

Osprey Approach: GDPR: Performing Data Requests

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The latest version is always online at
<https://support.ospreyapproach.com/?p=66281>

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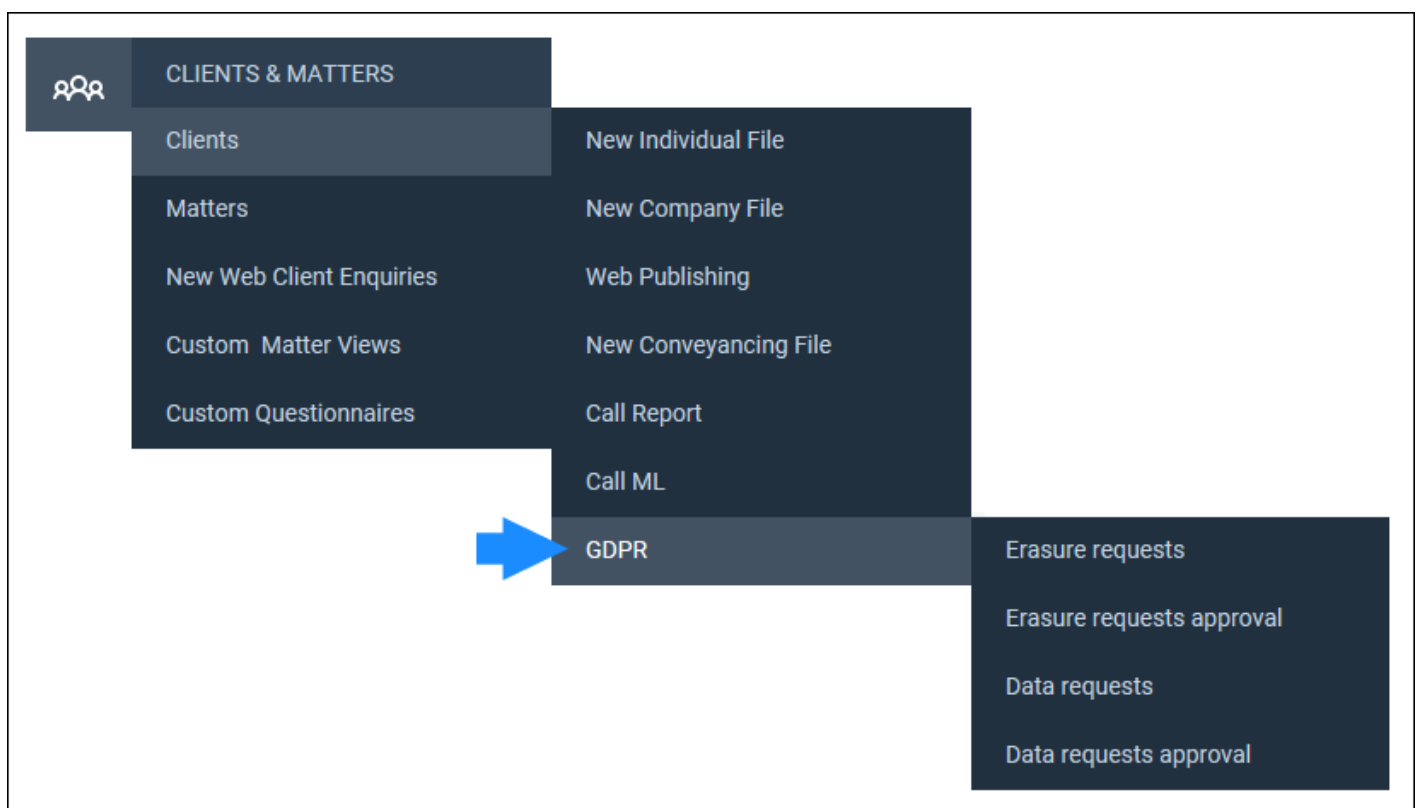
In line with GDPR regulations, Osprey Approach now offers you the ability to perform and authorise data requests. This guide will go through this process

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 'Data Requests'. After selecting the option, any existing data requests will be displayed, as below.

