



Osprey Approach: Setting up Lexis Smart Forms

This help guide was last updated on
May 24th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=628>

[Click here for a printer-friendly version](#)

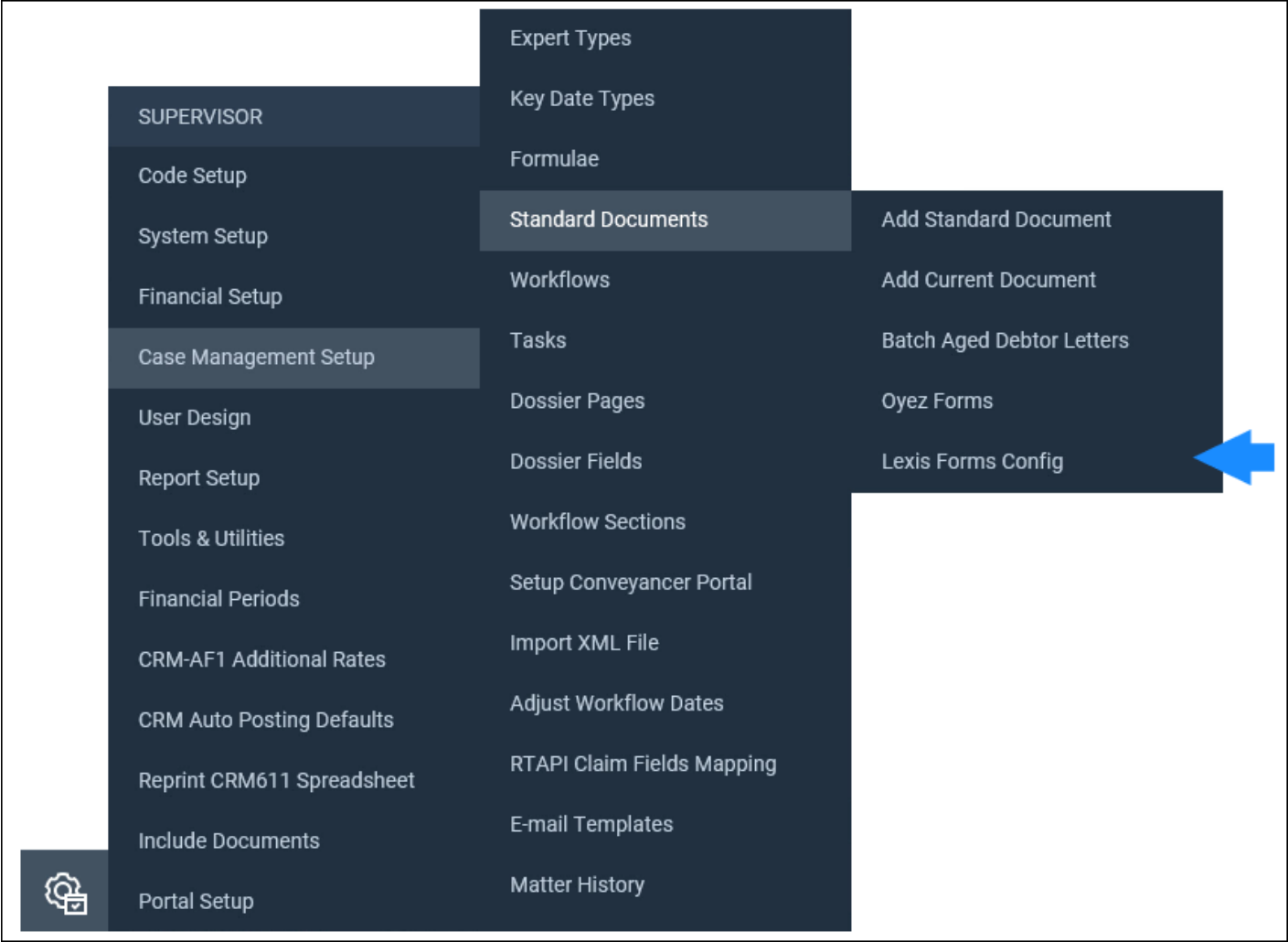


To use Lexis Smart Forms, a Supervisor level user will need to add the relevant forms into Osprey. This guide will take you through this

Osprey Approach offers integration with Lexis Nexis, 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.

