Osprey Approach: Customise Matter History Columns (Browser)

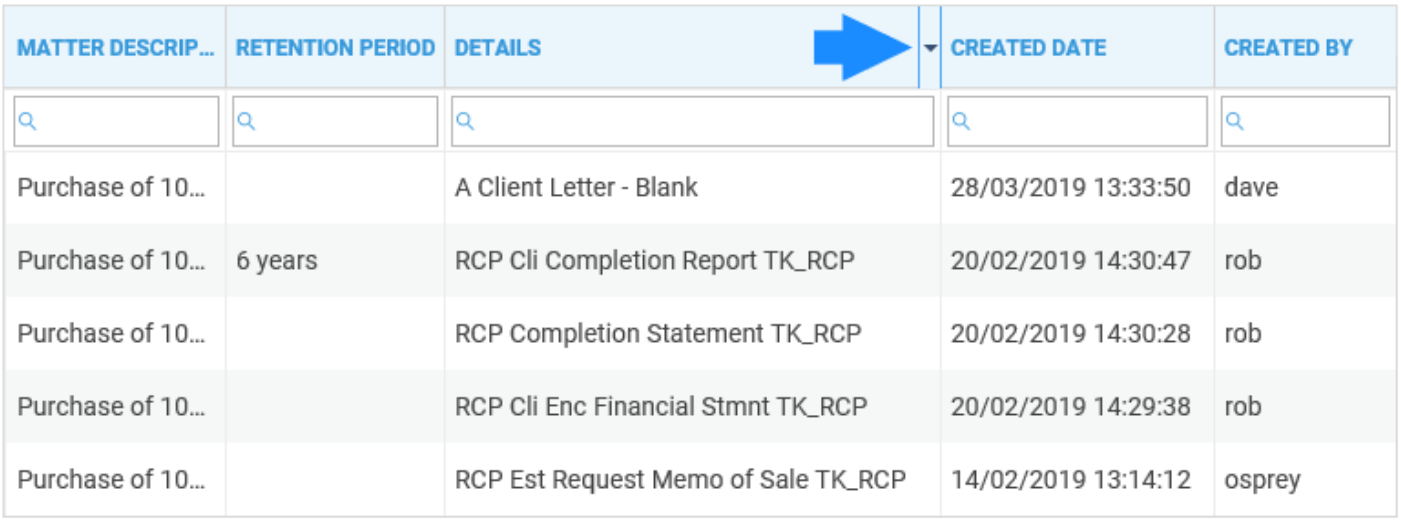
This help guide was last updated on
Dec 27th, 2023

The latest version is always online at
https://support.ospreyapproach.com/?p=293

The Osprey Approach Matter History is entirely customisable and will allow you to rearrange, add and remove any columns.

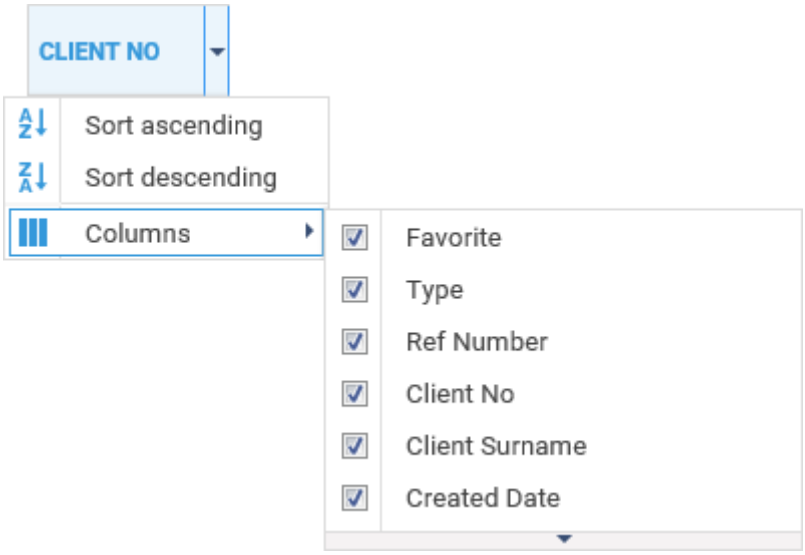
Navigate to your Case Management tab to bring up the Matter History.

Hover over a column heading and a small [icon down] icon will appear on the right hand side, as highlighted below. Select this icon to open further column options.



MATTER DESCRIP...	RETENTION PERIOD	DETAILS	CREATED DATE	CREATED BY
Purchase of 10...		A Client Letter - Blank	28/03/2019 13:33:50	dave
Purchase of 10...	6 years	RCP Cli Completion Report TK_RCP	20/02/2019 14:30:47	rob
Purchase of 10...		RCP Completion Statement TK_RCP	20/02/2019 14:30:28	rob
Purchase of 10...		RCP Cli Enc Financial Stmnt TK_RCP	20/02/2019 14:29:38	rob
Purchase of 10...		RCP Est Request Memo of Sale TK_RCP	14/02/2019 13:14:12	osprey

You can sort the selected column in ascending or descending order if you wish. Click the Columns option to open up a list of available columns to insert. Hover over the small drop-down arrow at the bottom of the list to scroll down to view further available columns.



Any columns which are ticked will appear in the Matter History. Tick any other columns you wish to show or untick them to hide them.

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, if required, for your Matter History.

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