

Osprey Approach: Edit a standard document (Browser)

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The latest version is always online at
<https://support.ospreyapproach.com/?p=56361>

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

Navigate to Supervisor > Case Management Setup > Standard Documents. Using the search filters on the columns 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' page with a breadcrumb trail: Supervisor > Case Management Setup > Standard Documents. The interface includes a sidebar with navigation icons and a main content area with filters and a table.

Filters:


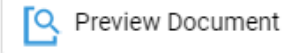
- Document Type: Standard
- Filter by Work Type: All
- Filter by Expert Type: (None)

WORK ID	DESCRIPTION
	blank client
GLOBAL	Blank Client Letter
CONPUR	Blank Client Letter - RCP
FW_DR	Blank Client letter FW_DR

A context menu is open over the 'FW_DR' row, showing options: Edit, Fields, and Email.

Should you wish to add additional merge fields into the letter, you will need to locate these. You will need 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

Supervisor > Case Management Setup > Standard Documents > Standard Document:Blank Client Letter


 

STANDARD DOCUMENT FIELDS

Client Formula Client Dossier Ask Include Document CDS

Available Tables

MANAGE FIELDS



LINK/UNLINK

<input type="checkbox"/>	ACCUSER
<input type="checkbox"/>	ACCUSER
<input type="checkbox"/>	BRANCH
<input type="checkbox"/>	BRANCHINFO
<input type="checkbox"/>	CALCULATION
<input type="checkbox"/>	CLIENT
<input type="checkbox"/>	CONTACT
<input type="checkbox"/>	LASTMATTERDATES

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.