



Osprey Approach: Edit a Standard Document template (Browser)

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



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.

Supervisor

Case Management Setup

Standard Documents

Add Standard Document

Add Current Document

Export

Document Type:

Standard

Filter by Work Type:

All

Filter by Expert Type:

(None)

WORK ID	DESCRIPTION
<input type="text"/>	<input type="text" value="blank client"/>
GLOBAL	Blank Client Letter
CONPUR	Blank Client Letter - RCP
FW_DR	Blank Client letter FW_DR

Edit

Fields

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

Design Document

Preview Document

STANDARD DOCUMENT FIELDS

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

Available Tables

MANAGE FIELDS

Save

LINK/UNLINK

☐

☐

ACCUSER

ACCUSER

BRANCH

BRANCHINFO

CALCULATION

CLIENT

CONTACT

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.