

Osprey Approach: Using Include Documents to Populate Headers & Footers

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The latest version is always online at
<https://support.ospreyapproach.com/?p=853>

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The Osprey Approach Include Documents function allows you to upload your header and footer into your Osprey documents and then update them all in one go where the uploaded headers or footers are stored should the need arise.

This means that any of your off-site workers can also produce letters, since the headers and footers are stored on the Osprey server, rather than on your own local machines.

Each of the include documents can be linked to a branch, so that each of your branches may have a different header on their letters.

IMPORTANT: You must have your header and footer saved locally to upload them to the Include Documents area. The details must also be in the MAIN BODY of the document to be uploaded.

Graphic in Main Body of Document:



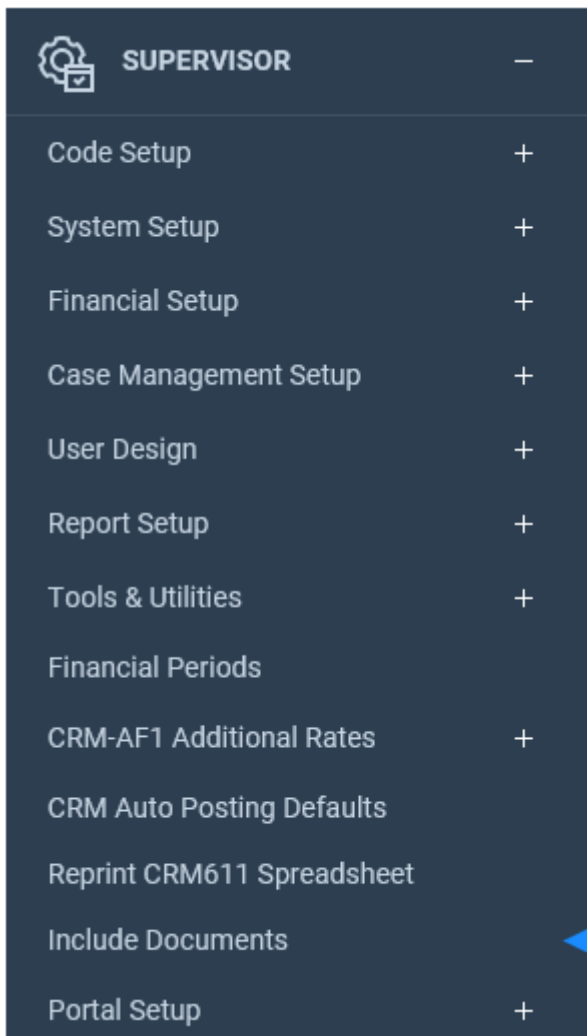
Graphic in Header of Document:



Add a new Include Document

Once your header or footer document is saved locally, go to the Supervisor area of Osprey and then select Include Documents.

Please note that only users with Supervisor level access will be able to add or edit Include Documents.



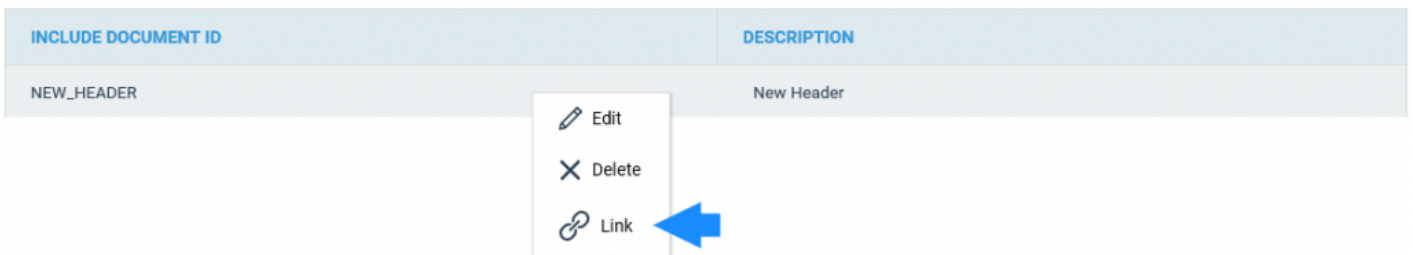
Now select the 'New' link at the top of the screen.



