



Osprey Approach: Linking fields to your Standard Documents

This help guide was last updated on
Jan 4th, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=16941>

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



This guide explains how to link and unlink fields from your standard documents to include any information which you store within Osprey.

Linking Fields to Documents Using the Browser

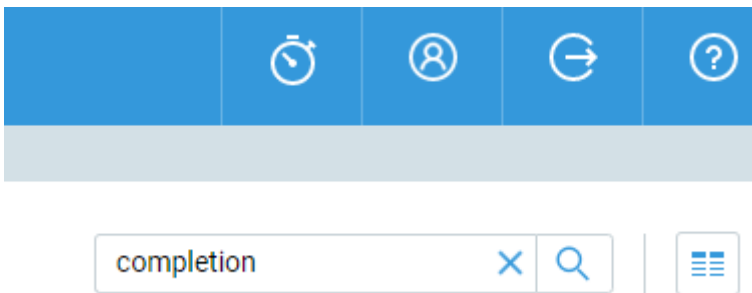
Locating your document template

Navigate to Supervisor > Case Management Setup > Standard Documents. A list of all your available document templates will be displayed.

You can filter the list down using the options at the top left of the screen:

Document Type:	Standard	▼
Filter by Work Type:	Residential Conveya	▼
Filter by Expert Type:	(None)	▼

Or, you can search for a specific template name using the search box in the top right corner:



completion X Q ☰

Linking fields to your document template

Right click on the document you wish to add fields to and select the Fields link button:

Document Type: Standard

Filter by Work Type: Residential Conveya

Filter by Expert Type: (None)

WORK ID	DESCRIPTION
TK_RCS	RCS Cli Completion Statement TK_RCS
TK_RCS	RCS Cli Confirm Completion TK_RCS
TK_RCS	RCS Completion Statement TK_RCS
TK_RCS	RCS Sol Confirm Completion TK_RCS

Edit

Fields

E-mails

Rate

Use the radio buttons to select from the following table types:

- Client - contains all available tables relating to the client and matter
- Dossier - contains all Matter specific dossier page tables linked to the work type of the letter template
- Formula - contains all formula fields created under Supervisor > Case Management Setup > Formulae
- Client Dossier - contains all Global or Client Level dossier tables
- Ask - contains all Ask fields created under Supervisor > Case Management Setup > Formulae > Asks
- Include Document - contains all header and footer include documents created under Supervisor > Include Documents
- CDS - contains all fields relating to Contract Work forms under Case Management

Supervisor > Case Management Setup > Standard Documents > Standard Document:R

Design Document

Preview Document

STANDARD DOCUMENT FIELDS

- Client
 Dossier
 Formula
 Client Dossier
 Ask
 Include Document
 CDS

Now choose from the available tables:

STANDARD DOCUMENT FIELDS

Client
 Dossier
 Formula
 Client Dossier
 Ask
 Include Document
 CDS

Available Tables

- ACCUSER
- ...
- CALCULATION
- CLIENT
- CONTACT
- LASTMATTERDATES
- LINKNAME
- MATTER
- ORGANISATION

MANAGE FIELDS

LINK/UNLINK	FIELD	LINKED?
<input type="checkbox"/>	USER	●
<input type="checkbox"/>	EMA	●



Once you have selected the relevant table, the list of fields in this table will be displayed. Place a tick in the box alongside the fields you wish to link, and click Save.

MANAGE FIELDS

LINK/UNLINK	FIELD	LINKED?
<input type="checkbox"/>	MATTER_DESCRIPTION	●
<input type="checkbox"/>	FEE_EARNER_ID	●
<input checked="" type="checkbox"/>	WORK_ID	●
<input type="checkbox"/>	WIP_LIMIT	●
<input checked="" type="checkbox"/>	UNIQUE_FILE_NO	●

Select Design Document:

Supervisor > Case Management Setup > Standard Documents > Standard Document:RCS

 Design Document  Preview Document

Word will open the document template:

Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»

Your Ref:

1 June 2020

&
«CALCULATION_ADDRESS»

Dear &



RE: «MATTER MATTER DESCRIPTION»

