

# Osprey Approach: GDPR Configuration

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The latest version is always online at https://support.ospreyapproach.com/?p=63223



## This guide will demonstrate the options available in Osprey in terms of the GDPR functionality

Osprey offers both GDPR data requests to provide all details stored on the client's file, or GDPR erasure requests to erase their personal information.

All GDPR requests require 2 users, a Requester, and an Approver.

### Setting up authorised users

Please note: a user cannot be both an authoriser and a requester for the same type of GDPR request.

To utilise this functionality, relevant access must be granted to suitable personnel. There will be a twostep level of authorisation required.

You will need to nominate users to have access to request and users will authorise the requests. Authorisation is set up within Supervisor > System Setup > Users > Request Rights

| _ |                            |                        |                          |
|---|----------------------------|------------------------|--------------------------|
|   | SUPERVISOR                 |                        |                          |
|   | Code Setup                 |                        |                          |
|   | -<br>System Setup          | Branches               |                          |
|   | Financial Setup            | Departments            |                          |
|   | Case Management Setup      | Labels Setup           |                          |
|   | User Design                | Matter Archive Details |                          |
|   | Report Setup               | System Settings        |                          |
|   | Tools & Utilities          | Communication Settings |                          |
|   | Financial Periods          | Users                  | Add User                 |
|   | CRM-AF1 Additional Rates   | Ledger View            | Access Templates         |
|   | CRM Auto Posting Defaults  | Configuration Settings | Request Rights           |
|   | Reprint CRM611 Spreadsheet | Security Groups        | Financial Security Setup |
|   | Include Documents          | Email Setup            |                          |
| 1 | Portal Setup               | Rebranding             |                          |

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

#### REQUEST RIGHTS 🗸

Q.

| + Add Export   | Add Export |          |          |      |        |   |  |
|--|------------|----------|----------|------|--------|---|--|
| USER   | Ť          | ERASURE  | DATA     | EDIT | DELETE |   |  |
| BECKY  |            | Approval | Approval | P    |        | ^ |  |
| CRISTINA   |            | Request  | Request  | P    |        |   |  |
| MARCEL   |            | Request  | Request  | P    |        |   |  |
| RICHARD  |            | Request  | Request  | P    |        |   |  |
| USER   |            | Approval | Approval | P    | Ī      | ~ |  |
| Page 1 of 1 (5 items) $\langle \langle 1 \rangle \rangle$ Page size: 10 $\checkmark$ |            |          |          |      |        |   |  |

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

| Save 🛞 Cancel |        |          |
|---------------|--------|----------|
| User:         | Select | <b>•</b> |
| Erasure:      | None   | ~        |
| Data:         | None   | ~        |

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

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

#### **Access Template**

The access templates can be configured to only show the relevant areas depending on the users template.

| Please ensure the correct access | is granted | within th | e access | template | area to | view | this fo | acility |
|----------------------------------|------------|-----------|----------|----------|---------|------|---------|---------|
| under the Client & Matter menu.  |            |           |          |          |         |      |         |         |

Go to Supervisor > System Setup > Users > Access Templates.

Locate the relevant access template, right click select Edit.

The options to show the GDPR screens are within Client and Matter > Client > GDPR.

GDPR
 Erasure requests
 Add new erasure request
 Erasure requests approval
 Data requests
 Add new data request
 Data requests approval

As a minimum, the relevant users will need access to the following areas:

• Erasure Requesters will require Erasure Requests & Add new erasure request

- Erasure Approvers will require Erasure Requests & Erasure Requests Approval
- Data Requesters will require
  Data Requests & Add new data request
- Data Approvers will require
  Data Requests & Data Request Approval