

Osprey Approach: Managing User Access Templates

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<https://support.ospreyapproach.com/?p=612>

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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

Add new access templates to allow users different levels of access within Osprey

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.

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:

Supervisor > System Setup > Users > ... > Add

Template Name:

Copy Template?:

Template:

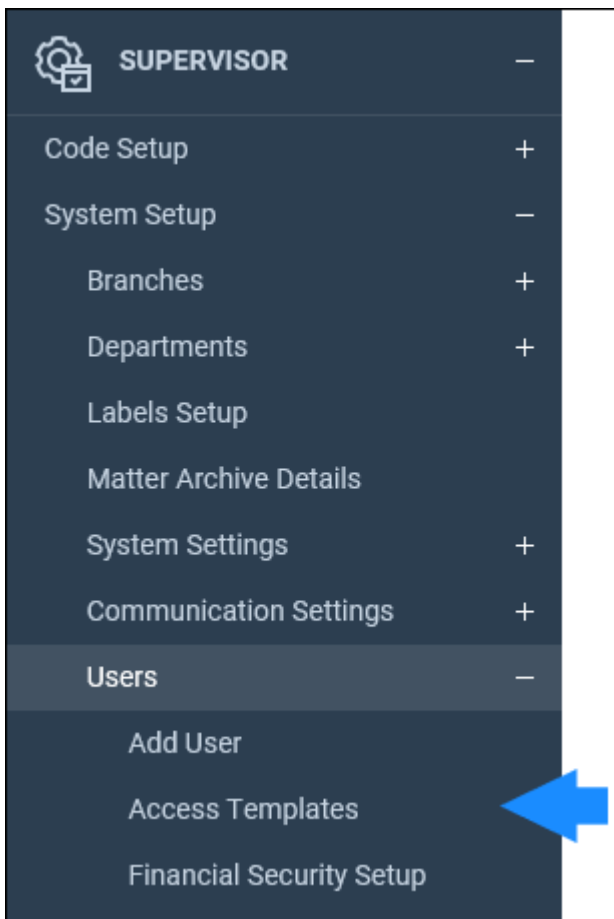
Click Save, and a copy of the selected template will be made.

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.












A screenshot of the 'Access Templates' table. The table has columns for 'TEMPLATE ID', 'TEMPLATE NAME', 'DELETE', and 'EDIT'. The 'Accounts Plus Case Management Setup' row is highlighted in yellow.

TEMPLATE ID	TEMPLATE NAME	DELETE	EDIT
1	Supervisor		
2	Guest		
5	Case Worker		
6	Accounts		
7	Accounts Plus Case Management Setup		

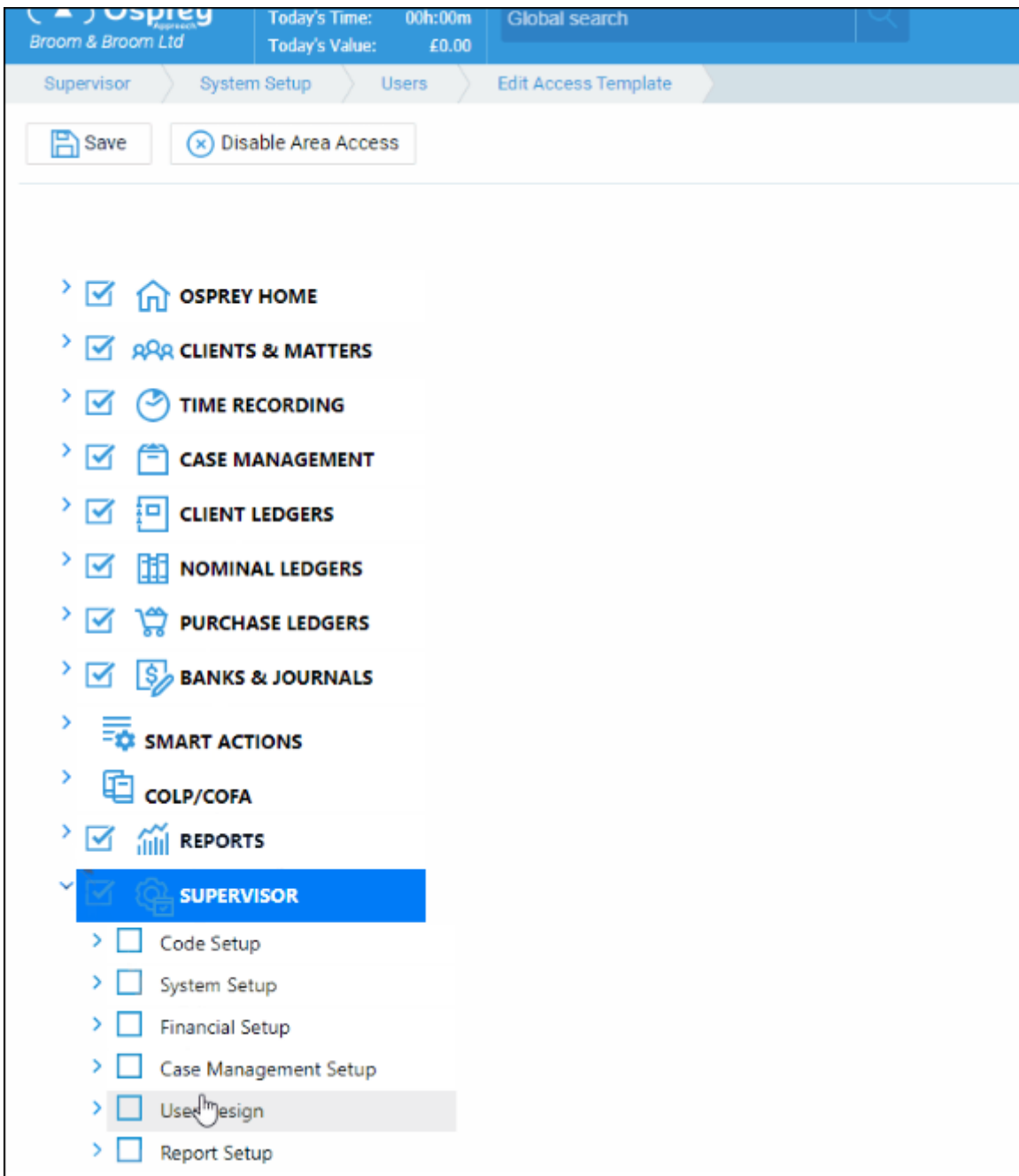
The next screen will display a list of the areas of Osprey on one side and a series of check boxes on the other.

