



Osprey Approach: The Matter History Audit

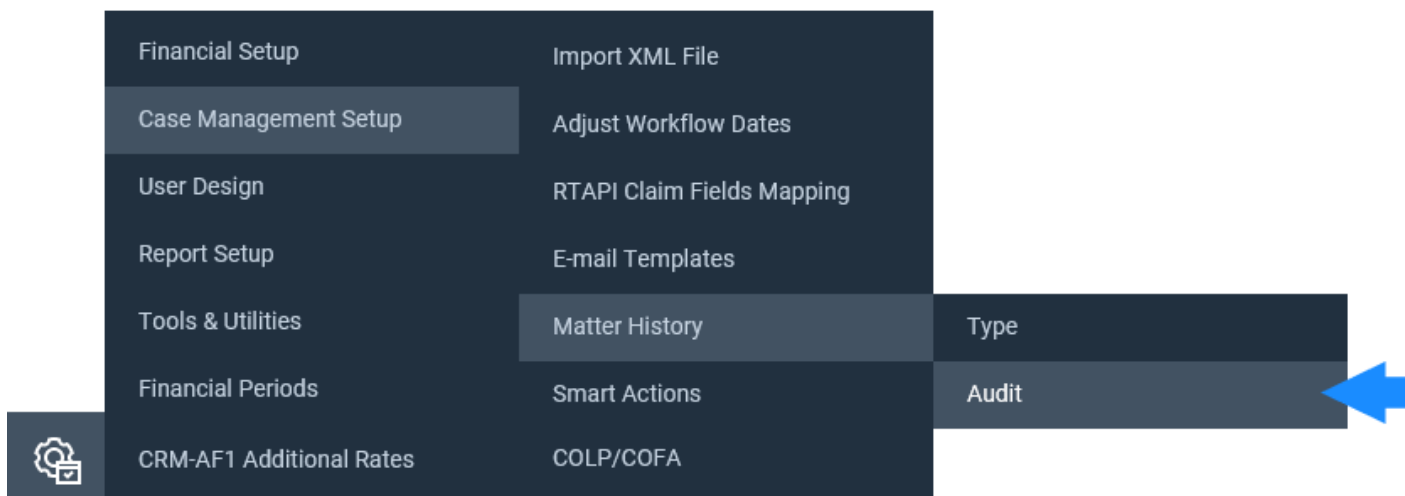
This help guide was last updated on
Dec 21st, 2022

The latest version is always online at
<https://support.ospreyapproach.com/?p=808>



Osprey Approach allows you to view a full audit trail for your Matter History. This way you will be able to see which of your users has checked out or deleted a document, as well as any other actions which may have been performed.

Navigate to the Supervisor area, select Case Management Setup and then click on Matter History. You should now have the option to click on Audit.



The audit will now appear, displaying all actions taken when using the Matter History. The main actions include deleting, checking in, checking out and adding a new document, however other actions are also recorded.

Export

Search... 



TYPE	REF NUMBER	ACTION	DATE	USER	CLIENT NO	MATTER NO
	4550	Delete	17/07/2019 11:55:05	steve	C00023	1
	4548	New	17/07/2019 11:51:15	steve	C00023	1
	4538	CheckIn	26/06/2019 10:29:50	dave	D00023	3
	4538	CheckOut	26/06/2019 10:28:09	dave	D00023	3
	4538	New	26/06/2019 10:27:47	dave	D00023	3

You are also able to select the Configure Grid icon at the top right of the audit table to add column headings which can be used to filter the results even further, for example if you wanted to find if a particular user had deleted a document on a particular file.

You have the option to export the results into a spreadsheet. Simply click on Export and then choose either XLSX or CSV.

