



Osprey Approach: GDPR: Performing Data Erasure

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The latest version is always online at
<https://support.pracctice.com/?p=906>

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Who is this guide for?

Case Management Supervisors and System Supervisors

We have also produced a short video if you prefer to watch these steps.

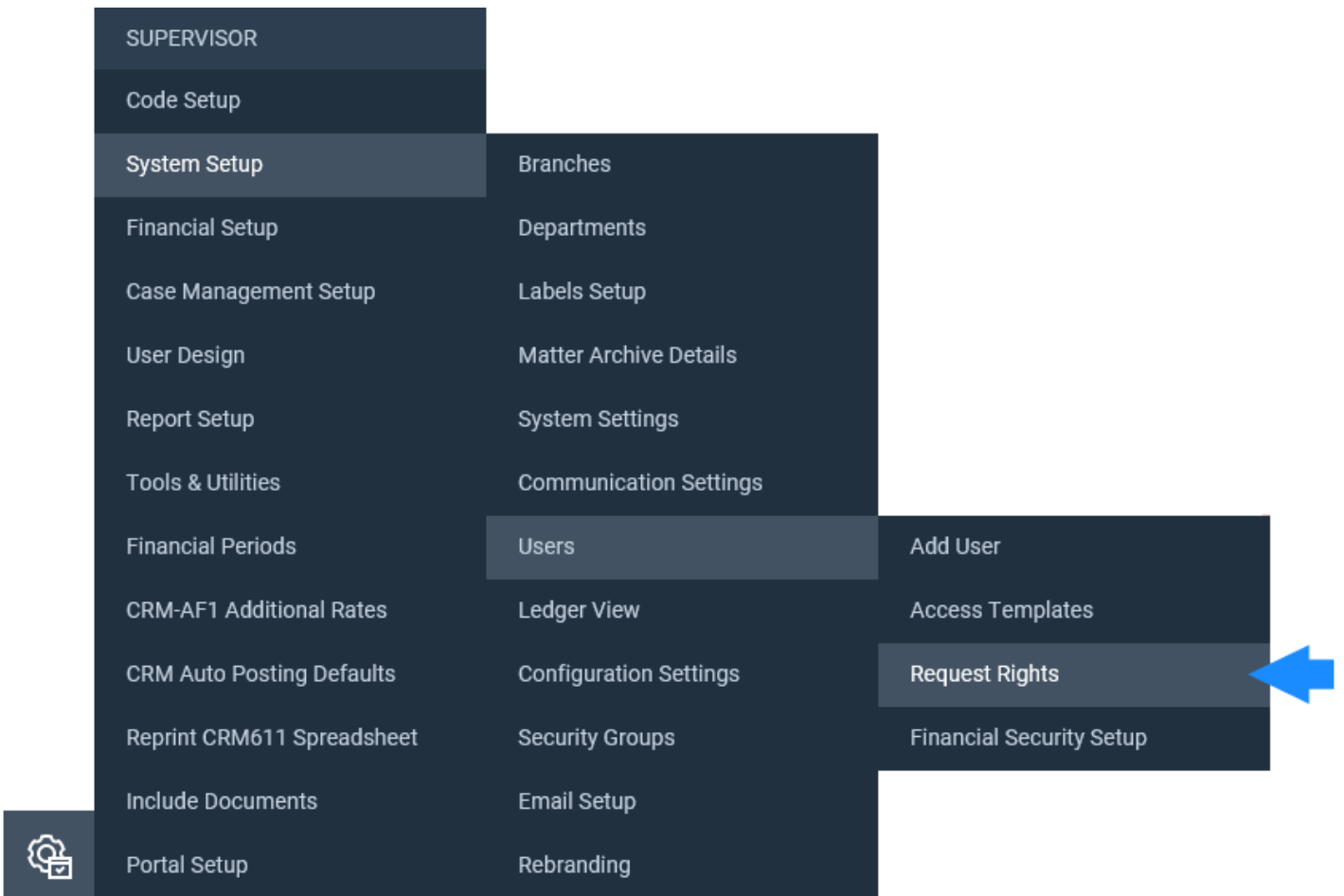
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Step 1

To utilise this functionality, relevant access must be granted to suitable personnel. There will be a two-step level of authorisation required, therefore, you will need to nominate users whom are requesters and users whom will authorise the requests. Authorisation is set up within the supervisor menu as shown below.

Please note that a user cannot be both an authoriser and a requester!

Authorisation is set up within the supervisor menu as shown below.



If any users have been assigned rights, they will appear in the list.

REQUEST RIGHTS ▾

+ Add
📄 Export
🔄
☰

USER	↑	ERASURE	DATA	EDIT	DELETE
BECKY		Approval	Approval		
CRISTINA		Request	Request		
MARCEL		Request	Request		
RICHARD		Request	Request		
USER		Approval	Approval		

Page 1 of 1 (5 items)
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Page size: 10

Step 2

Select the 'Add' button. The screen below will appear and will allow you to select a user from the drop-down list, then allocate Erasure or Data Request permissions to them.