I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

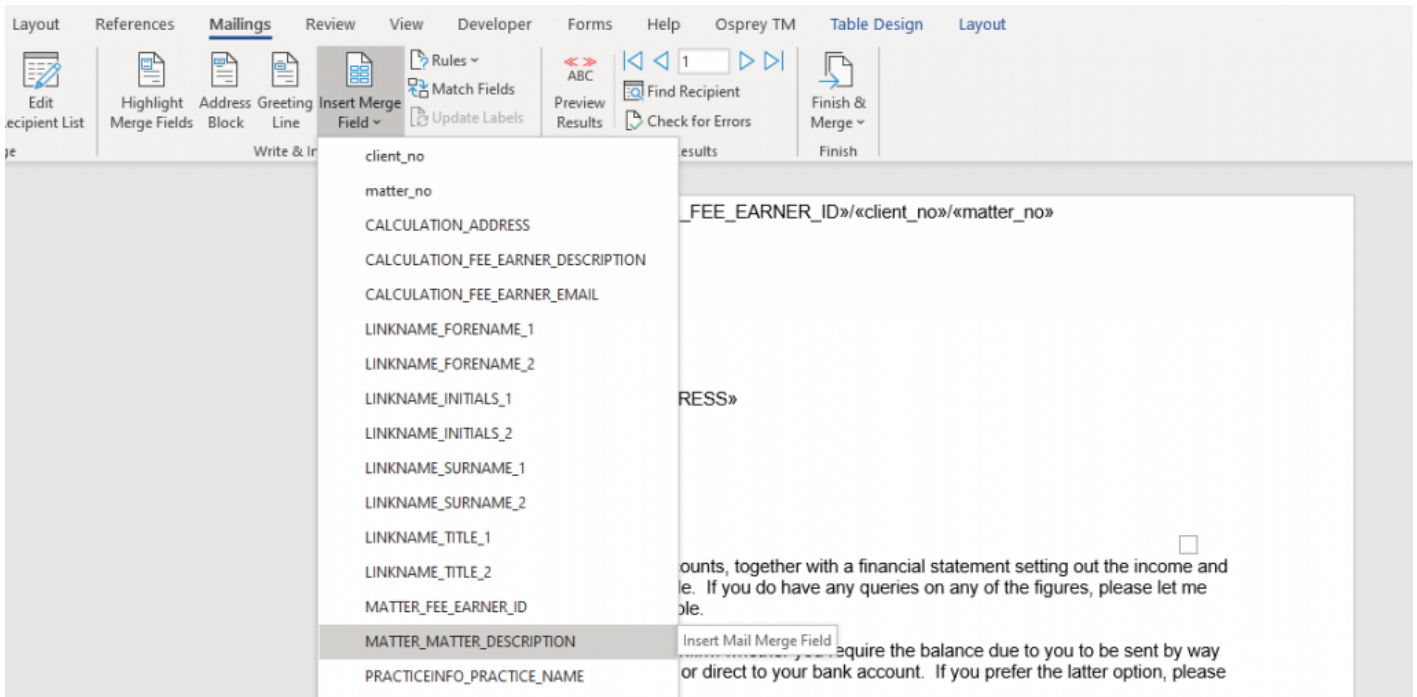
In any event, please confirm whether you require the balance due to you to be sent by way

You may toggle field codes on or off by holding down the Alt key and pressing F9:

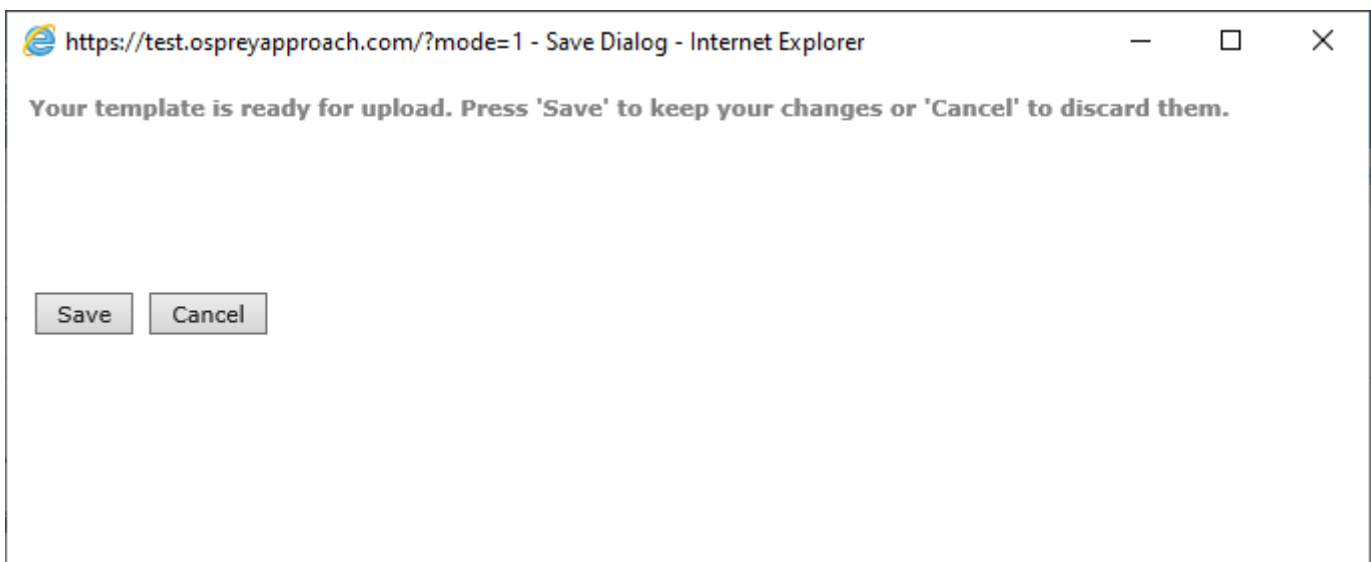
Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»	Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID } { MERGEFIELD client_no } { MERGEFIELD matter_no }
Your Ref:	Your Ref:
1 June 2020	{ SET LETTER { DATE \@ "d MMMM yyyy" } } { ref LETTER \@ "d MMMM yyyy" } * MERGEFORMAT }
& «CALCULATION_ADDRESS»	{ IF { MERGEFIELD LINKNAME_SURNAME_1 } = "" { MERGEFIELD LINKNAME_SURNAME_2 } { MERGEFIELD LINKNAME_TITLE_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 } " " { IF { MERGEFIELD LINKNAME_SURNAME_2 } = "" { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 } " " { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_2 } { MERGEFIELD LINKNAME_SURNAME_2 } } } { MERGEFIELD CALCULATION_ADDRESS }
Dear &	Dear { IF { MERGEFIELD "TK_CLPERSONAL tk SALUTATION" } = "" { IF { MERGEFIELD LINKNAME_SURNAME_1 } = "" { MERGEFIELD LINKNAME_SURNAME_2 } " " { MERGEFIELD LINKNAME_TITLE_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_SURNAME_1 } " " { IF { MERGEFIELD LINKNAME_SURNAME_2 } = "" { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 } " " { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 } and { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_SURNAME_2 } } } " " { MERGEFIELD "TK_CLPERSONAL tk SALUTATION" } }
RE: «MATTER MATTER DESCRIPTION»	RE: { MERGEFIELD MATTER MATTER DESCRIPTION }
I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.	
In any event, please confirm whether you require the balance due to you to be sent by way	


Alt + F9


To link a new field to the document, position your mouse cursor in the place you would like the new field to appear, and from the Mailings menu tab select Insert Merge Field:



Once you have inserted all the required fields into the template, and made any text changes required, close Word using the red X in the top right hand corner, and save your changes:



Removing linked fields from a document

To remove a field from a document, you must first ensure that the field has been removed from the template.

Right click on the document you wish to remove fields from and select the Fields link button:

Document Type: Standard

Filter by Work Type: Residential Conveya

Filter by Expert Type: (None)


WORK ID	DESCRIPTION
TK_RCS	RCS Cli Completion Statement TK_RCS
TK_RCS	RCS Cli Confirm Completion TK_RCS
TK_RCS	RCS Completion Statement TK_RCS
TK_RCS	RCS Sol Confirm Completion TK_RCS

- Edit
- Fields**
- E-mails
- Rate

Select Design Document:

Supervisor > Case Management Setup > Standard Documents > Standard Document:RCS

 Design Document

 Preview Document

Word will open the document template:

Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»

Your Ref:

1 June 2020

&
«CALCULATION_ADDRESS»

Dear &

RE: «MATTER MATTER DESCRIPTION»

I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

In any event, please confirm whether you require the balance due to you to be sent by way

Select the field you want to remove and delete it from the template. If you are unable to see the field, you may toggle field codes on or off by holding down the Alt key and pressing F9:

Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»

Your Ref:

1 June 2020

&
«CALCULATION_ADDRESS»

Dear &

RE: «MATTER MATTER DESCRIPTION»

I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

In any event, please confirm whether you require the balance due to you to be sent by way

Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID } { MERGEFIELD client_no } { MERGEFIELD matter_no }

Your Ref:

{ SET LETTER { DATE \@ "d MMMM yyyy" } } { ref LETTER \@ "d MMMM yyyy" } { MERGEFORMAT }

