



Osprey Approach: Managing user Access Templates

This help guide was last updated on
Dec 21st, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=612>



In Osprey it is possible to set different levels of access for users. These are known as access templates and will be linked to one or a number of users in the Osprey system. In this guide, we will look at setting these templates up.

By default, you will have the following templates:

- **Supervisor**
- **Case Worker**
- **Accounts**
- **Guest**










These can be amended or copied to a new template.

To see a full list of all the access options available click [here](#).

Add a new Access Template

If you have an access template which covers most of the actions you'd like your staff member to be able to complete, but you wish to give them slightly more access than other users, you can copy and amend an existing template. Similarly, you can copy an access template, but remove certain access rights for another user.

Firstly, check the access templates you have in use currently. This can be done from Supervisor > System Setup > Users > Access Templates.

Supervisor > System Setup > Users > Access Templates				
<div><div> New</div><div> Export</div><div></div></div>				
TEMPLATE ID	TEMPLATE NAME	DELETE	EDIT	
1	Supervisor			
2	Guest			
5	Case Worker			
6	Accounts			

To add a new template, click the New button. Enter a name for the template which describes the type of access it is for, and if you wish to copy an existing template to make amendments to, tick the Copy Template box and select the template you wish to copy from the drop down list:



Save



Cancel



Delete

Template Name:

Accounts Plus Case Management Setup

Copy Template?:



Template:

Accounts



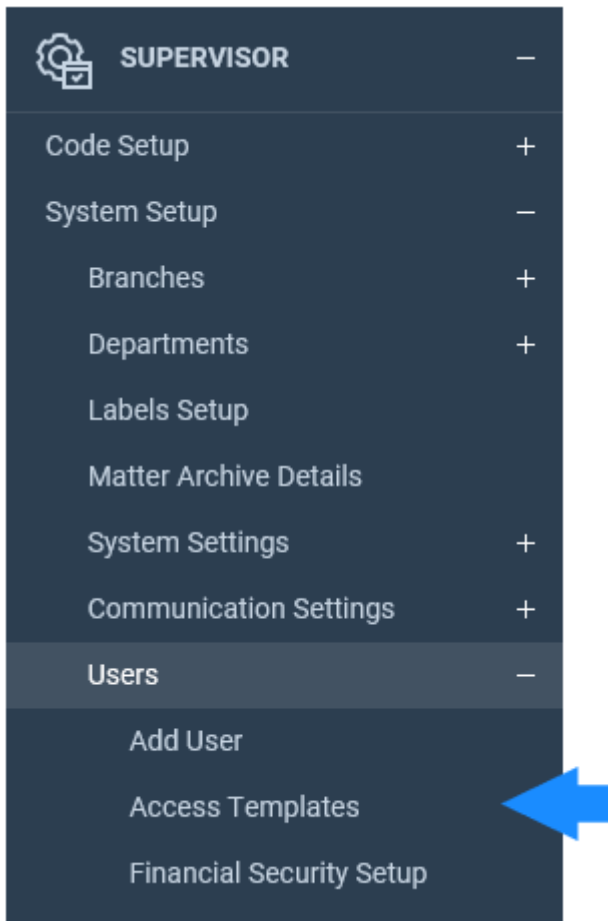
Click Save, and a copy of the selected template will be made.

Please note - if you choose NOT to copy an existing template, the new template will be given NO access rights at all, and you will need to select each area within Osprey that you wish to grant access to, along with every action available.

Now, follow the instructions below.

Edit an Access Template

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



You will see a full list of your access templates available on the system.

Click the Edit button alongside the template you wish to amend.

Supervisor > System Setup > Users				
<div><div>New</div><div>Export</div><div></div></div>				
TEMPLATE ID	TEMPLATE NAME	DELETE	EDIT	
1	Supervisor			
2	Guest			
5	Case Worker			
6	Accounts			
7	Accounts Plus Case Management Setup			

The next screen will display a list of the areas of Osprey on one side and a series of check boxes on the other.













If there is no check box alongside the area, as highlighted below, this means that the template does not have any access into that area at all (so any user linked to this template will not see the menu when they log in).



Save

- > ☒ **OSPREY HOME**
- > ☒ **CLIENTS & MATTERS**
- > ☒ **TIME RECORDING**
- > ☒ **CASE MANAGEMENT**
- > ☒ **CLIENT LEDGERS**
- > ☒ **NOMINAL LEDGERS**
- > ☒ **PURCHASE LEDGERS**
- > ☒ **BANKS & JOURNALS**
- > **SMART ACTIONS**
- > **COLP/COFA**
- > ☒ **REPORTS**
- > **SUPERVISOR**

To grant access to an area, select the area and click the Allow Area Access button:

- > ☒  **OSPREY HOME**
- > ☒  **CLIENTS & MATTERS**
- > ☒  **TIME RECORDING**
- > ☒  **CASE MANAGEMENT**
- > ☒  **CLIENT LEDGERS**
- > ☒  **NOMINAL LEDGERS**
- > ☒  **PURCHASE LEDGERS**
- > ☒  **BANKS & JOURNALS**
- >  **SMART ACTIONS**
- >  **COLP/COFA**
- > ☒  **REPORTS**
- >  **SUPERVISOR**

You can then expand the areas you wish to give access to, and tick all that apply.

To expand the list, select the chevron to the far left of the relevant area. This will now show other areas within that heading which can be ticked or unticked as necessary.

Select each of the areas in turn to choose which actions the users linked to this template will be permitted to perform.

Once finished, ensure that you click 'Save'.

Change the access rights for an existing user

You can change the access template for any of your users as follows.

Navigate to Supervisor > System Setup > Users. Right click the user you wish to amend the access for, and select Edit.

Osprey Broom & Broom Ltd. Today's Units: 0 Today's Time: 00:00:00 Today's Value: £0.00 Global search

Supervisor System Setup Users

Export Clear UI state Search...

USER ID	TEMPLATE NAME	EMAIL ADDRESS	FEE EARNER	LOCKED	PASSWORD EXPIRE DATE	IN USE
ALINA	Supervisor	alina@norsoft.ro			02/11/2021	●
GOOGLE	Supervisor	mitzi@practice.net	TP		22/01/2022	●
MITZI	Case Worker	mitzi@practice.net	MAB		04/05/2022	●
Supervisor		mitzi@practice.net	MAB		28/05/2022	●
TESTTIMEOUT	Supervisor	mitzi@practice.net			15/02/2022	●

Page 1 of 1 (5 items) Page size: 10

Select the access template you wish to assign to the user, then click Save.

Supervisor System Setup Users

Save Cancel Archive

User Id: MITZI

Template: Case Worker

Email:

Fee Earner: Case Worker

Redirect Keydates: Accounts Accounts Plus Case Management Setup

StylePath: Default

Preferred Ledged View: Default View