

Osprey Approach: Customise Matter History Columns (App)

This help guide was last updated on
Dec 28th, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=23845>



The Documents section in Osprey is customisable and will allow you to rearrange.

Add and Remove Columns

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS

TIME RECORDING

CASE MANAGEMENT

CLIENT LEDGERS

BANKS & JOURNALS

REPORTS

SUPERVISOR

Today's Time: 01h30m
Today's Value: £300.00

Global search

00:00:00 / 0

Initial Letters Sent - Awaiting Return of Docs

Home - D00058/2 (Drummond Samuel/Purchase of 14 Powdermill Lane, TW11 8PN) FE: DD WT: FW_RCP

MATTERS FOR REVIEW

CLIENT	MATTER	CLIENT NAME	MATTER DESCRIPTION	F/E	REVIEW DATE	TYPE	PERIOD	TIME LMD	LMD	SUP F/E
D00058	11	Drummond Samuel	Cont Dispute	SM	14/08/2020		0		17/03/2020	
L00004	1	Lewis Martin M	Purchase of 123 New Road, Worcester	SM	31/08/2020		0		19/08/2020	

You can tap any column heading to sort Documents either ascending or descending.



DETAILS	CREATED D
New Deal Room Document	23/09/20
Cheque Requisition Slip - Fee Earner Bill	17/09/20
Bill 2 for Aging	16/09/20
Bill for Aging 1	16/09/20
WIP Limit Test 365 Add-in	02/09/20
Outlook imported e-mail	02/09/20
Client B00002 data csv	01/09/20
New Document	13/08/20

It is also possible to drag the columns around if you wish to reorder them. Simply hold down the left mouse button while hovering over a column heading and drag and drop the column to where you would like it to appear.

The following table shows all the columns available

Favorite
Type
Ref Number
Client No
Client Surname
Matter No
Matter Description
Retention Period
Details
Created Date
Processed Date
Created By
Custom Type
Last Modified Date
Last Modified By
Size
Web Enabled
Checked Out Date
Checked Out By
Checked Out Comment
Is Checked Out
External Checked Out Date
External Checked Out By
External Checked Out Comment
Is External Checked Out
Email From
Email To
Email Cc
Email Bcc
Email Subject
Email Body
Email Date
Is Email Attachment
Journal Subject
Journal Body
Journal Entry Type
Journal Company
Journal Duration
Is Journal Attachment

Rearranging the Column Order

TYPE	REF NUMBER	CLIENT NO	CLIENT SI
	71269	B00002	Braithwa
	70964	B00002	Braithwa

Click the Column Heading and slide it to the desired position

Resizing The Columns


To resize the Columns use the horizontal arrows to adjust them to the size that you Require. These settings will then save for when you next log into the app.

 Request Signature (DocuSign) ☐ Global



Search...



TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	DETAILS	CREATED DATE
	27052	000052	Practice	1	Blank Doc 2	21/12/2022