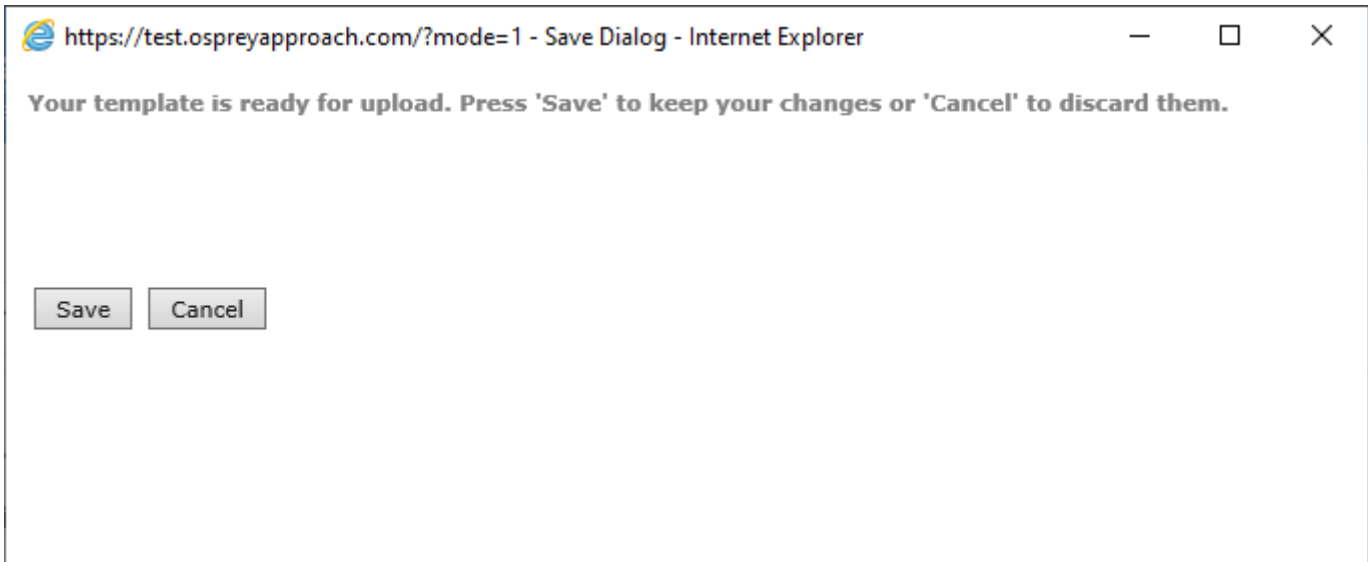
{ IF { MERGEFIELD LINKNAME_SURNAME_1 } = "" { MERGEFIELD LINKNAME_SURNAME_2 } { MERGEFIELD LINKNAME_TITLE_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 } } { IF { MERGEFIELD LINKNAME_SURNAME_2 } = "" { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 } } { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_2 } { MERGEFIELD LINKNAME_SURNAME_2 } } { MERGEFIELD CALCULATION_ADDRESS }

Dear { IF { MERGEFIELD "TK_CLPERSONAL_tk_SALUTATION" } = "" { IF { MERGEFIELD LINKNAME_SURNAME_1 } = "" { MERGEFIELD LINKNAME_SURNAME_2 } { MERGEFIELD LINKNAME_TITLE_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_SURNAME_1 } } { IF { MERGEFIELD LINKNAME_SURNAME_2 } = "" { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 } } { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 } and { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_SURNAME_2 } } } { MERGEFIELD "TK_CLPERSONAL_tk_SALUTATION" }

RE: { MERGEFIELD MATTER MATTER DESCRIPTION }



Once you have deleted the field from the template, and made any text changes required, close Word using the red X in the top right hand corner, and save your changes:



To unlink the field you have removed from the template, select the relevant Standard Document Fields radio button and Available Table, place a tick in the Link/Unlink box, and click Save:

Supervisor > Case Management Setup > Standard Documents > Standard Document:RCS Cli

Design Document Preview Document

STANDARD DOCUMENT FIELDS

Client Dossier Formula Client Dossier Ask Include Document CDS

Available Tables

MANAGE FIELDS

Save

LINK/UNLINK	FIELD	LINKED?	↓
<input checked="" type="checkbox"/>	TITLE_2	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	TITLE_1	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	SURNAME_2	<input checked="" type="checkbox"/>	

Linking Fields to Documents Using the Case Management App

Locating your document template

Navigate to Supervisor > Case Management Setup > Standard Documents. A list of all your available document templates will be displayed.

