Osprey Approach: Setting up Lexis Smart Forms

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

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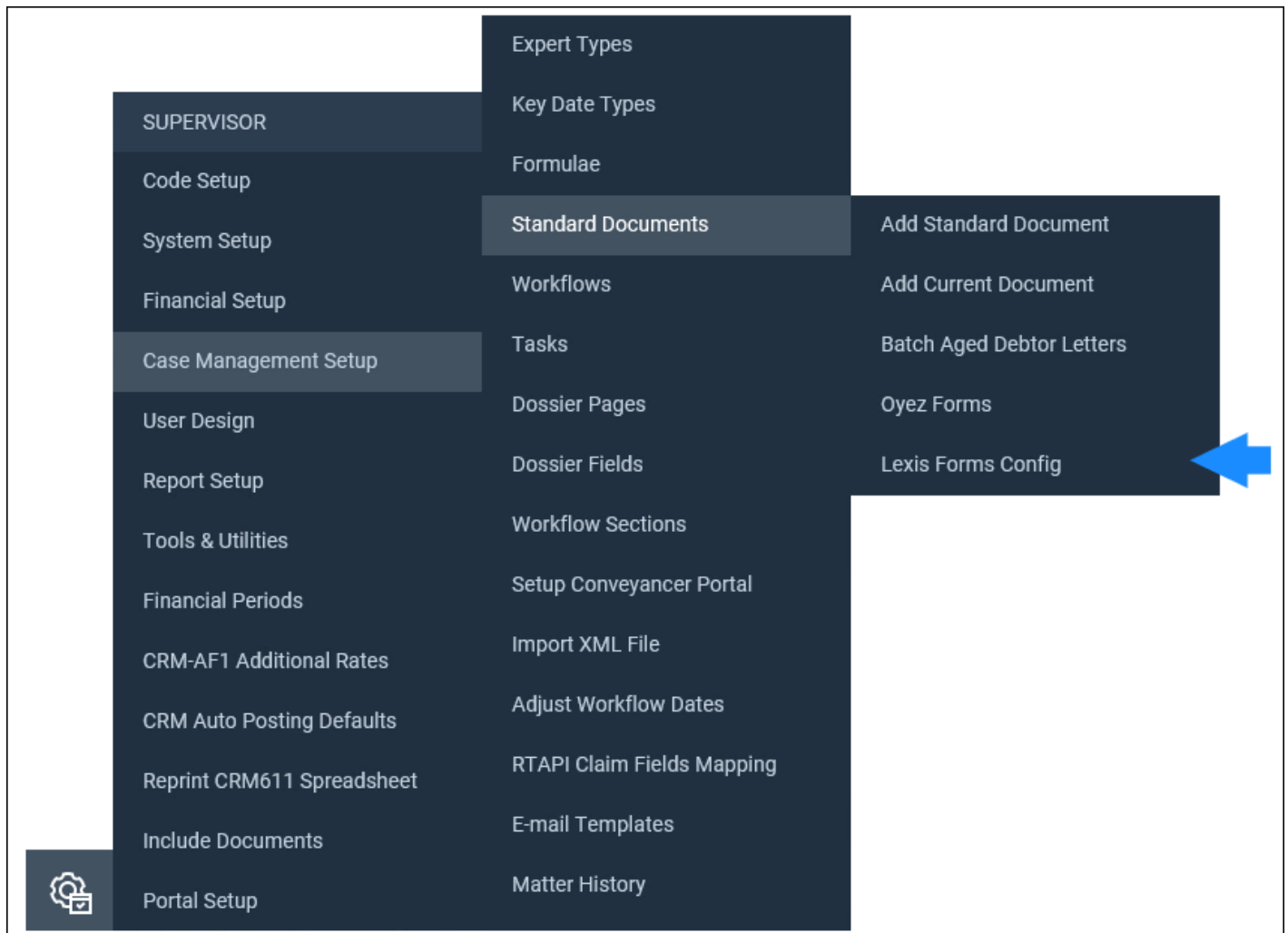
If you have added any forms previously, they will be listed here. You can filter by work type or export the list as a CSV file if required.

Select 'Add' to open the Add Form screen.

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.

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	lrtr1.pdf	TR1	£	🗎	🔗	🗑	
RCP	lrap1.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: lrap1.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.

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.