



Osprey Approach: GDPR: Performing Data Erasure

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

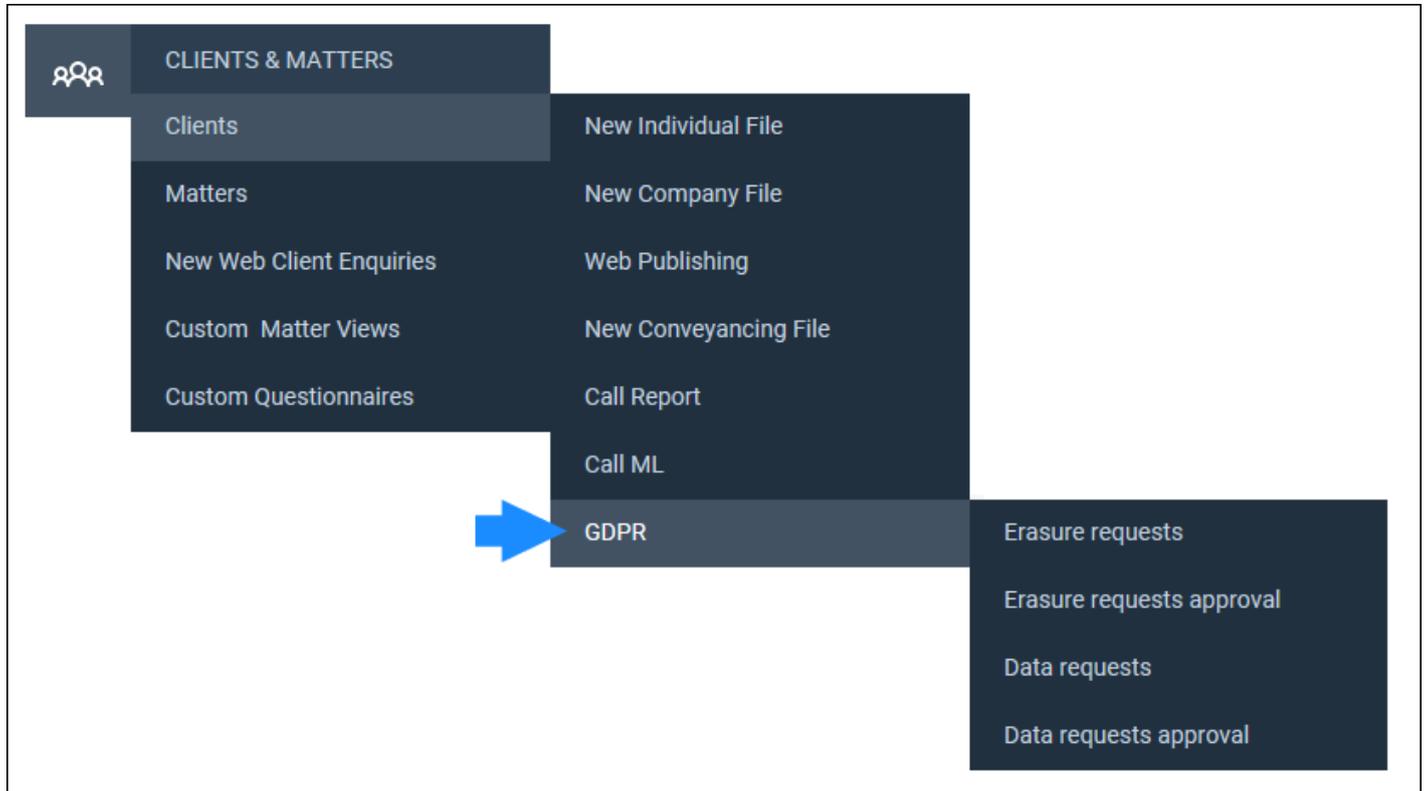


Performing a Request

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

To access the GDPR options 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.



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

The screenshot shows a table titled 'ERASURE REQUESTS'. At the top left, there are buttons for 'New request', 'Export', and a refresh icon. At the top right, there is a list view icon. The table has the following columns: CLIENT NO, MATTER NO, SURNAME, MATTER DESCRIPTION, DATE ARCHIVED, ERASURE REQUESTER, NOTES, REQUESTED DATE (with a downward arrow), and SELECT (with a circular arrow icon). There are two rows of data. The first row is for 'BARNES0001' with matter number '1', surname 'Barnes', and matter description 'Sale of 45 Nightingale Street, Hfd'. The second row is for 'RICHARDS01' with matter number '1', surname 'Richards', and matter description 'Purchase of 29 Folly Lane, Hereford'. Both rows have a date archived of '06/02/2018' and an erasure requester of 'richard'. The 'REQUESTED DATE' is also '06/02/2018'. At the bottom left, it says 'Page 1 of 1' and at the bottom right, 'Page size: 10'.

CLIENT NO	MATTER NO	SURNAME	MATTER DESCRIPTION	DATE ARCHIVED	ERASURE REQUESTER	NOTES	REQUESTED DATE ↓	SELECT
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	⌂

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.

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

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

Save
Cancel
Export Info

Client: MORTON0001 - Morton

Notes:

Data to be erased: 1 matters

Matter 1

Matter history entries

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

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.

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	✔
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	✔

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Performing an Authorisation

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.

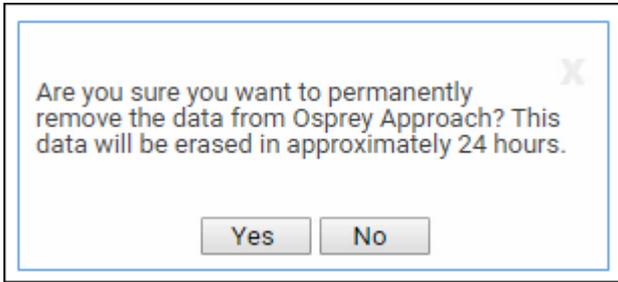
Export
Refresh

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	✔	↶

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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.