



Osprey Approach: Linking Fields to your Standard Documents

This help guide was last updated on
Aug 6th, 2024

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

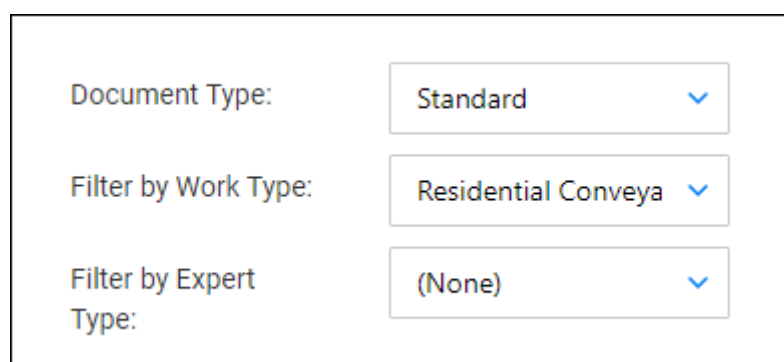


This guide explains how to link and unlink fields from your standard documents to include any information which you store within Osprey

Locating your document template

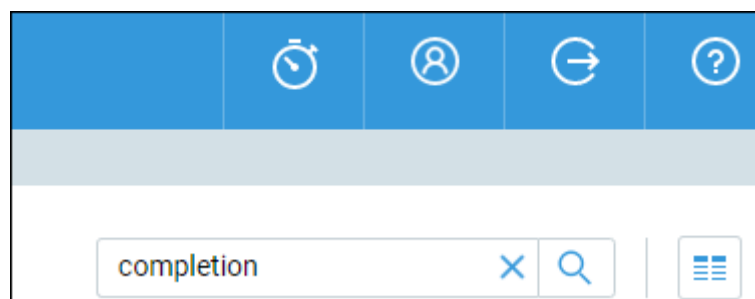
Navigate to Supervisor > Case Management Setup > Standard Documents. A list of all your available document templates will be displayed.

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



A screenshot of a filter panel with three rows. Each row has a label on the left and a dropdown menu on the right. The first row is labeled 'Document Type:' and has a dropdown showing 'Standard' with a blue downward arrow. The second row is labeled 'Filter by Work Type:' and has a dropdown showing 'Residential Conveya' with a blue downward arrow. The third row is labeled 'Filter by Expert Type:' and has a dropdown showing '(None)' with a blue downward arrow.

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



A screenshot of the top navigation bar and search area. The navigation bar is blue and contains four icons: a clock, a person, a right arrow, and a question mark. Below the navigation bar is a light gray horizontal bar. At the bottom is a white search box containing the text 'completion'. To the right of the search box are three icons: a blue 'x' to clear the search, a magnifying glass to execute the search, and a list icon (three horizontal lines) to toggle the search results view.

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:

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

Supervisor

Case Management Setup

Standard Documents

Standard Document:RCS Cli C

Design Document

Preview Document

STANDARD DOCUMENT FIELDS

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

Available Tables

ACCUSER

CALCULATION

CLIENT

CONTACT

LASTMATTERDATES

LINKNAME

MATTER

ORGANISATION

MANAGE FIELDS

Save

LINK/UNLINK	FIEL		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



Save

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»