You can filter the list down using the options at the top left of the screen

Standard Documents

+ Add Standard Document

+ Add Current Document

Filter by:

Document Type: Standard

Work Type: ALL

Expert Type: None

Or, you can search for a specific template name using the search box in the top right corner:

Standard Documents

+ Add Standard Document

+ Add Current Document

Filter by:

Document Type: Standard

Work Type: ALL

Expert Type: None

Search box with magnifying glass icon

WORK ID	DESCRIPTION	EXPERT TYPE	RETENTION PERIOD	COPY TO CLIENT	COPY TO ASSOCIATE
FWRCP	_1 doc			N	N
FWRCP	_1 doc from browser			N	N
FWRCP	_doc from App			N	N

Linking fields to your document template

Right click on the document you wish to add fields to and select the Fields link button

Osprey Approach (1.0.1)

Today's Units: 0
 Today's Time: 00h:00m
 Today's Value: £0.00

Global search

00:00:44 / 0

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS +

TIME RECORDING +

CASE MANAGEMENT +

CLIENT LEDGERS

BANKS & JOURNALS +

REPORTS +

SUPERVISOR -

Standard Documents

Batch Aged Debtor Letters

Bill Template

Label Templates

Cheque Templates

Standard Documents

WORK ID	DESCRIPTION	EXPERT TYPE	RETENTION PERIOD	COPY TO CLIENT	COPY TO ASSOCIATE
DANCLN	Aa Client - Send Court Order	Client		N	N
GLOBAL	AAATest			N	N
COMP	Acknowledgement of Complaint			N	N
GLOBAL	Ad Hoc letter to any Contact			N	N
ADMLAW	Adam Buckley BHB test			N	N
GLOBAL	Address			N	N
AEH	Address 5 test			N	N
MH_WT1	Address field			N	N
WILLS	Address Test Document 2.0 Tom P			N	N
GLOBAL	Address_J			N	N
GLOBAL	0004 test			N	N
CNVW1	0001 Civil Current Document	Accountant		N	N
A_G	001 - Legal OA		1 year	A	A
GLOBAL	001 - Standard letter WEB			N	N
CONSAL	001 - Test Address 3			N	N

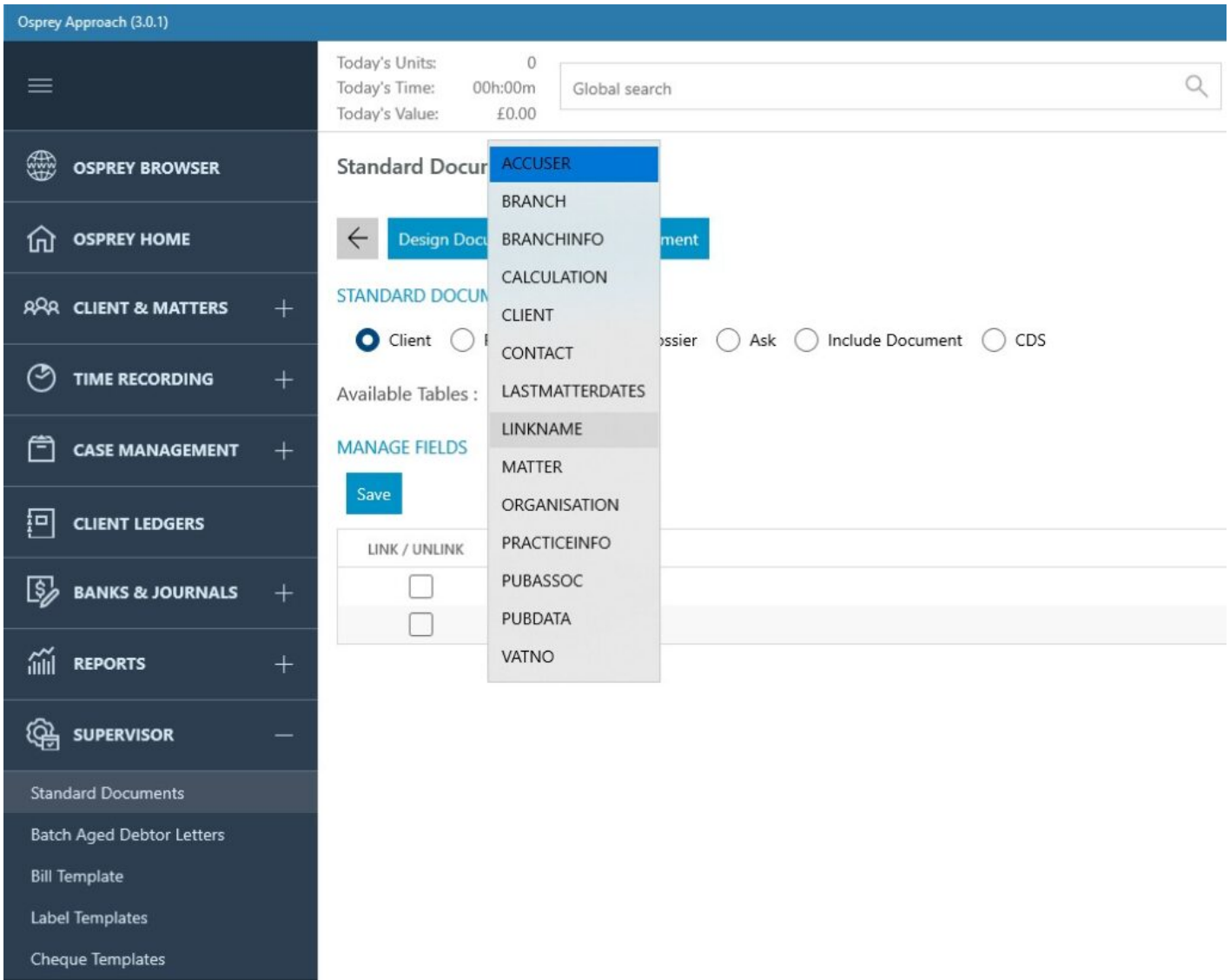
Use the radio buttons to select from the following table types:

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- Ask - contains all Ask fields created under Supervisor > Case Management Setup > Formulae > Asks
- Include Document - contains all header and footer include documents created under Supervisor > Include Documents
- CDS - contains all fields relating to Contract Work forms under Case Management

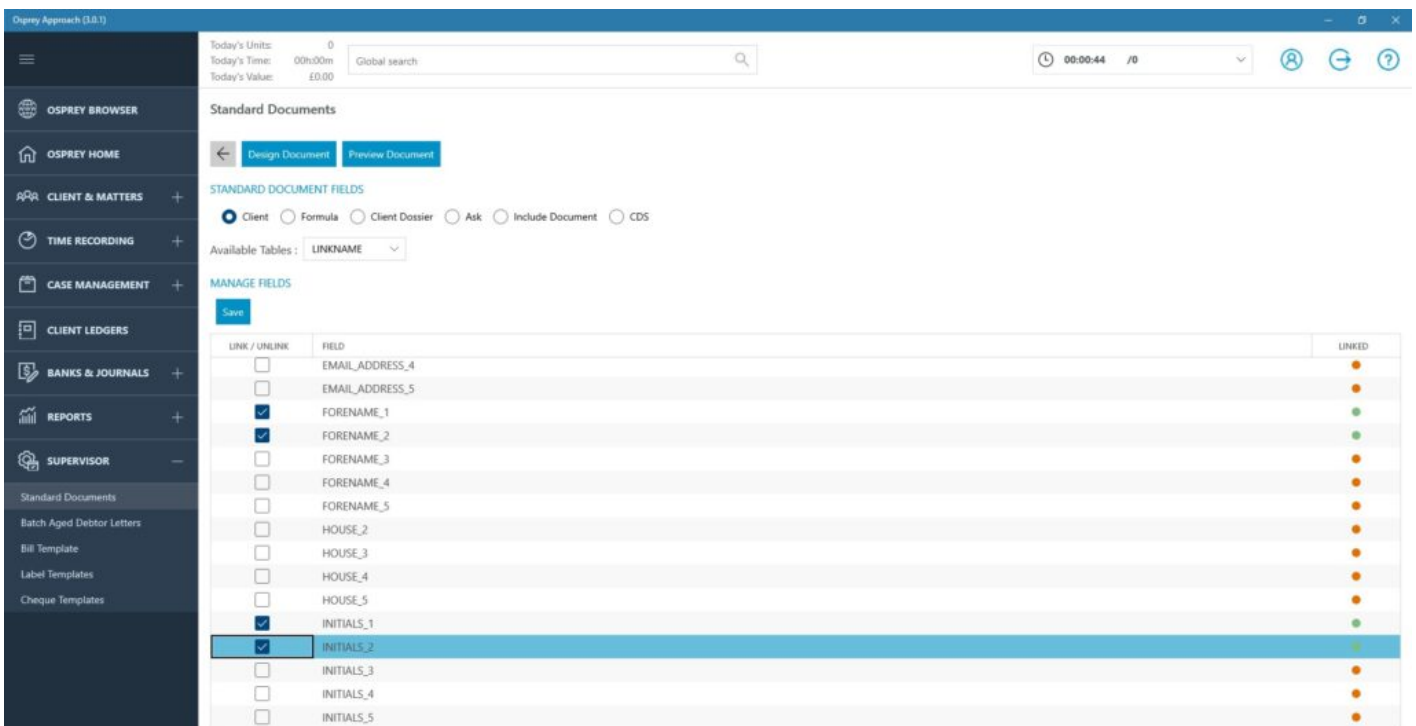
STANDARD DOCUMENT FIELDS

Client
 Formula
 Client Dossier
 Ask
 Include Document
 CDS

Now select the relevant table



Once you have selected the relevant table, the list of fields in this table will be displayed. Place a tick in the box alongside the fields you wish to link, and click Save.



Select Design Document:

Osprey Approach (3.0.1)

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

Standard Documents

← Design Document Preview Document

STANDARD DOCUMENT FIELDS

Client Formula Client Dossier Ask Include Document CDS

Available Tables : LINKNAME

Word will open the document template:

Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»

Your Ref:

1 June 2020

&
«CALCULATION_ADDRESS»

Dear &

RE: «MATTER MATTER DESCRIPTION»