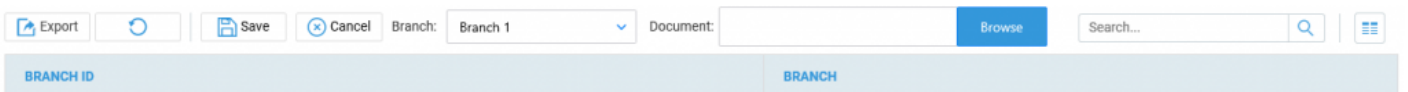
You will now be asked to enter an ID and Description for your document. In this example, we will add a new header. Select 'Save' when you have completed these details.

The screenshot shows two buttons: 'Save' (with a floppy disk icon) and 'Cancel' (with a red X icon). Below these is a form with two input fields. The first field is labeled 'Include Document ID:' and contains the text 'NEW_HEADER'. The second field is labeled 'Description:' and contains the text 'New Header'.

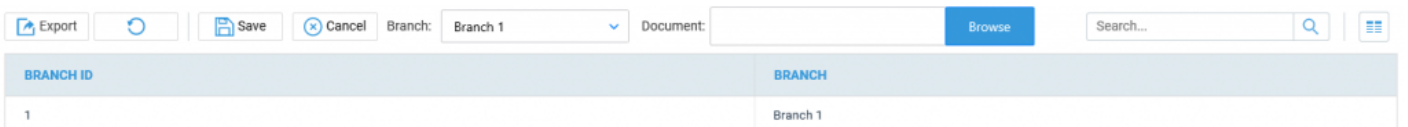
Your new header will now be visible on the Include Document screen. Now right-click on it and select the 'Link' icon, as highlighted below.



You will now be asked to select a branch. If you have just one branch, or you wish to use the same header/footer for all branches, this can be left as default.



Once a branch has been chosen, select the 'Browse' to open an explorer window. Select your header/footer from here and the 'Document' area should now display the relevant file path.