Save Cancel

User: Select

Erasure: None

Data: None

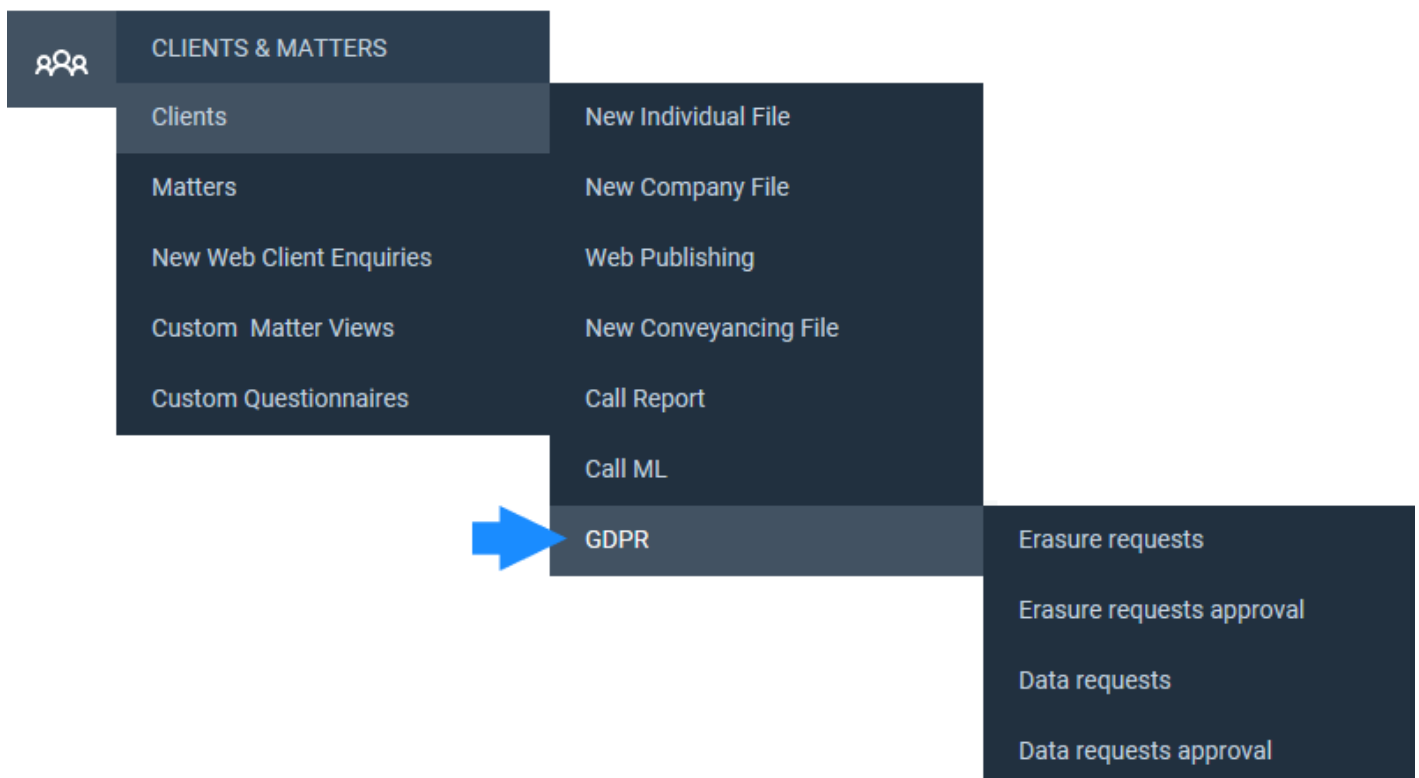
Click 'Save' and the user will be added to the list.

Step 3

You may amend a user's rights by selecting the 'Edit' icon or delete the user from the list of Request Rights by selecting the 'Delete' icon.

To access the GDPR options to request either a file deletion or a data request, navigate to the 'Clients & Matters' area, then select 'Clients'.

You will now see an option for GDPR as shown here. Select this to bring up the options available to you.



Step 4

First, we have logged in as a **requester**.

We will look at 'Erasure Requests'. After selecting the option, any existing removal requests will be displayed, as below.

