

Osprey Approach: Add Formula Fields to Oyez Forms

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The latest version is always online at
<https://support.pracctice.com/?p=841>

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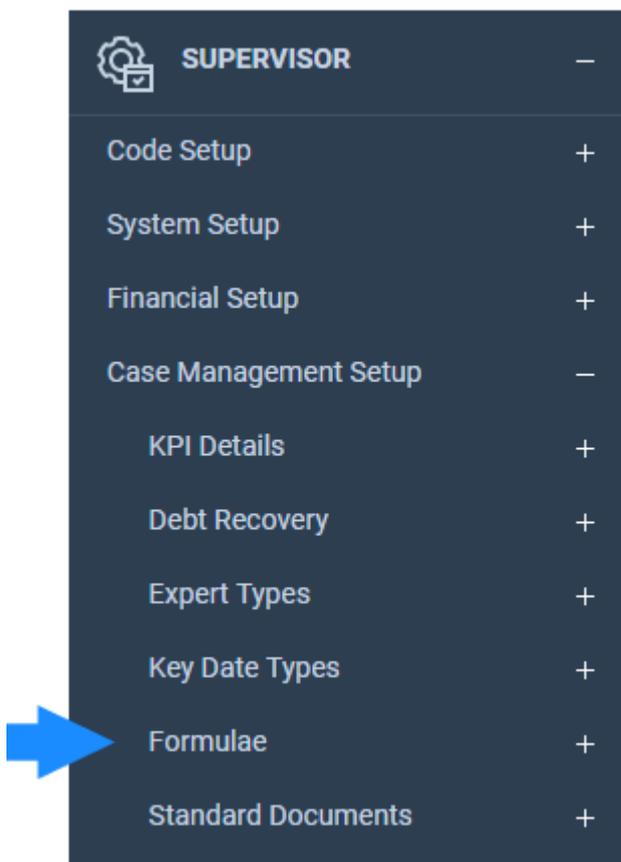


Osprey Approach offers integration with Oyez, allowing you to run Oyez forms through Osprey Approach. You may also use formula fields to bring data through to your Oyez form.

Please note that you must hold an active licence with Oyez and your individual users must have the desktop version of Oyez installed with the forms library available on the local machine. You must also be using the latest version of Internet Explorer.

Step 1

To add a formula to your Oyez Forms, first go to the **Supervisor** area and then select **Case Management Setup**. Then select **Formulae** as shown here.



Now select **Add Formula – Edit**. This will bring up a list of formulae currently saved in Osprey. Enter an appropriate name and description for your Formula as below.

 Save

 Cancel

DETAILS

Formula Name:

Test

Description:

Test

In Use:

Set as default for branch

(Please note that the **Formula Name** field is the unique ID of this formula and cannot contain spaces or special characters).

Step 2

Now in the bottom half of the screen, select an area of Osprey from which to select the fields required.

In the example below, I have selected **Client Pages**. Then choose a relevant page from which to bring through the data. I have chosen **CLIENT**.

FILTER FIELDS

Type:

Client Pages Dossier Pages Ask Statements

Page:

CLIENT 

The lower part of the screen will now show you a list of functions and available fields, which will contain a list of fields available on this particular page.

FORMULA

Function Categories:
DateTime

Functions:
Date
DateOnly
Day

Operators:
Add
Close paranthesis
Concatenate

Fields:
AREA
COUNTY
GROUP_CODE
HOUSE
POSTAL_TOWN

Formula Editor:

Step 3

Simply left-click on one of these fields to add it to the Formula Editor. You may then add another field if required.

In this example, I have added the town and postcode.

Formula Editor:

`{!CLIENT.POSTAL_TOWN} {!CLIENT.POSTCODE}`

Once you have added your formula, click the **Validate** button to ensure that the formula is valid.

The below message should appear.

Step 4

Now select the **Save** button at the top right of your screen to save this formula. You will now be returned to your formula list.

We will now link this field into our Oyez Form.

Step 5

Go to the **Supervisor** area and then select **Case Management Setup**. Then select **Standard Documents** and then **Oyez Forms**.

From your list of forms, click on the **Fields** icon which corresponds to the form you wish to add the formula field to.

In this example, I will use the **Application to Change the Register** form under the **Conveyancing** category as highlighted below.

Filter by Work Type

1 2 3 4

OYEZ CATEGORY NAME	OYEZ FORM NAME	DESCRIPTION	EDIT	FIELDS	DELETE
Children Act	Application	106 Oyez 1.Children Act-2			
Children Act	Application for an Order -[CA1]	GLOBAL Oyez 1: Children Act -1			
Conveyancing	Transfer of whole of registered title(s)	Transfer of whole of registered title			
Divorce	Application for a Decree Nisi/Conditional Order or (Judicial) Separation Decree/Order - D84	Application for an Order - CA1			
Conveyancing	Application to change the register	Application to change the register			



Step 6

The form overview will now appear. Select the field in which you wish the information to appear from the **Oyez Form Fields** drop-down list. I will select **Property_Add_Full**.

Then select the **Formula** radio button from the available list. This will give you a list of available formula to place into your form. Click **Save** once you have chosen a formula.



Work Type: Residential Conveyancing Sale
 Oyez Categories: Conveyancing
 Oyez Forms: Application to change the register
 Description: Application to change the register
 Oyez Form Fields:

Client Dossier Client Dossier CDS Formula

Available Fields:

MANAGE FIELDS

TABLENAME	FIELDID	FORMULAID	OYEZFORMFIELDID	DELETE
		Test_RW	Property_Add_Full	

Step 7

Once saved, go to your **Case Management** tab and then select **Oyez Forms**. Select a relevant client to bring through a list of forms corresponding to their work type.

CLIENT & MATTER SEARCH ▾

[Client Search](#) | [Dossier Search](#) | [CRM Search](#) | [Send e-mail](#) | [Client Dossier](#)

Client No:	<input type="text" value="CA0001"/>	<input type="button" value="Load Client/Matter"/>
Matter No:	<input type="text" value="1"/>	
Name:	<input type="text" value="Caldicott"/>	<input type="button" value="Search"/>
Matter:	<input type="text" value="Purchase of 14 Hamilton Road, Wellington, Shropshire"/>	<input type="button" value="Search"/>

OYEZ CATEGORY NAME	OYEZ FORM NAME	DESCRIPTION
Conveyancing	Transfer of whole of registered title(s)	Transfer of whole of registered title (s)

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Now select your form. Upon opening, the data will be placed into the form at the relevant position as highlighted below.

3 The application affects

the whole of the title(s)

part of the title(s) as shown:

Leamington Spa CV76 6SN