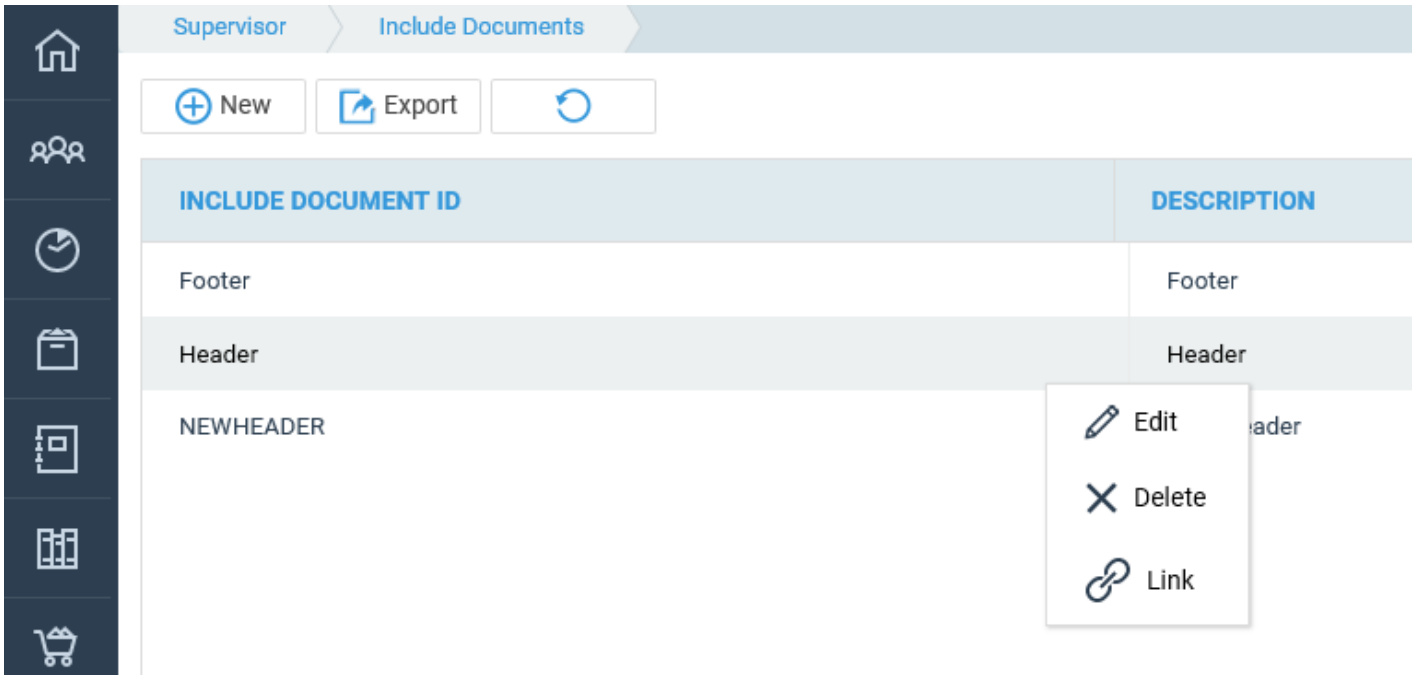


Click the 'Save' icon to add the document.

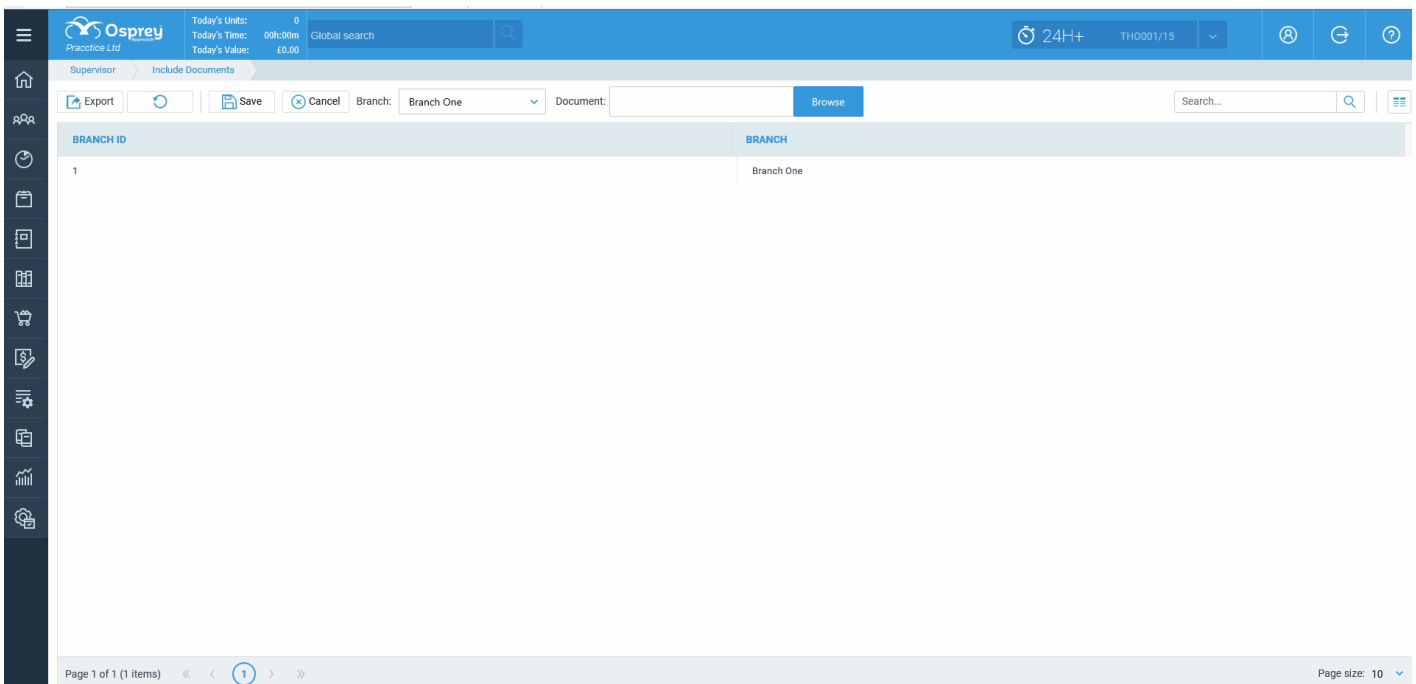
Once added, you can use the 'View' icon to ensure that the header has been uploaded correctly should you wish.