I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

In any event, please confirm whether you require the balance due to you to be sent by way

You may toggle field codes on or off by holding down the Alt key and pressing F9:

Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»

Your Ref:

1 June 2020

&
«CALCULATION_ADDRESS»

Dear &

RE: «MATTER_MATTER_DESCRIPTION»

I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

In any event, please confirm whether you require the balance due to you to be sent by way

OUR REF: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no }

Your Ref:

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d MMMM yyyy" } MERGEFORMAT }

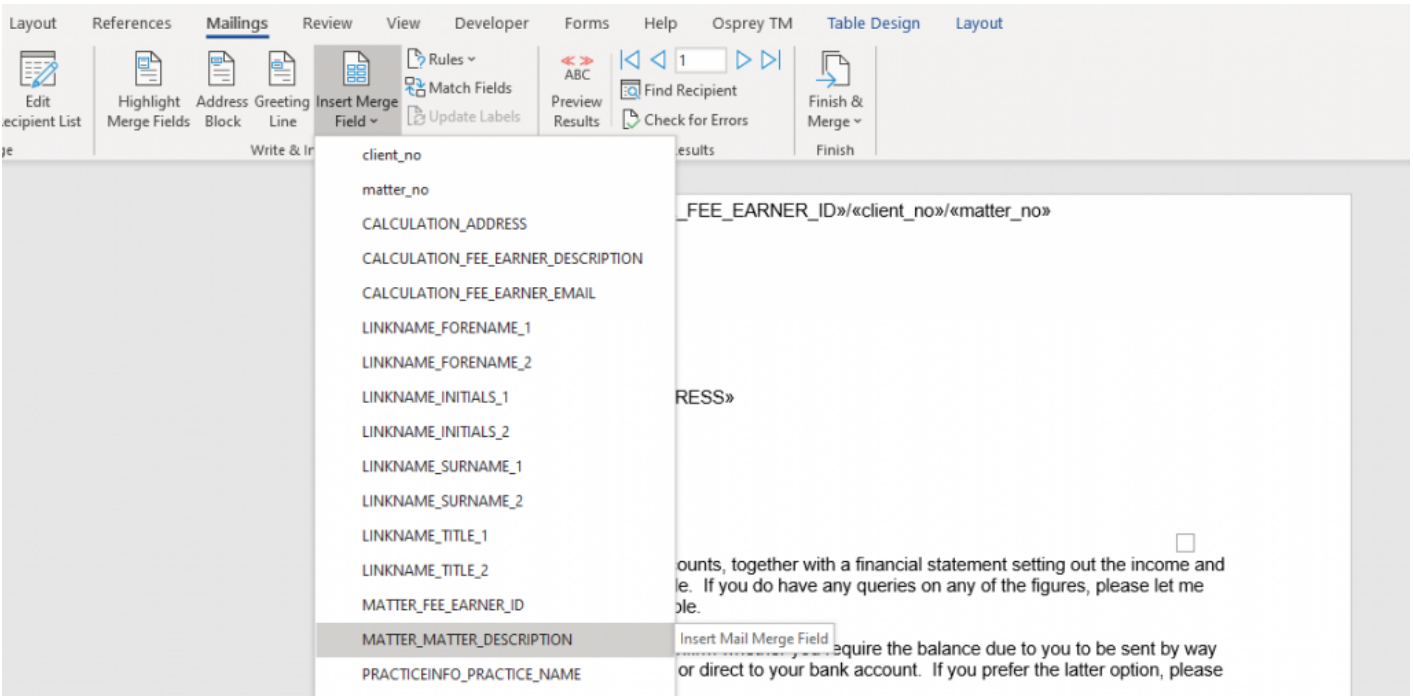
{ IF { MERGEFIELD LINKNAME_SURNAME_1 } = { MERGEFIELD LINKNAME_SURNAME_2 } { MERGEFIELD LINKNAME_TITLE_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 } " " { MERGEFIELD LINKNAME_SURNAME_2 } = "" { MERGEFIELD LINKNAME_SURNAME_1 } " " { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_1 } & { MERGEFIELD LINKNAME_SURNAME_1 } { MERGEFIELD LINKNAME_SURNAME_2 } { MERGEFIELD LINKNAME_INITIALS_2 } { MERGEFIELD LINKNAME_SURNAME_2 } } { MERGEFIELD CALCULATION_ADDRESS }