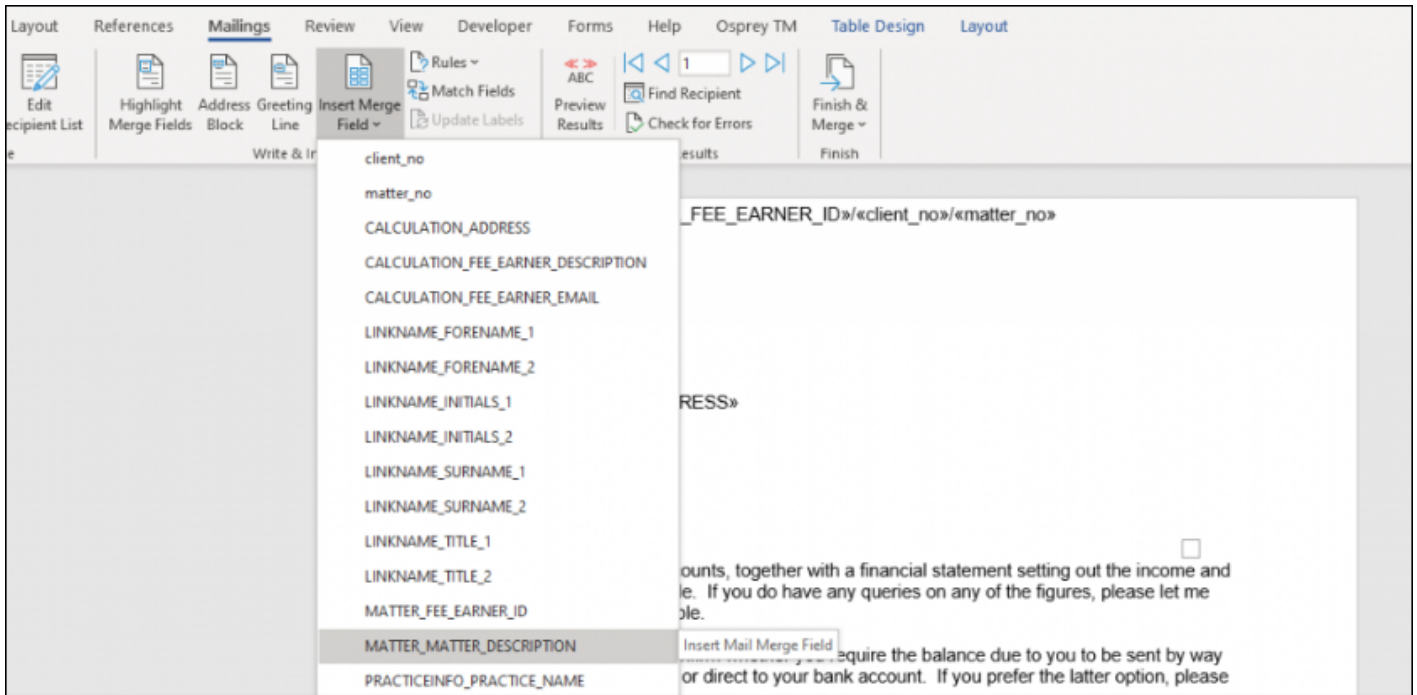
I enclose this firm's accounts, together with a financial statement setting out the income and expenditure on your sale. If you do have any queries on any of the figures, please let me know as soon as possible.

