

Osprey Approach: The Matter History Audit

This help guide was last updated on
May 10th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=808>

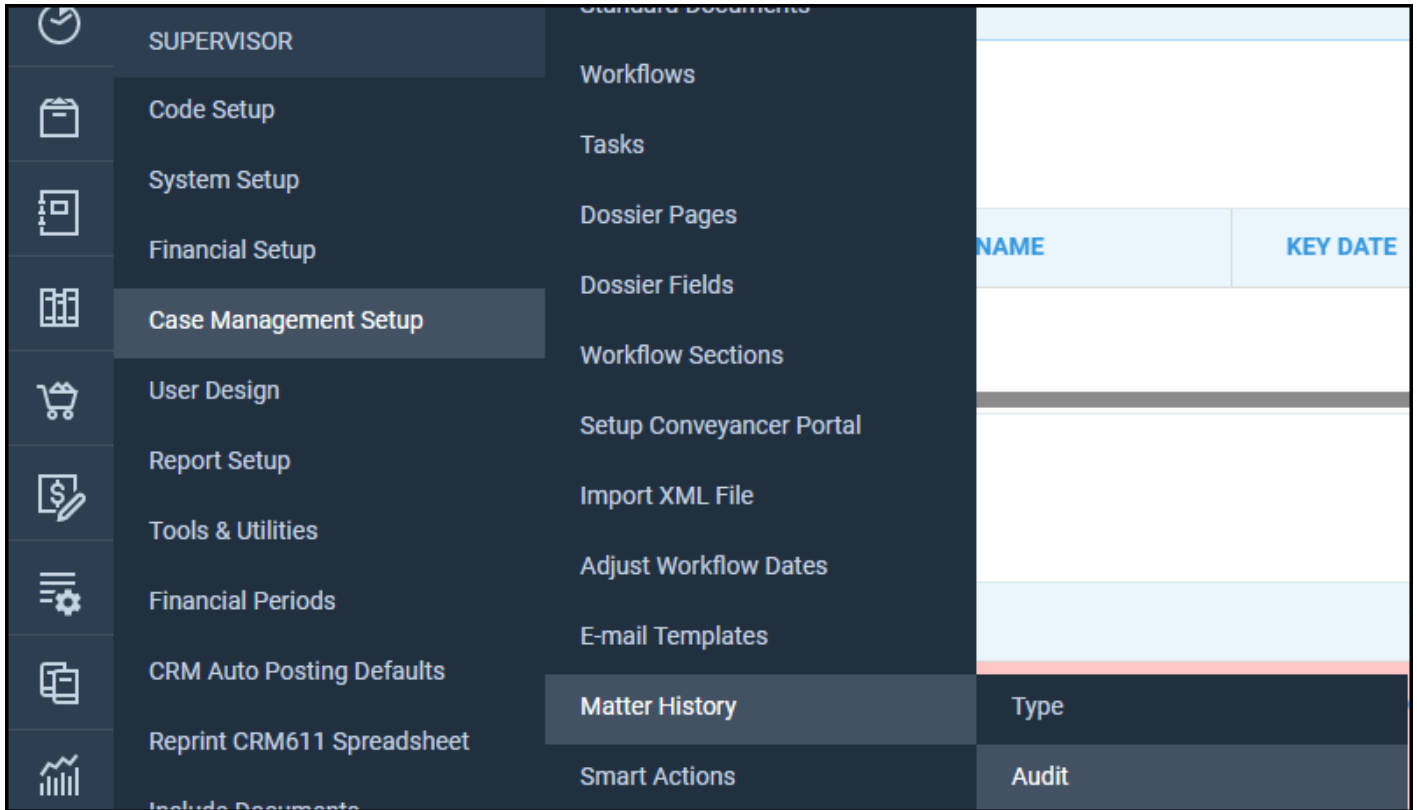
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Osprey Approach allows you to view a full audit trail for your Matter History. This way you will be able to see which of your users has checked out or deleted a document, as well as any other actions which may have been performed.

Accessing the Matter History Audit

Navigate to Supervisor > Case Management Setup > Matter History > Audit.



The audit will now appear, displaying all actions taken when using the Matter History.

Viewing the Matter History Audit

The main actions include deleting, checking in, checking out and adding a new document, however other actions are also recorded.

Supervisor > Case Management Setup > Matter History > Audit

Export [Refresh] Search... [Search] [Menu]

TYPE	REF NUMBER	ACTION	DATE	USER	CLIENT NO	MATTER NO
	123418	New	10/05/2024 08:46:33	user9	GE000001	22
	123417	New	10/05/2024 07:49:56	user9	GE000001	22
	123416	New	10/05/2024 07:35:28	user9	GE000001	22
	123415	New	10/05/2024 07:30:34	user9	GE000001	22
	123414	New	09/05/2024 16:41:56	Ellie	00339	1
	123413	New	09/05/2024 16:38:48	Ellie	00339	1
	123408	New	09/05/2024 16:03:45	Ellie	00348	1
	123407	New	09/05/2024 16:03:44	Ellie	00348	1
	123406	New	09/05/2024 16:03:43	Ellie	00348	1
	123405	New	09/05/2024 16:03:43	Ellie	00348	1

You are also able to select the Configure Grid icon at the top right of the audit table to add a filter row.

Search... [Search] [Menu]

- SHOW FILTER ROW
- SHOW/HIDE COLUMNS
- TYPE
- REF NUMBER
- ACTION
- USER
- CLIENT NO
- MATTER NO

Exporting the Matter History Audit

You can export the results into a spreadsheet if you wish. Simply click on Export and then choose either XLSX or CSV.