Dear { IF { MERGEFIELD "TK_CLPERSONAL.tk_SALUTATION" } = "" { IF { MERGEFIELD LINKNAME_SURNAME_1 } = { MERGEFIELD LINKNAME_SURNAME_2 } { MERGEFIELD LINKNAME_TITLE_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_SURNAME_1 } " " { MERGEFIELD LINKNAME_SURNAME_2 } = "" { MERGEFIELD LINKNAME_SURNAME_1 } " " { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_1 } & { MERGEFIELD LINKNAME_SURNAME_1 } { MERGEFIELD LINKNAME_SURNAME_2 } { MERGEFIELD LINKNAME_INITIALS_2 } { MERGEFIELD LINKNAME_SURNAME_2 } } " " { MERGEFIELD "TK_CLPERSONAL.tk_SALUTATION" } }

RE: { MERGEFIELD MATTER_MATTER_DESCRIPTION }



To link a new field to the document, position your mouse cursor in the place you would like the new field to appear, and from the Mailings menu tab select Insert Merge Field:



Once you have inserted all the required fields into the template, and made any text changes required, close Word using the red X in the top right hand corner, and save your changes

Osprey Approach (3.0.1)

Today's Limits: 0
 Today's Time: 00:00:00
 Today's Value: £0.00

Global search

00:00:44 / 0

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS

TIME RECORDING

CASE MANAGEMENT

CLIENT LEDGERS

BANKS & JOURNALS

REPORTS

SUPERVISOR

Standard Documents

Batch Aged Debtor Letters

Bill Template

Label Templates

Cheque Templates

Standard Documents

Design Document Preview Document

STANDARD DOCUMENT FIELDS

Client Formula Client Dossier Ask Include Document CDS

Available Tables: LINENAME

MANAGE FIELDS

Save

LINK / LINKLINE	FIELD	LINKED
<input type="checkbox"/>	EMAIL_ADDRESS_4	
<input type="checkbox"/>	EMAIL_ADDRESS_5	
<input checked="" type="checkbox"/>	FORENAME_1	
<input checked="" type="checkbox"/>	FORENAME_2	
<input type="checkbox"/>	FORENAME_3	
<input type="checkbox"/>	FORENAME_4	
<input type="checkbox"/>	FORENAME_5	
<input type="checkbox"/>	HOUSE_2	
<input type="checkbox"/>	HOUSE_3	
<input type="checkbox"/>	HOUSE_4	
<input type="checkbox"/>	HOUSE_5	
<input checked="" type="checkbox"/>	INITIALS_1	
<input checked="" type="checkbox"/>	INITIALS_2	
<input type="checkbox"/>	INITIALS_3	
<input type="checkbox"/>	INITIALS_4	
<input type="checkbox"/>	INITIALS_5	

Save Dialog

Your template is ready for upload. Press 'Save' to keep your changes or 'Cancel' to discard them.

Save Cancel

I'm Poit, your virtual assistant! Please, tell me what you want to do...

Removing Linked Fields from a Document

To remove linked fields from a document, you will need to click "Design" on the document so that it is open in Word and then delete the field. Once this has been done you will be able to untick the field from the field linking screen and clicking Save.