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

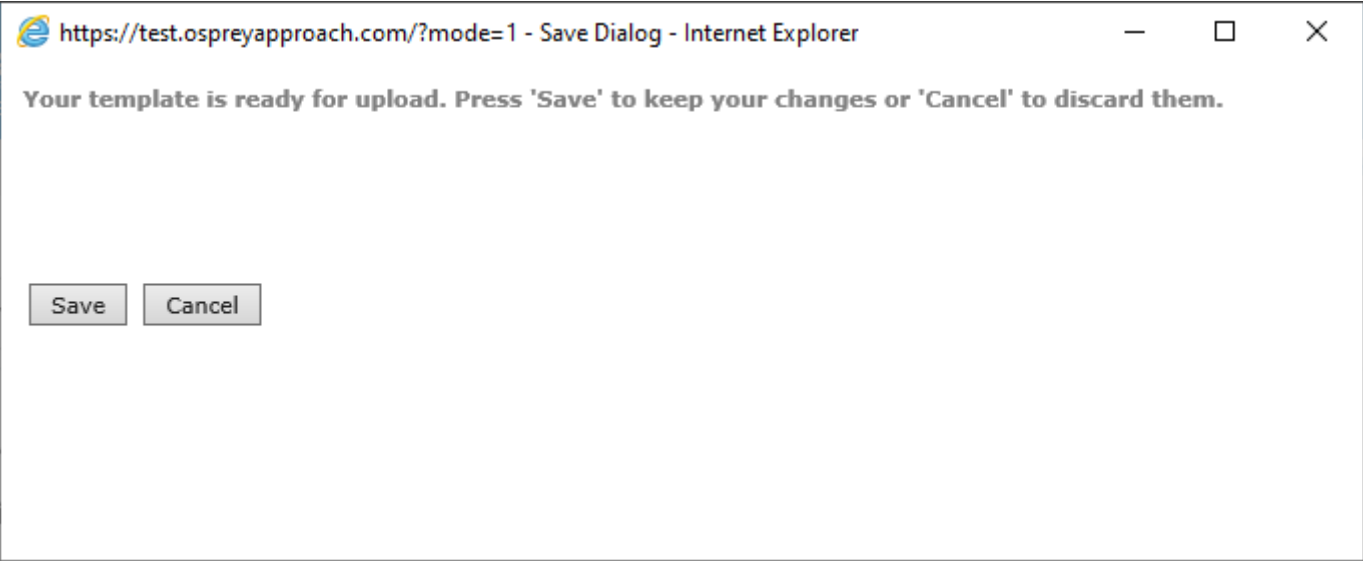
You may toggle field codes on or off by holding down the Alt key and pressing F9:

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_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 } }
Dear &	Dear { IF { MERGEFIELD "TK_CLPERSONAL_IK_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 } } }
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	

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:



Locating your document template

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:

<p>Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»</p> <p>Your Ref:</p> <p>1 June 2020</p> <p>&</p> <p>«CALCULATION_ADDRESS»</p> <p>Dear &</p> <p>RE: «MATTER MATTER DESCRIPTION»</p> <p>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.</p> <p>In any event, please confirm whether you require the balance due to you to be sent by way</p>	<p>Alt + F9</p>	<p>Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no }</p> <p>Your Ref:</p> <p>{ SET LETTER{ DATE \@ "d MMMM yyyy" } }(ref LETTER \@ "d MMMM yyyy" \ MERGEFORMAT }</p> <p>{ 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_SURNAME_1 }" "{ IF { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 }" "{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 }" { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_SURNAME_1 } { MERGEFIELD LINKNAME_SURNAME_2 }" } { MERGEFIELD CALCULATION_ADDRESS }</p> <p>Dear { IF { MERGEFIELD "TK_CLPERSONAL_IK_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_SURNAME_1 }" "{ IF { 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_IK_SALUTATION" }" }</p> <p>RE: { MERGEFIELD MATTER MATTER DESCRIPTION }</p>
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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:


<https://test.ospreyapproach.com/?mode=1> - Save Dialog - Internet Explorer

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

Save

Cancel

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 Cl

Design Document
Preview Document

STANDARD DOCUMENT FIELDS

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

Available Tables
LINKNAME

MANAGE FIELDS

Save

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

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

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

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 BHS 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_1			N	N
GLOBAL	00004 test			N	N
CWV1	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:

- 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

STANDARD DOCUMENT FIELDS

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

Now select the relevant table

Osprey Approach (3.0.1)

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

Global search

Standard Document

Design Document

STANDARD DOCUMENT

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

Available Tables :

MANAGE FIELDS

Save

LINK / UNLINK

ACCUSER
BRANCH
BRANCHINFO
CALCULATION
CLIENT
CONTACT
LASTMATTERDATES
LINKNAME
MATTER
ORGANISATION
PRACTICEINFO
PUBASSOC
PUBDATA
VATNO

Standard Documents

Batch Aged Debtor Letters

Bill Template

Label Templates

Cheque Templates

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.

