



Osprey Approach: Run Lexis Smart Forms

This help guide was last updated on
Dec 22nd, 2022

The latest version is always online at
<https://support.ospreyapproach.com/?p=581>



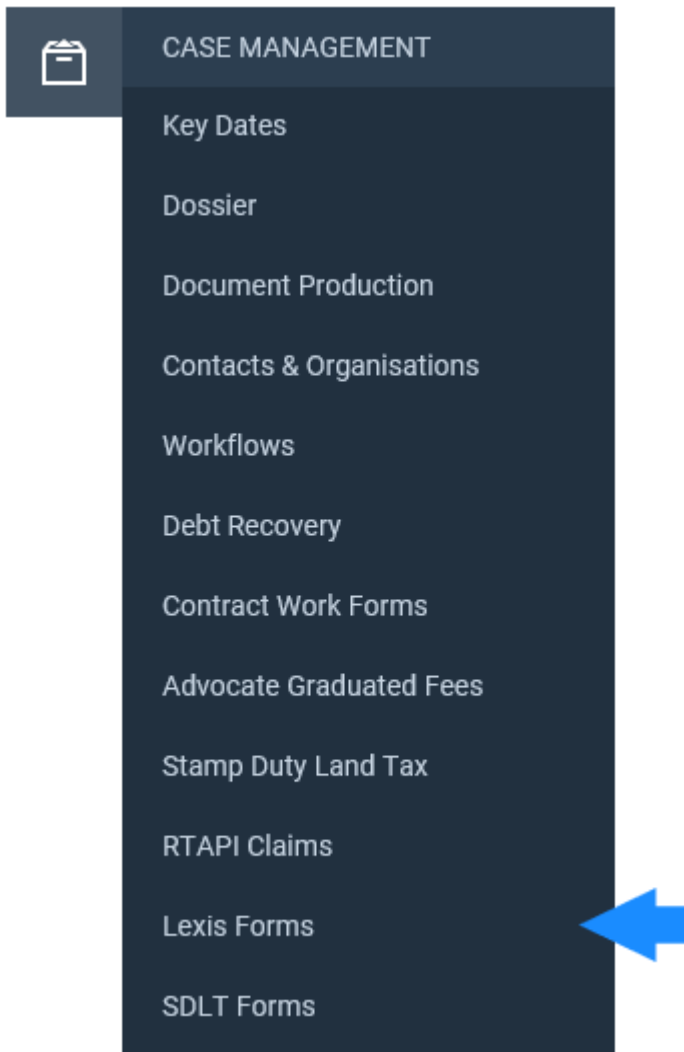
Osprey Approach offers integration with Lexis Nexis Smart Forms, allowing you to run their library of legal forms through Osprey.

Please note that you must have an account with Lexis Nexis and will require Adobe Reader to be set as your default PDF viewer to view the forms.



The Lexis Nexis integration can also be used through our Windows, Android and iOS apps! These apps are available to download from the relevant stores.





Under the 'Case Management' tab, you will have an option for 'Lexis Forms'.






Select this to view your Lexis Smart Forms. You will see a list of Lexis Smart Forms relevant to the kind of work you are doing. If any forms are missing, please speak to your system supervisor who will be able to easily add them to the list.

Client No: F00004   Load Client/Matter





Matter No: 1 

Name: Fox 





Matter: Purchase of Flat 9, Marches Avenue, Nuneaton 

 Export 

LEXIS FORM	DESCRIPTION
lrp1.pdf	AP1 - Application to Change the Register


Page 1 of 1 (1 items)    Page size: 10 


Left click on the Lexis Smart Form to automatically save a copy to your matter history ready for printing or distributing.


 https://demo.ospreyapproach.com/?mode=7&docId=D2DD73A9882668A&clientNo=F00004&matterNo=1&docume - ...   

Your document is ready for save and merge. Press 'Save' to create or 'Cancel' to discard them.

File Description:

Folder: 

Retention Period: 

Retention Date: 


Please refresh matter history to view your changes.


Automatic Time Record (Untick to enter time recording manually)

You can amend the description and assign the form to a folder if you wish, as well as set a retention period if required.

Select 'Save' to add the form to the Matter History.

Upon saving a form for the first time, this message will appear advising that the form has been saved into your matter history.

Lexis Forms 

 Your document has been saved successfully in Matter History.

Do not show this message anymore

Tick the available box to prevent the message from being shown again if you wish. Now navigate to your Matter History. The form which has just been saved will appear at the top of the list.