Edit an existing Include Document

Navigate to Supervisor > Include Documents. Right click the document you wish to overwrite, and select Link.



To download a copy of the existing document, right click on the relevant branch, and select View. Choose whether to Open or Save the document.



Click to enlarge

To overwrite the Include Document, select the branch you wish to overwrite in the top section of the screen, then Browse to the folder that has your new document in it. Select the document, and then click Save. You should see a message advising that The selected branch content has been overwritten.

Osprey
Broom & Broom Ltd
Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00
Global search
24H+ / 0
Supervisor
Include Documents
Export Save Cancel Branch: Hereford Document: Browse Search...
BRANCH ID BRANCH
1 Hereford
Page 1 of 1 (1 Items) Page size: 10

Click to enlarge


Linking your Include Document to your standard documents


Navigate to the Standard Documents area available under the Supervisor > Case Management Setup menu as shown here to bring up a list of all available documents on the system.


SUPERVISOR
Code Setup
System Setup
Financial Setup
Case Management Setup
KPI Details
Debt Recovery
Expert Types
Key Date Types
Formulae
Standard Documents
Workflows


Locate the document you wish to add your header/footer to and right-click on it. Now select the option for 'Fields' as highlighted below.

WORK ID	DESCRIPTION	EXPERT TYPE	COPY TO CLIENT	COPY TO ASSOCIATE
TK_Pi	Blank Def 1 Sol Letter TK_Pi	Solicitor	N	N
TK_Pi	Blank Def 2 Sol Letter TK_Pi	Solicitor	N	N
TK_Pi	Blank Def 3 Sol Letter TK_Pi	Solicitor	N	N

 Edit

 Fields

 E-mails

 Rate

The letter overview will now open. You will have a series of radio buttons along the top which will allow you to select an area from which to choose fields to link into the document. Select the 'Include Document' button to bring through your header.

STANDARD DOCUMENT FIELDS

Client
 Dossier
 Formula
 Client Dossier
 Ask
 Include Document
 CDS

Available Tables

MANAGE FIELDS

 Save

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

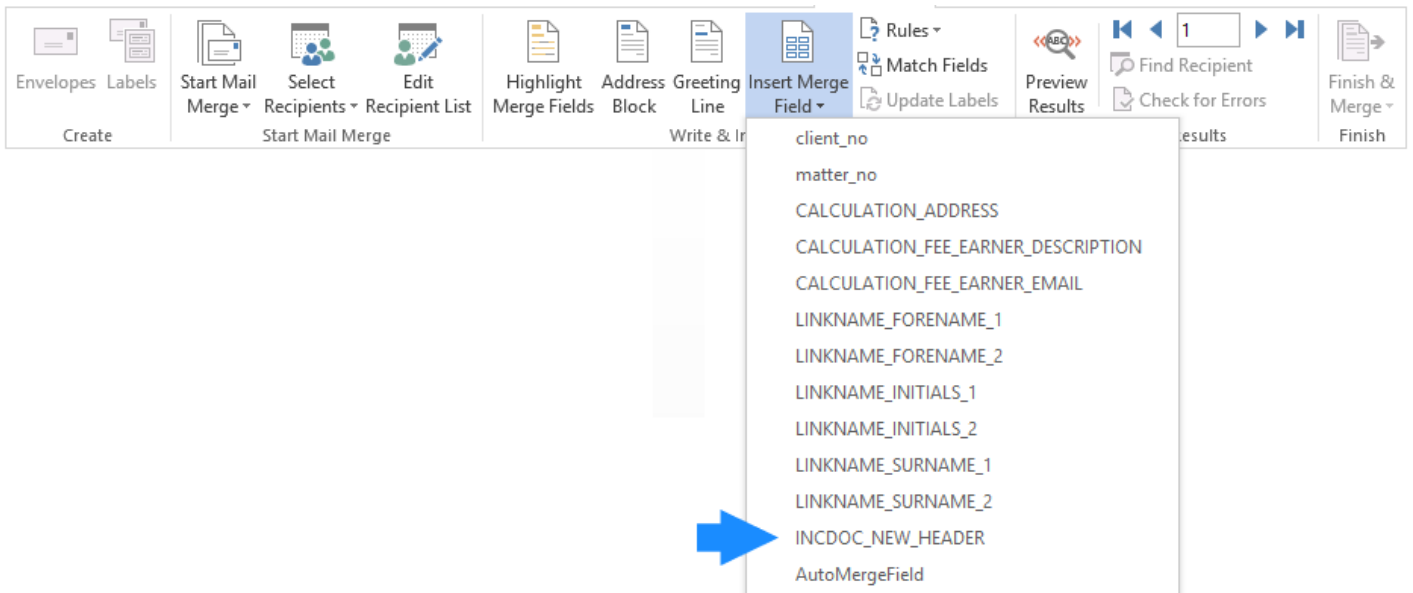
Now place a tick in the 'Link/Unlink' box and then click the 'Save' icon. The field should now show a green dot to denote that it has been successfully linked.