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:



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.

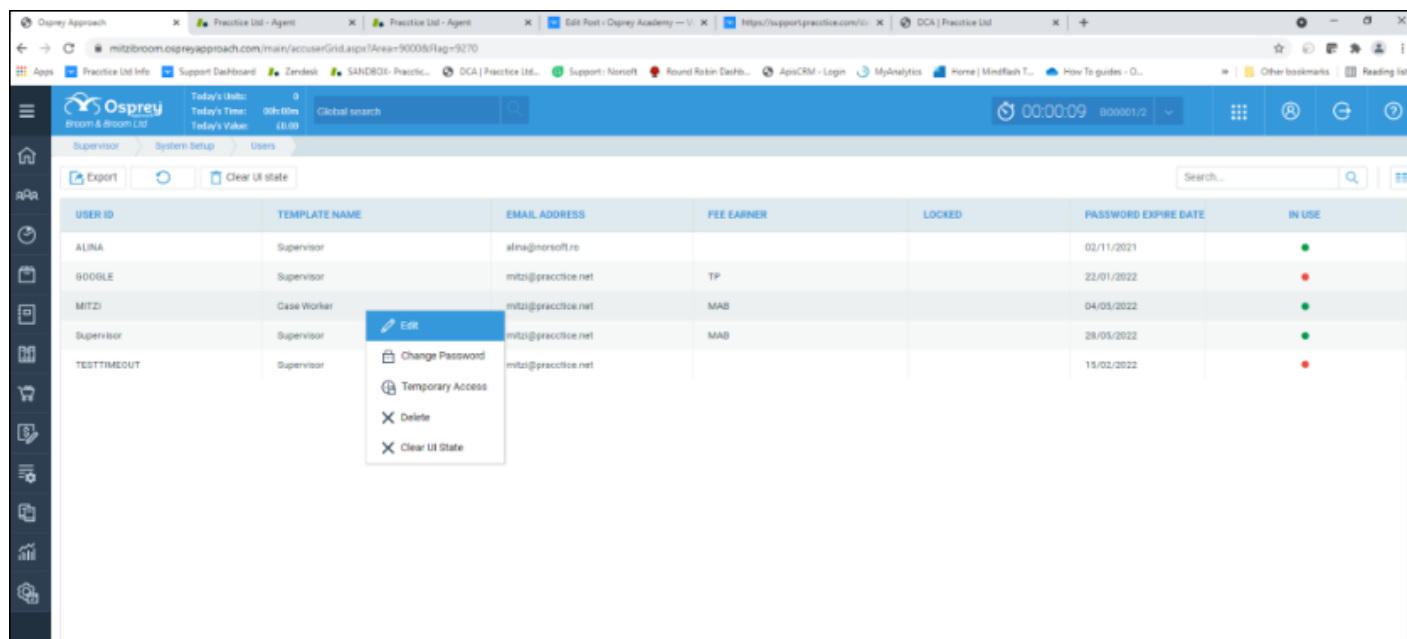
Select each of the areas in turn to choose which actions the users linked to this template will be permitted to perform.

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.



The screenshot shows the Osprey user management interface. The top navigation bar includes 'Supervisor', 'System Setup', and 'Users'. Below the navigation bar, there are buttons for 'Export' and 'Clear UI state'. A search bar is located on the right. The main content area displays a table of users with the following columns: USER ID, TEMPLATE NAME, EMAIL ADDRESS, FEE EARNER, LOCKED, PASSWORD EXPIRE DATE, and IN USE. The table contains five rows of user data. A context menu is open over the 'MITZI' user row, showing options: 'Edit', 'Change Password', 'Temporary Access', 'Delete', and 'Clear UI State'.

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@practicoe.net	TP		22/01/2022	●
MITZI	Case Worker	mitzi@practicoe.net	MAB		04/05/2022	●
Supervisor	Supervisor	mitzi@practicoe.net	MAB		28/05/2022	●
TESTTIMEOUT	Supervisor	mitzi@practicoe.net			13/02/2022	●

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



Save



Cancel



Archive

User Id:

MITZI

Template:

Case Worker



Email:

Supervisor

Guest

Fee Earner:

Case Worker

Redirect Keydates:

Accounts

Accounts Plus Case Management Setup

StylePath:

Default



Preferred Ledged View:

Default View