FAVORITE	TYPE	REF NUMBER	CLIENT NO	CLIENT SURNA...	MATTER NO	MATTER DESCRIP...	DETAILS	CREATED DATE	CREATED BY
★		4455	F00004	Fox	1	Purchase of Flat...	AP1 - Application to Change the Register	01/04/2019 12:52:14	Steve
★		4428	F00004	Fox	1	Purchase of Flat...	Land Reg Form	28/03/2019 11:54:59	STEVE
★		1149	F00004	Fox	1	Purchase of Flat...	Schedule.docx	29/09/2015 15:00:39	matt
★		1148	F00004	Fox	1	Purchase of Flat...	Sent e-mail (Subject: Email Regarding Case :...	29/09/2015 15:00:39	matt
★		1016	F00004	Fox	1	Purchase of Flat...	Conflict Of Interest. Search criteria Client Filte...	21/04/2015 14:27:53	USERNAME

Right-click on the form to bring up the item menu. Download it if you wish, or select 'Check Out' which will prompt you to download a local copy for editing. Select the tick box to download a local copy, then select the option to 'Check Out'.

Check Out □ ×

Download a local copy:

Comment

Please note that if you wish to check the form back in you will need to save it locally on your machine.

If any fields have been mapped in the Supervisor area, then that data will be brought through into the form. Please see our 'How to Set Up Lexis Nexis Forms' guide on how to map fields.

Provide the full name(s) of the person(s) applying to change the register. Where a conveyancer lodges the application, this must be the name(s) of the client(s), not the conveyancer.

6 The applicant:
Miss Becky Fox

Close and save the form locally and then right-click on the form in the Matter History. Select the option to 'Check In'.

Select the button to the right of the File box and select your locally saved form. Comments are required when checking in so add a comment and then select the 'Check In' button. to save the latest version of the form to your Matter History.

Using the Case Management App

Under the 'Document Production' tab, you will have an option for 'Lexis Forms'.

Select this to view your Lexis Smart Forms. You will see a list of Lexis Smart Forms relevant to the kind of work you are doing. If any forms are missing, please speak to your system supervisor who will be able to easily add them to the list.

Left click on the Lexis Smart Form to automatically save a copy to your matter history ready for printing or distributing.

The screenshot shows the Osprey software interface. On the left is a dark sidebar with navigation icons and labels: OSPREY BROWSER, OSPREY HOME, CLIENT & MATTERS, TIME RECORDING, CASE MANAGEMENT, CLIENT LEDGERS, BANKS & JOURNALS, REPORTS, and SUPERVISOR. The main area at the top shows 'Today's Units: 0', 'Today's Time: 00h:00m', and 'Today's Value: £0.00'. Below this is a 'Global search' box. A purple 'Workflow Status Bar' displays 'Document Production - D00004/3 (Doe John/CONPUR - p/o 318 Chiswick High Road, W4 5TF) FE: DAVID WT: CONPUR'. Two buttons are visible: 'Save With Time Recording' (highlighted) and 'Save Without Time Recording'. Below these are fields for 'Template' (PA1P - Probate application), 'Folder' (with 'Matter History' selected), 'Custom Type' (Please select...), 'Description' (PA1P - Probate application), and 'Retention Period' (Please select...). At the bottom, there is an 'Automatic Time Recording' toggle switch which is turned on.

You can amend the description and assign the form to a folder if you wish, as well as set a retention period if required.

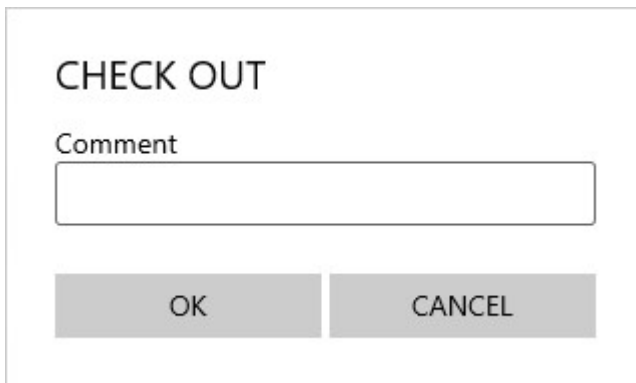
Select 'Save' to add the form to the Matter History.

You will now be shown your Matter History. The form which has just been saved will appear at the top of the list.

