

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.

		Expert Types	
	SUPERVISOR	Key Date Types	
	Code Setup	Formulae	
	System Setup	Standard Documents	Add Standard Document
	Financial Setup	Workflows	Add Current Document
	Case Management Setup	Tasks	Batch Aged Debtor Letters
	User Design	Dossier Pages	Oyez Forms
	Report Setup	Dossier Fields	Lexis Forms Config
	Tools & Utilities	Workflow Sections	
	Financial Periods	Setup Conveyancer Portal	
	CRM-AF1 Additional Rates	Import XML File	
	CRM Auto Posting Defaults	Adjust Workflow Dates	
	Reprint CRM611 Spreadsheet	RTAPI Claim Fields Mapping	
	Include Documents	E-mail Templates	
¢.	Portal Setup	Matter History	

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.

	~					
			Search		Q	
FORM NAME	DESCRIPTION	RATE	EDIT	FIELDS	DELETE	
lcex160.pdf	EX 160	2	₽	P	Ō	^
lrtr1.pdf	TR1	2	₽	P	Ō	
	lcex160.pdf	FORM NAME DESCRIPTION lcex160.pdf EX 160	FORM NAME DESCRIPTION RATE lcex160.pdf EX 160 £	FORM NAME DESCRIPTION RATE EDIT Icex160.pdf EX 160 £ 〕	Search FORM NAME DESCRIPTION RATE EDIT FIELDS lcex160.pdf EX 160 £ 2 2	Search< Q FORM NAME DESCRIPTION RATE EDIT FIELDS DELETE lcex160.pdf EX 160 £ 2 2 1

Select 'Add' to open the Add Form screen.

🖹 Save	← Cancel	
Work Type:	- Select One	
Lexis Categories:	All	~
Lexis Forms:	ac001_birmingham.pdf	\checkmark
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:	lrap1.pdf	~
Description:	AP1 - Application to Change the Register	

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

NORK ID	FORM N	ME DESCRIPTIO	DN	RATE	EDIT	FIELDS	DELETE	
rk_pi	lcex160.	ff EX 160		3	D	P	Ō	
K_RCP	Irtr1.pdf	TR1		3	D	P	Ō	
CP	Irap1.pdf	AP1 - Applica	ation to Change the Register	3	D	P	Ō	
	3	If you wish to set a rate on the rate in the same way as you w			able to ass	ign a		
	3	rate in the same way as you w	ould with Standard Document	ts.		-		
	2 [2	rate in the same way as you w You can amend the form desc existing one.	rould with Standard Document	ts. g 'Edit' and th	en amend	ing the		
	2 \[] []	rate in the same way as you w You can amend the form desci	rould with Standard Document ription if you wish by selecting Delete' icon. The form will the	ts. g 'Edit' and th	en amend	ing the		

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

🖹 Save	Cancel
Work Type: Category: Lexis form: Description: Lexis Form Fields:	Residential Conveyancing Purchase ALL Irap1.pdf AP1 - Application to Change the Register txt_footer
	Client DossierOCDSOFormula
Available Tables Available Fields	ACCUSER

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: Category: Lexis form: Description: Lexis Form Fields:	Residential Conveyancing Purchase ALL Irap1.pdf AP1 - Application to Change the Register txt_int_client_surname	Y					
ClientOpossierO	Client DossierOCDSOFormula						
Available Tables Available Fields	LINKNAME						
MANAGE FIELDS							
TABLENAME		FIELDID	FORMULAID	LEXIS FORM FIELD	DELETE		
LINKNAME		TITLE_1		txt_int_client_title	۲		
LINKNAME		FORENAME_1		txt_int_client_forename	۲		
LINKNAME		SURNAME_1		txt_int_client_surname	۲		

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.