

Osprey Approach: Setting up Lexis Smart Forms

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

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Osprey Approach offers integration with Lexis Nexis, allowing you to run their library of legal forms through Osprey. To use these, a Supervisor level user will need to add the relevant forms into 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.

œ,

Add									
Filter by Work Type: All									
Export Search						Q			
WORK ID	FORM NAME	DESCRIPTION	RATE	EDIT	FIELDS	DELETE			
тк_рі	lcex160.pdf	EX 160	3	₿	P	Ō	^		
TK_RCP	lrtr1.pdf	TR1	3	D	P	Ō			

Select 'Add' to open the Add Form screen.

Save .	C ancel	
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:	lrap1.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	3	ß	P	Ō	^
TK_RCP	lrtr1.pdf	TR1	3	ß	P	Ō	
RCP	lrap1.pdf	AP1 - Application to Change the Register	3	D	P	Ō	

- 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: Category: Lexis form: Description:	Residential Conveyancing Purchase ALL Irap1.pdf AP1 - Application to Change the Register
Lexis Form Fields:	txt_footer

●ClientODossierOClient DossierOCDSOFormula

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: Category: Lexis form: Description:	Residential Conveyancing Purchase ALL Irap1.pdf AP1 - Application to Change the Register				
Lexis Form Fields: txt_int_client_sumame					
●Client○Dossier○	Client DossierOCDSOFormula				
Available Tables Available Fields	LINKNAME V SURNAME_1				
MANAGE FIELDS					
TABLENAME		FIELDID	FORMULAID	LEXIS FORM FIELD	DELETE
LINKNAME		TITLE_1		txt_int_client_title	\otimes
LINKNAME		FORENAME_1		txt_int_client_forename	\otimes

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.

SURNAME_1

LINKNAME

 \otimes

txt_int_client_surname

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