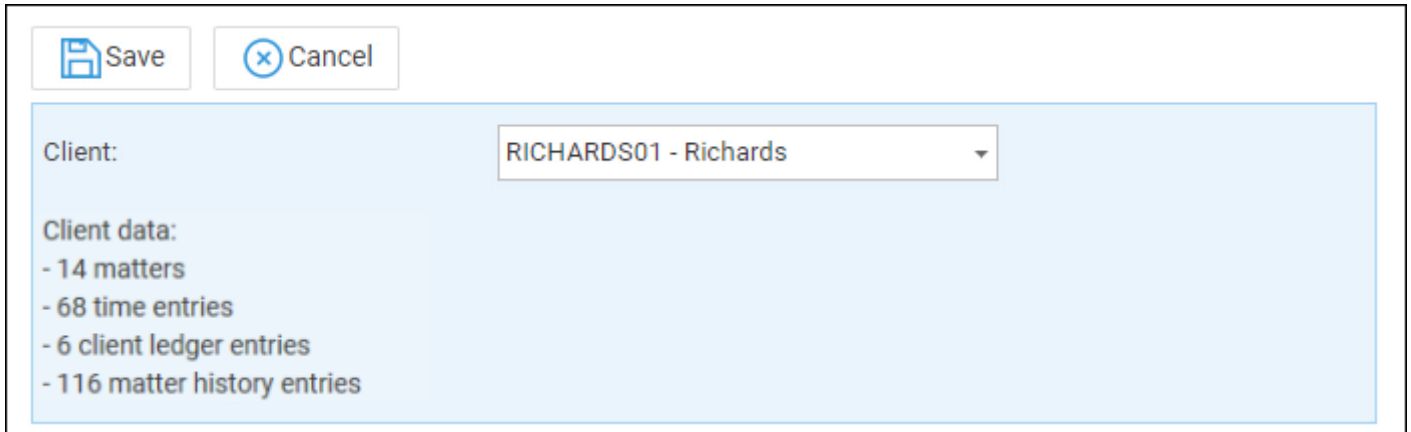
The screenshot shows a table titled 'DATA REQUESTS' with a dropdown arrow. Above the table are buttons for 'New request', 'Export', and a refresh icon. The table has columns for 'CLIENT NO', 'MATTER NO', 'SURNAME', 'MATTER DESCRIPTION', 'DATA REQUESTED BY', 'REQUESTED DATE', and 'SELECT'. Two rows of data are visible. The first row has CLIENT NO 800002, MATTER NO ALL, SURNAME Braithwaite, DATA REQUESTED BY tom, and REQUESTED DATE 23/01/2020. The second row has CLIENT NO 800096, MATTER NO ALL, SURNAME Taniaa, DATA REQUESTED BY user5, and REQUESTED DATE 22/11/2019. Both rows have a circular 'SELECT' icon in the final column. Below the table is a pagination bar showing 'Page 1 of 1 (2 items)' and navigation arrows.

CLIENT NO	MATTER NO	SURNAME	MATTER DESCRIPTION	DATA REQUESTED BY	REQUESTED DATE	SELECT
800002	ALL	Braithwaite		tom	23/01/2020	⊘
800096	ALL	Taniaa		user5	22/11/2019	⊘

You may remove a request by clicking the 'Select' icon and then confirming the removal.

To add a new data 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.

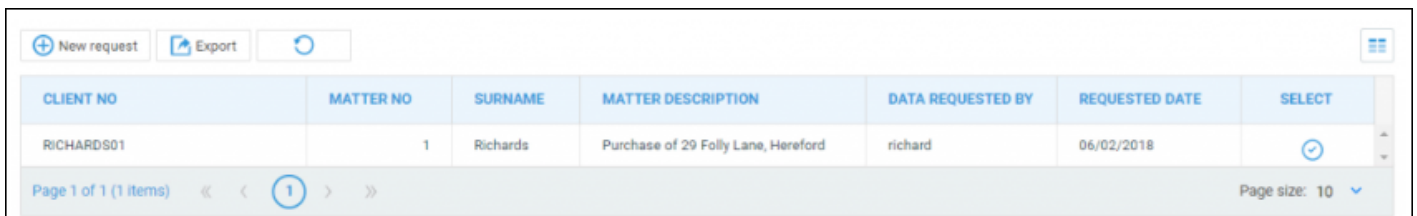
Once selected, the amount of matters, time ledger entries, client ledger entries and matter history entries will be displayed.