LINK/UNLINK	FIELD	LINKED?
<input checked="" type="checkbox"/>	NEW_HEADER	●

Once linked, you may now select the 'Design Letter' option at the top of the screen to open up your Word document.

Access the document header, either by double-left clicking on it, or by going to the 'Insert' tab and selecting 'Footer', then clicking on 'Edit Footer'.

Once the mouse cursor is present in the header, go to the 'Mailings' tab and then select 'Insert Mergefield' to bring up a list of fields which have been linked to this document. Your header field will be present at the foot of this list.



Clicking this will insert the header into your document as shown here.

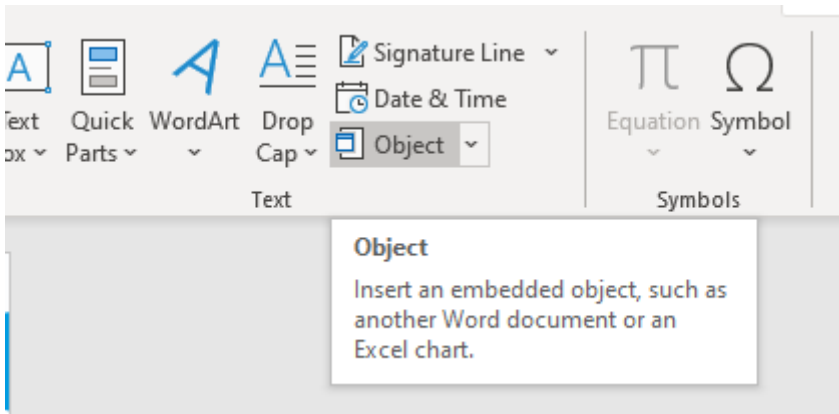


Now close the document using the X in the top-right corner and select 'Save'. You may now preview the document to ensure that the header appears as needed. The above process can also be repeated for any footers which need to be included.

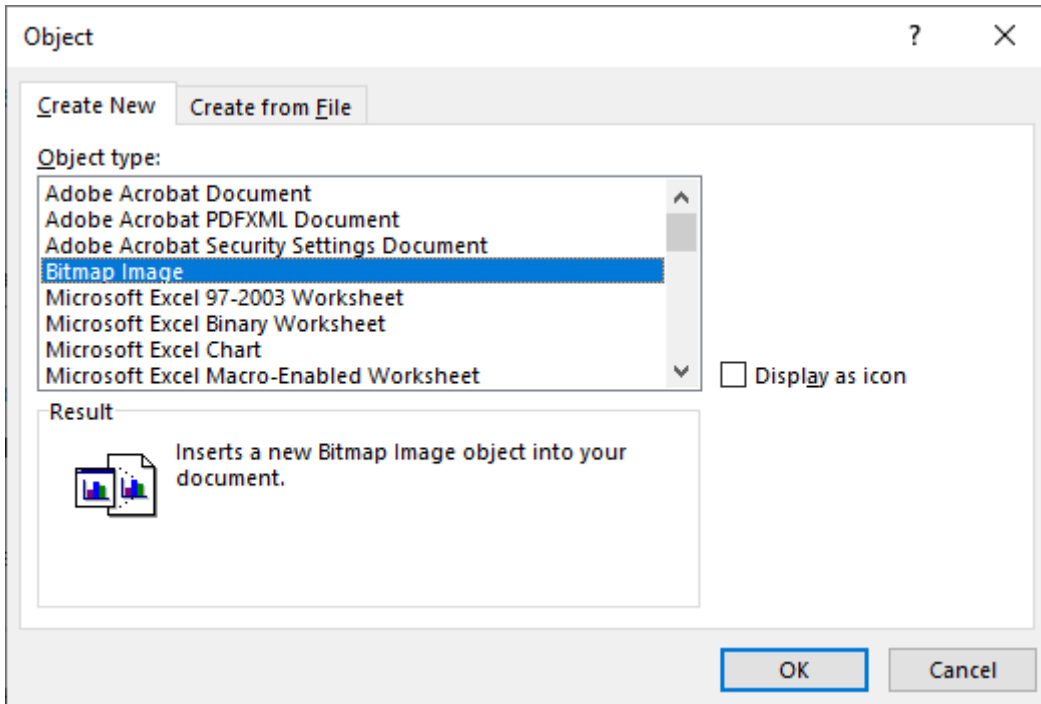
Troubleshoot Images in Headers and Footers

