

# 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:

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:

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### 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) 🗸	
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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

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Now choose from the available tables:

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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.

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	WORK_ID	•	
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### Select Design Document:

Supervisor	Case M	anagement Setup	Standard Documents	Standard Document:RCS
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Word will open the document template:

Our Ref:	<b>«MATTER</b>	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:

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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:

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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:

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Your template is ready for upload. Press 'Save' to keep your changes or 'Cancel' to dis	card th	em.	
Save Cancel			

# 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	A = 11
TK_RCS	RCS Cli Confirm Completion TK_RCS	Edit
TK_RCS	RCS Completion Statement TK_RCS	P Fields
TK_RCS	RCS Sol Confirm Completion TK_RCS	E-mails
		£ Rate

#### Select Design Document:

Supervisor	Case M	anagement Setup	Standard Documents	Standard Document:RCS
C Design Do	ocument	Preview Doct	ument	

#### Word will open the document template:

Our Ref:	«MATTER_FEE_EARNER_ID»/«client_no»/«matter_no»
Your Ref:	
1 June 2020	)
& «CALCULA	TION_ADDRESS»

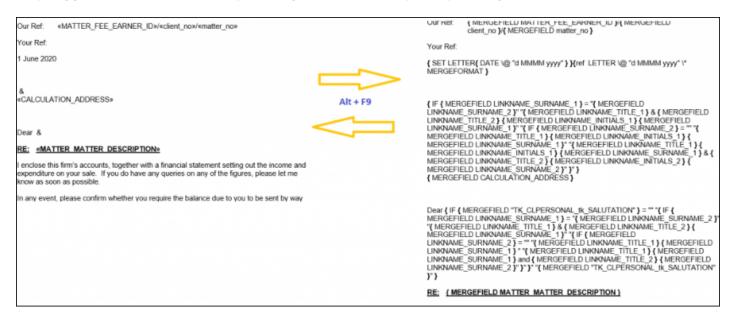
Dear &

### 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:



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	-		×
Your template is ready for upload. Press 'Save' to keep your changes or 'Cancel' to dis	card th	em.	
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:

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	TITLE_1	•
	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 Docu	ments			
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Filter by:				
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Work Type:	ALL		2	/
Expert Type:	None		~	/

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

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### Linking fields to your document template

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

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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

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#### Now select the relevant table

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Batch Aged Debtor Letters		
Bill Template		
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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.

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	Contemporary Contemporary Preview Document
ନ୍ୟର client & matters +	STANDARD DOCUMENT FIELDS
	O Client ○ Formula ○ Client Dossier ○ Ask ○ Include Document ○ CDS
TIME RECORDING +	Available Tables : LINKNAME $\sim$

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:

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Your Ref:	Your Ref:
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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:

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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

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### **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.