 'Available Tables' dropdown is set to 'ACCUSER'. Below this is the 'MANAGE FIELDS' section with a 'Save' button. The main area is a table with columns: LINK / UNLINK, FIELD, and LINKED. The table lists 'EMAIL_ADDRESS' and 'USER_ID' fields, both of which are linked (indicated by a red dot).

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

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.