Osprey Approach (3.0.1)

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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

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

00:00:44 / 0

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↺

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Standard Documents

←

Design Document

Preview Document

STANDARD DOCUMENT FIELDS

☒ Client

☐ Formula

☐ Client Dossier

☐ Ask

☐ Include Document

☐ CDS

Available Tables : LINKNAME

MANAGE FIELDS

Save

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

Select Design Document:

Osprey Approach (3.0.1)

☰

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS

TIME RECORDING

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:

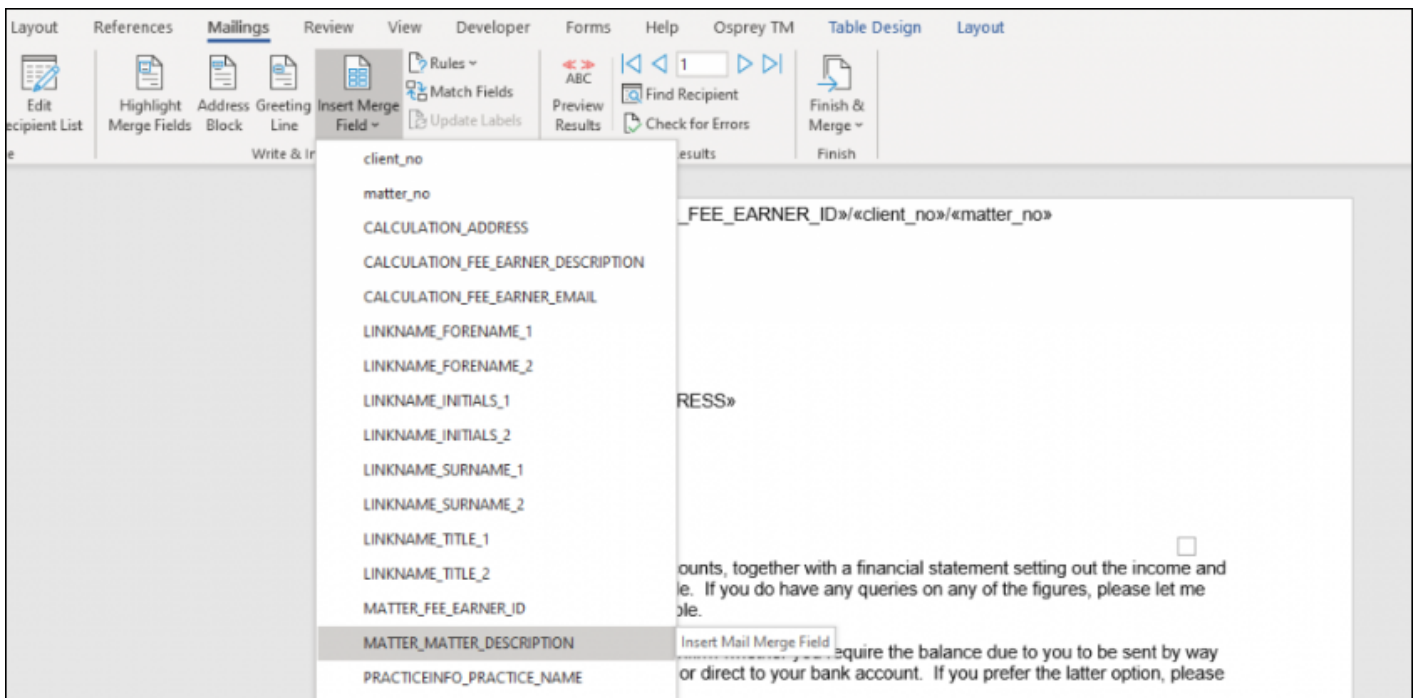
Our Ref: «MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»	Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID } { MERGEFIELD client_no } { MERGEFIELD matter_no }
Your Ref:	Your Ref:
1 June 2020	{ SET LETTER { DATE \@ "d MMMM yyyy" } } { ref LETTER \@ "d MMMM yyyy" } \ MERGEFORMAT }
& «CALCULATION_ADDRESS»	{ IF { 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_SURNAME_1 } " { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 } & { MERGEFIELD LINKNAME_TITLE_2 } { MERGEFIELD LINKNAME_INITIALS_2 } { MERGEFIELD LINKNAME_SURNAME_2 } " } }
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" } }
<u>RE: «MATTER MATTER DESCRIPTION»</u>	<u>RE: { MERGEFIELD MATTER MATTER DESCRIPTION }</u>
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	



