



Osprey Approach: Report Writer – Set Permissions on Your Custom Reports

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Oct 13th, 2021

The latest version is always online at
<https://support.pracctice.com/?p=36070>

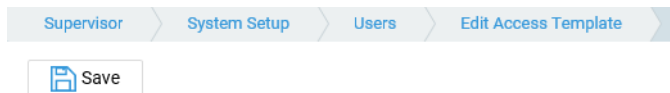
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Who is this guide for?

Case Management Supervisors and System Supervisors

If you have written your own reports which contain sensitive information, you may want to ensure that only certain users have access to them. This guide will show you how. By default, any user access template which has access into the area highlighted below will be able to see all reports within the Reports (New) section. Supervisor users will also be able to see all reports in Reports (New).



- >  **CASE MANAGEMENT**
- >  **CLIENT LEDGERS**
- >  **NOMINAL LEDGERS**
- >  **PURCHASE LEDGERS**
- >  **BANKS & JOURNALS**
- >  **SMART ACTIONS**
- >  **COLP/COFA**
- ∨  **REPORTS**
 - > Financial Management
 - Financial Management 2
 - > Client Financial
 - Client Financial 2
 - > Other Financial
 - > Analysis
 - > Time
 - > Miscellaneous Reports
 - ∨ **Reports (New)**
 - Report Viewer**

To modify the users who can see each report, follow the steps below.

- From within Osprey Approach, navigate to the Reports area, and then Reports (New).
- Right-click on the report you wish to restrict permissions on and select Set Permissions.

Label
Report Type: Time Reports
ProspectWIP
Time Spent With User ID
Time Ledger Running Balance
All WIP Limit Matters
J Code Time Recording
WIP Limits Including Billed Time
Legal Aid Rates
WIP By Matter Fee Earner With Billed Time
Time Rates - Private - Fee Earner Charge Rates

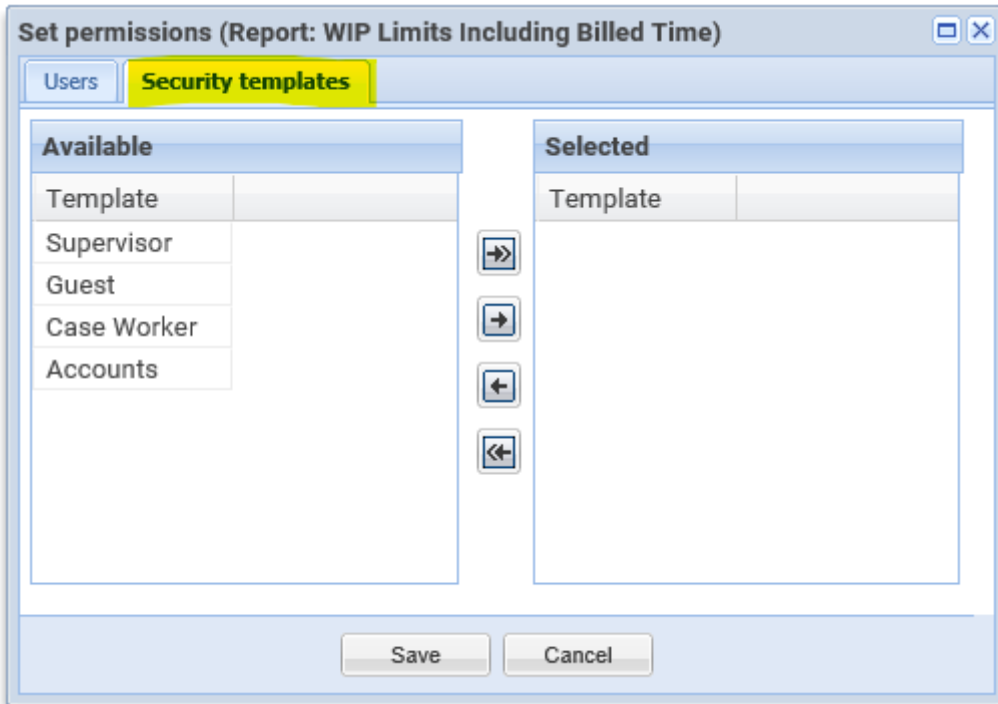
Run
Set permissions

Set permissions (Report: WIP Limits Including Billed Time) □ ×

Users | Security templates

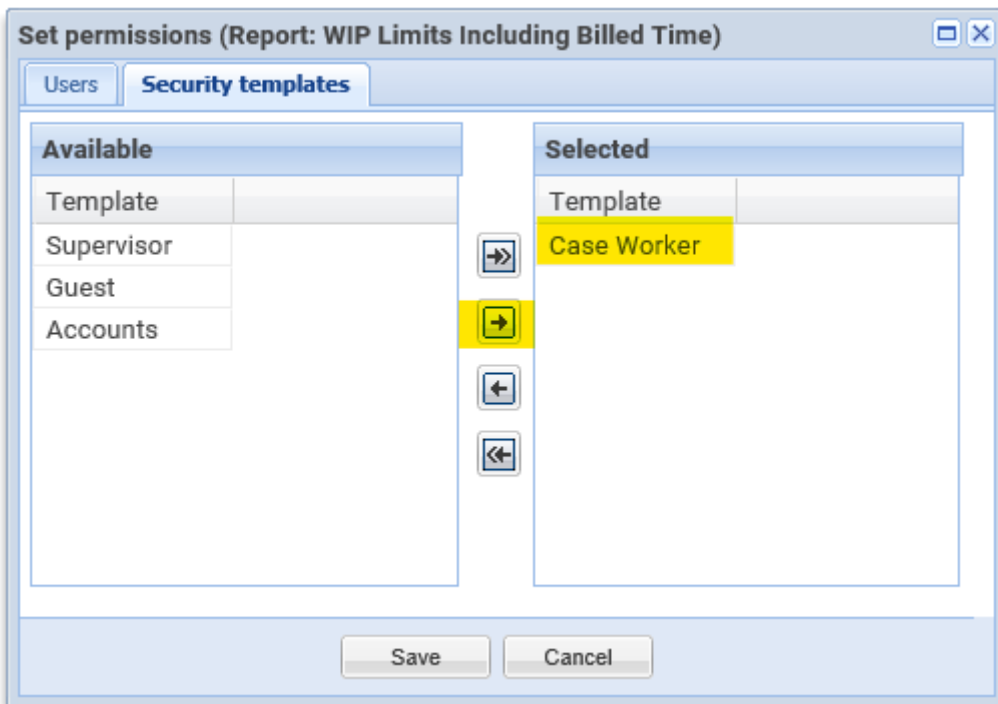
Available		Selected
User id		User id User email
ALEXH	al	
DAVE	da	
Supervisor	ch	
SUPERVISOR2	m	
SUPERVISOR3	ne	
USER	m	

You can either set permissions for individual users



or for all users linked to a particular access template

Highlight the user/access template that you want to allow permission for and select the single right arrow to move it into the Selected box.



The report will now only be visible to the Users/Security Templates that you have selected.