The screenshot shows a form with two buttons at the top: 'Save' (with a floppy disk icon) and 'Cancel' (with a red 'X' icon). Below the buttons is a 'Client:' label followed by a dropdown menu showing 'RICHARDS01 - Richards'. Underneath, the 'Client data:' section lists the following statistics:

- 14 matters
- 68 time entries
- 6 client ledger entries
- 116 matter history entries

Select 'Save' to confirm the request, as seen below.



The screenshot shows a table with the following columns: CLIENT NO, MATTER NO, SURNAME, MATTER DESCRIPTION, DATA REQUESTED BY, REQUESTED DATE, and SELECT. The table contains one row of data:

CLIENT NO	MATTER NO	SURNAME	MATTER DESCRIPTION	DATA REQUESTED BY	REQUESTED DATE	SELECT
RICHARDS01	1	Richards	Purchase of 29 Folly Lane, Hereford	richard	06/02/2018	

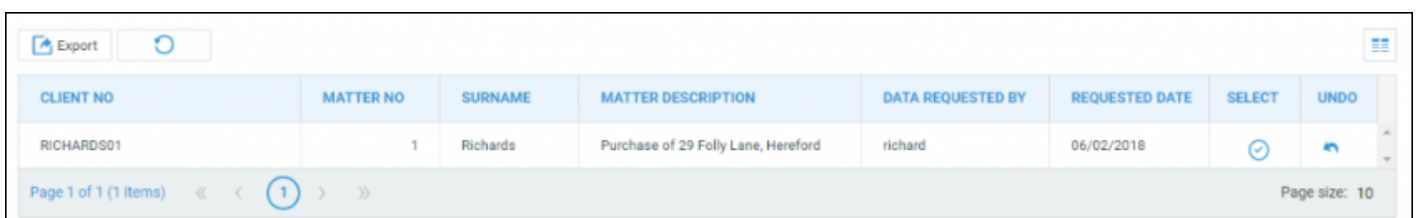
Below the table, there is a pagination bar showing 'Page 1 of 1 (1 items)' and a 'Page size: 10' dropdown.

The following message will be received by email. " Your data request has been approved. We'll notify you as soon as the data is available in your matter history."

Performing an Authorisation

For the final part of this guide, we will log in as an **authoriser**.

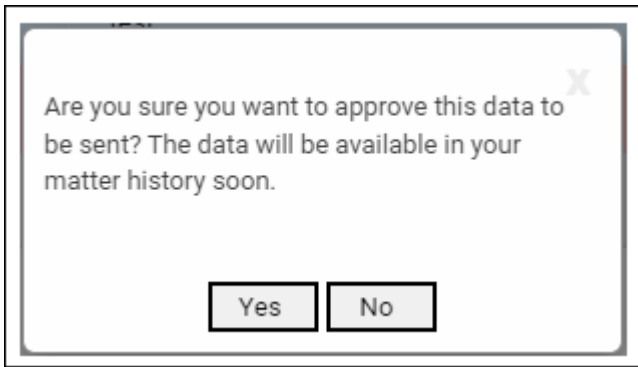
To approve a data request, Select 'Data Request Approval' from the GDPR menu. The list of requests will appear. As with data erasure, you will be able to undo a request should you wish. Click the 'Select' icon to approve.



The screenshot shows the same table as above, but with an additional 'UNDO' column. The 'SELECT' column now contains a blue checkmark icon, and the 'UNDO' column contains a blue undo icon.

CLIENT NO	MATTER NO	SURNAME	MATTER DESCRIPTION	DATA REQUESTED BY	REQUESTED DATE	SELECT	UNDO
RICHARDS01	1	Richards	Purchase of 29 Folly Lane, Hereford	richard	06/02/2018		

Below the table, there is a pagination bar showing 'Page 1 of 1 (1 items)' and a 'Page size: 10' dropdown.



Select the 'Yes' button to confirm approval or click 'No' to return to the list of requests.

As soon as possible the data will be available as a zip file from the chosen client's Matter History and can then be emailed or downloaded as required.

Please note: Emails exported using the Office 365 Outlook Add-in will be shown in a file named emails.pdf within the zip file.

The following message will be received by email "Your data request is ready for download. Please check your matter history."