You may find that when using the Online Editor, or the Case Management App, your header and footer images do not show. This is due to differences in the way that the images are shown across the different technologies. To resolve this, you can amend your header/footer include documents to embed the images in a table.

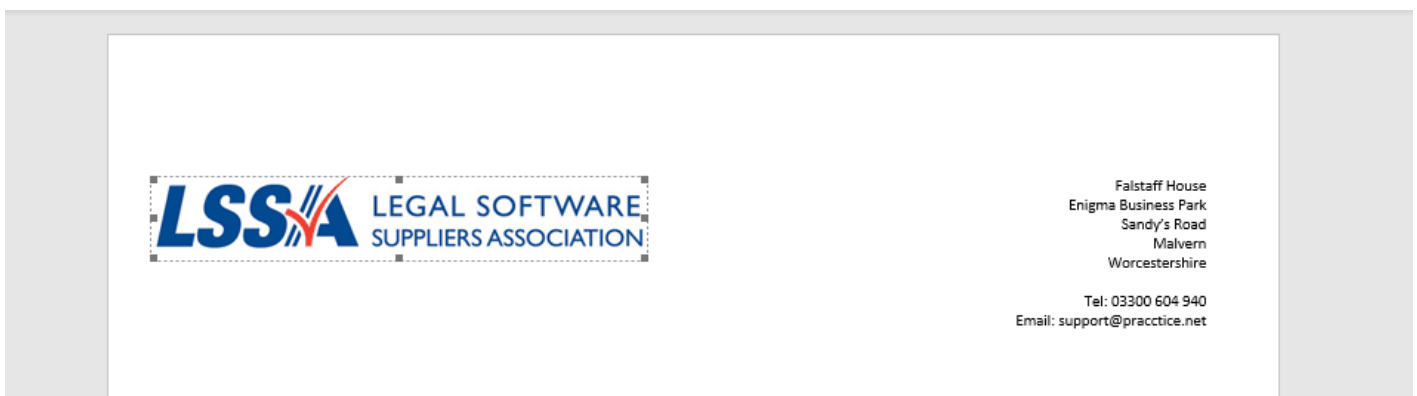
- Navigate to Supervisor > Include Documents.
- Right click the Include Document you want to amend, and click the Link option.
- Select the branch header or footer you want to amend, right click and View – this will download a local copy of your document.
- In the document, insert a table, and set it to have no borders.
- In the table cell where you want the image to appear, select Insert > Object:



- And then choose Bitmap Image:



- The Paint program will open. Copy and paste your graphic into this window, then close it:



- Save your changes locally, then upload the Include Document, overwriting the old one. To do this, from Supervisor > Include Documents, right click the document you want to overwrite and select Link.
- Choose the branch you want to overwrite, browse for your recently saved document, and then select Save:

Supervisor Include Documents

Export Save Cancel Branch: Malvern Document: TestHeader.doc Browse

BRANCH ID	BRANCH
2	Malvern
3	London Userid:647017728125

The Online Editor now displays the graphics when the document is run:

https://test.ospreyapproach.com/main/ViewDocument.aspx?docId=GLOBAL_133&docName=Mitzi Testing H - Internet Explorer

File Home Insert Page Layout Mail Merge View Review

Save Print

Common

1 2 3 4 5 6 7

Yours sincerely

Osprey Approach Test

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