Supervisor level users will be able to add new Lexis Nexis forms to the Osprey Approach database. Select the 'Supervisor' tab. Then select 'Case Management Setup' followed by 'Standard Documents' and click 'Lexis Forms Config' as shown below.



If you have added any forms previously, they will be listed here. You can filter by work type or export the list as a CSV file if required.

Add

Filter by Work Type: All

Export

Search...

WORK ID	FORM NAME	DESCRIPTION	RATE	EDIT	FIELDS	DELETE
TK_PI	lcex160.pdf	EX 160	£			
TK_RCP	lrtr1.pdf	TR1	£			

Select 'Add' to open the Add Form screen.

Save
 Cancel

Work Type: -- Select One --

Lexis Categories: All

Lexis Forms: ac001_birmingham.pdf

Description:

First, select a relevant Osprey work type to link the form to. You can leave 'Lexis Categories' as 'All'. Now select the relevant Lexis Nexis form from the available list. Please note that these forms are populated from the Lexis Nexis forms library.

When you have selected a form, give it a relevant description.

Save
 Cancel










Work Type: Residential Conveyancing Purchase

Lexis Categories: All

Lexis Forms: lrp1.pdf

Description: AP1 - Application to Change the Register

Now click 'Save' to be returned to the forms list with your new form displayed.

WORK ID	FORM NAME	DESCRIPTION	RATE	EDIT	FIELDS	DELETE	
TK_PI	lcex160.pdf	EX 160	£				
TK_RCP	ltr1.pdf	TR1	£				
RCP	lrp1.pdf	AP1 - Application to Change the Register	£				



If you wish to set a rate on the form, select this button. You will then be able to assign a rate in the same way as you would with Standard Documents.



You can amend the form description if you wish by selecting 'Edit' and then amending the existing one.





To delete the form, click the 'Delete' icon. The form will then be removed from your list and will need to be re-added if necessary.



Selecting the 'Fields' icon will allow you to link any of your Osprey fields to the form. When the form is then run through Case Management, your Osprey data will pull through.

After selecting the 'Fields' icon, the below screen will appear.


 Save
  Cancel

Work Type: Residential Conveyancing Purchase


Category: ALL


Lexis form: lrp1.pdf

Description: AP1 - Application to Change the Register

Lexis Form Fields: txt_footer 

☒ Client
 ☐ Dossier
 ☐ Client Dossier
 ☐ CDS
 ☐ Formula

Available Tables: ACCUSER 

Available Fields: EMAIL_ADDRESS 


The 'Form Fields' drop-down list will display all available fields in the form. Please note that this is populated by data from Lexis Nexis, rather than Osprey.


Select a field from the available list that you would like to map Osprey data to.

Now select an area of Osprey from which to retrieve the information. You can map from the client and dossier areas, as well as any formulas.

Now select the field in Osprey and click the 'Save' button to map the field. You can link as many fields as you need.

In the following example, we have mapped the client's full name, including the title, forename and surname.

 Save

 Cancel

Work Type: Residential Conveyancing Purchase

Category: ALL

Lexis form: lrap1.pdf

Description: AP1 - Application to Change the Register

Lexis Form Fields:

txt_int_client_surname

☒ Client ☐ Dossier ☐ Client Dossier ☐ CDS ☐ Formula




Available Tables:

LINKNAME

Available Fields:

SURNAME_1

MANAGE FIELDS

TABLENAME	FIELDID	FORMULAID	LEXIS FORM FIELD	DELETE
LINKNAME	TITLE_1		txt_int_client_title	
LINKNAME	FORENAME_1		txt_int_client_forename	
LINKNAME	SURNAME_1		txt_int_client_surname	

When you have finished mapping fields, select 'Cancel' to return to your list of forms. Please note that this will **not** undo any of the mapping.

Now, when the form is run through the Case Management area, the client's name will be pulled through using data from Osprey.