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

Click here for a printer-friendly version

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

Add and Remove Columns

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

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 S[
	71269	B00002	Braithw:
	70964	B00002	Braithw:

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.

TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	DETAILS	CREATED DATE
	27052	P00052	Praactice	1	Blank Doc 2	21/12/2022

Request Signature (DocuSign) ☐ Global