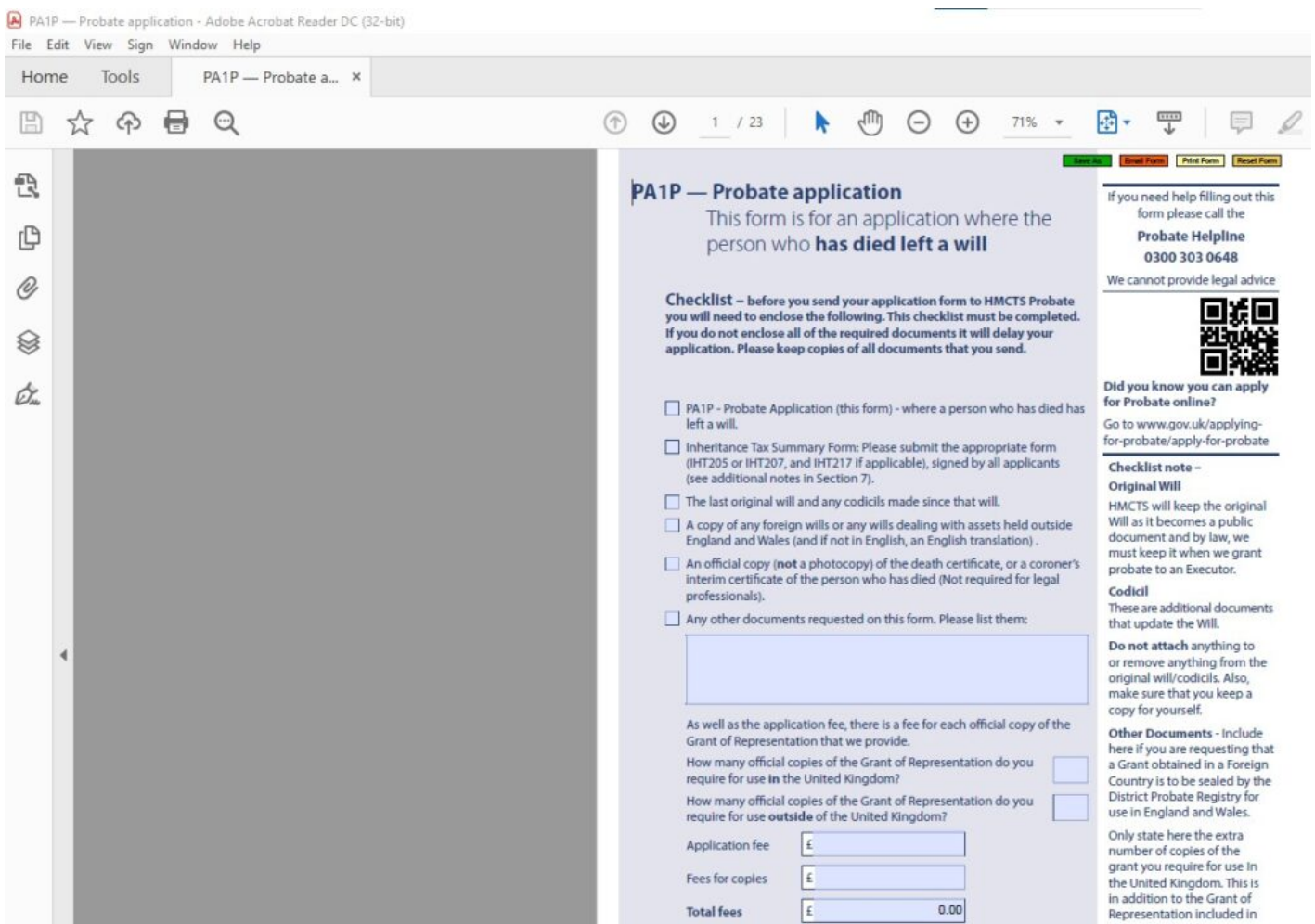
The screenshot shows the Osprey software interface with the 'Matter History' table displayed. The table has the following columns: TYPE, REF NUMBER, CLIENT NO, CLIENT SURNAME, MATTER NO, MATTER DESCRIPTION, RETENTION PERIOD, DETAILS, and CREATED DATE. The table contains seven rows of data. The top row is highlighted in light blue, indicating it is the most recent entry.

TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	MATTER DESCRIPTION	RETENTION PERIOD	DETAILS	CREATED DATE	C
	95157	D00004	Doe	3	CONPUR - p/o 318 Chiswick High Road, W4 5TF		PA1P - Probate application	15/12/2022	tr
	93307	D00004	Doe	3	CONPUR - p/o 318 Chiswick High Road, W4 5TF	2 weeks	CCL	23/05/2022	tr
	66228	D00004	Doe	3	CONPUR - p/o 318 Chiswick High Road, W4 5TF		Client D00004: Matter 3: Restored by dave.	16/03/2021	d
	66227	D00004	Doe	3	CONPUR - p/o 318 Chiswick High Road, W4 5TF		Email from system: Correspondence from Osprey Appr...	16/03/2021	d
	66226	D00004	Doe	3	CONPUR - p/o 318 Chiswick High Road, W4 5TF		_Blank Letter to Client	16/03/2021	d
	66223	D00004	Doe	3	CONPUR - p/o 318 Chiswick High Road, W4 5TF		InfoTrack - Hazard Summary Report - 1711 Leek Road	16/03/2021	d

Right-click on the form to bring up the item menu. Download it if you wish, or select 'Check Out' which will prompt you to download a local copy for editing. Select the tick box to download a local copy, then select the option to 'Check Out'.



Please note that if you wish to check the form back in you will need to save it locally on your machine.



If any fields have been mapped in the Supervisor area, then that data will be brought through into the form. Please see our 'How to Set Up Lexis Nexis Forms' guide on how to map fields.

Close and save the form locally and then right-click on the form in the Matter History. Select the option to 'Check In'.

CHECK IN

Comment

OK

CANCEL

Enter a comment here and click OK - it will then open the windows file explorer where you can locate where you saved the document and click OK. This has now uploaded the newest version to Osprey.