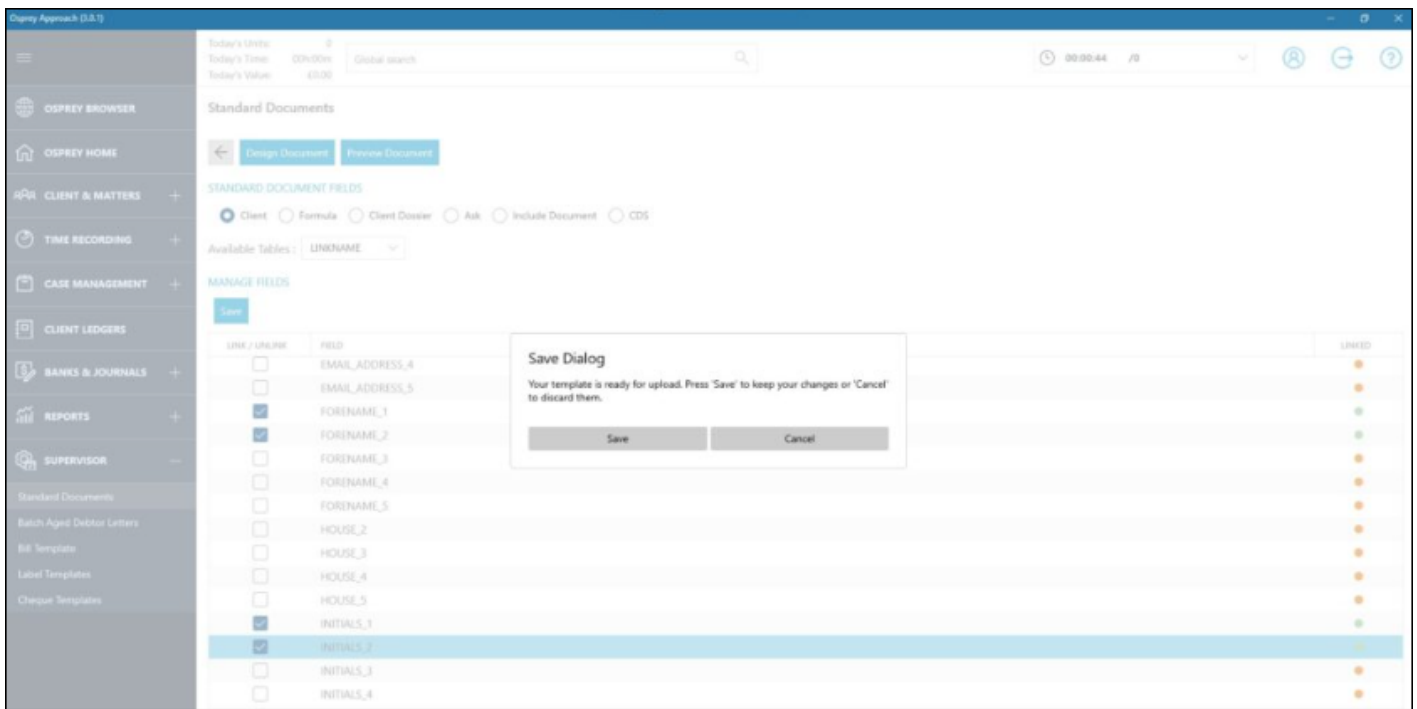
 Alt + F9



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 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.