ERASURE REQUESTS ▼

+ New request Export Refresh

CLIENT NO	MATTER NO	SURNAME	MATTER DESCRIPTION	DATE ARCHIVED	ERASURE REQUESTED BY	NOTES	REQUESTED DATE ↓	SELECT
BARNES0001	1	Barnes	Sale of 45 Nightingale Street, Hfd	06/02/2018	richard		06/02/2018	<input checked="" type="checkbox"/>
RICHARDS01	1	Richards	Purchase of 29 Folly Lane, Hereford	06/02/2018	richard		06/02/2018	<input checked="" type="checkbox"/>

Page 1 of 1 « < 1 > » Page size: 10 ▼

You may remove a request by clicking the 'Select' icon and then confirming the removal. To add a new erasure request, select the 'New Request' button and then select your client from the available drop-down list. Please note that you may also start typing the client number to auto-search.

Save Cancel Export Info

Client:

Notes:

Data to be erased: **1 matters**

Matter 1
Matter history entries
- Client MORTON0001: Matter 1: Archived by richard. Reference Location

Step 5

Once selected, you will be able to see how many matters will be erased.

Please note that you can only request erasure from clients whose matters are **all archived**.

+ New request Export Refresh

CLIENT NO	MATTER NO	SURNAME	MATTER DESCRIPTION	DATE ARCHIVED	ERASURE REQUESTED BY	NOTES	REQUESTED DATE ↓	SELECT
MORTON0001	1	Morton	Sale of 12 Sandy Road, Malvern	06/02/2018	richard		06/02/2018	<input checked="" type="checkbox"/>
BARNES0001	1	Barnes	Sale of 45 Nightingale Street, Hfd	06/02/2018	richard		06/02/2018	<input checked="" type="checkbox"/>
RICHARDS01	1	Richards	Purchase of 29 Folly Lane, Hereford	06/02/2018	richard		06/02/2018	<input checked="" type="checkbox"/>

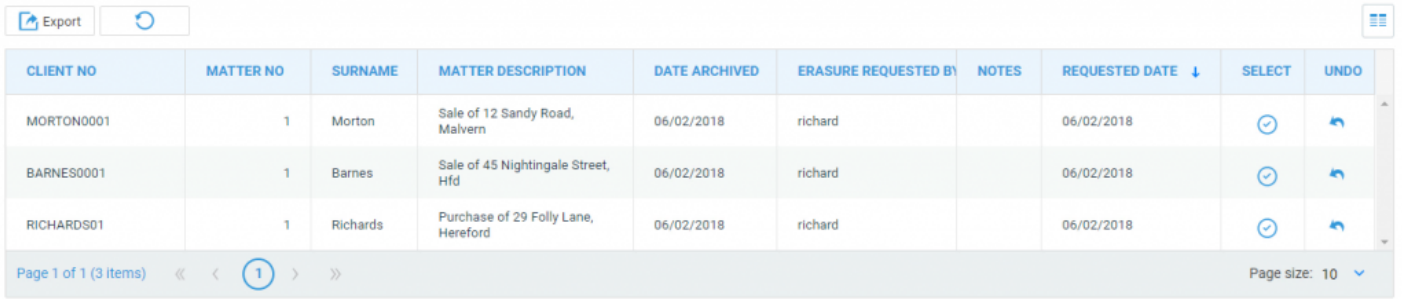
Page 1 of 1 (3 Items) « < 1 > » Page size: 10 ▼







The selected client will now be added to the list for pending data erasure. An authoriser will now be able to log into Osprey and authorise the requests.

Step 6

For the final part of this guide, we will log in as an **authoriser**.

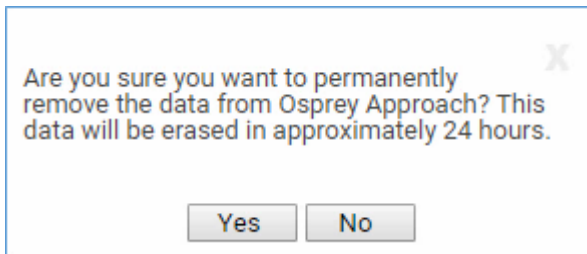
Select 'Erasure Request Approval' from the GDPR menu. You will now be able to see a list of erasure requests available for your approval. As an authoriser, you may also undo these if required.



CLIENT NO	MATTER NO	SURNAME	MATTER DESCRIPTION	DATE ARCHIVED	ERASURE REQUESTED BY	NOTES	REQUESTED DATE ↓	SELECT	UNDO
MORTON0001	1	Morton	Sale of 12 Sandy Road, Malvern	06/02/2018	richard		06/02/2018		
BARNES0001	1	Barnes	Sale of 45 Nightingale Street, Hfd	06/02/2018	richard		06/02/2018		
RICHARDS01	1	Richards	Purchase of 29 Folly Lane, Hereford	06/02/2018	richard		06/02/2018		

To approve a request, click the corresponding icon in the 'Select' column.

The message shown here will appear to advise you that the selected client and matter information will be permanently removed from Osprey Approach in 24 hours, leaving only the client & matter number available.



Click 'Yes' to confirm approval or click 'No' to return to the list of requests. After the 24 hour period has elapsed, the client data will no longer appear in Osprey.