

Osprey Approach: Managing User Access Templates

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The latest version is always online at
<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.


Access templates


TEMPLATE ID	TEMPLATE NAME
1	Supervisor
2	Guest
5	Case Worker
6	Accounts
7	Cashier
8	Test template
9	Supervisor Tom
10	Farnworth Rose testing template
11	Sup test permissions

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:

Add access template

 Save

 Cancel

 Delete

Template Name:

Accounts Plus Case Management Setup

Copy Template?:



Template:

Supervisor

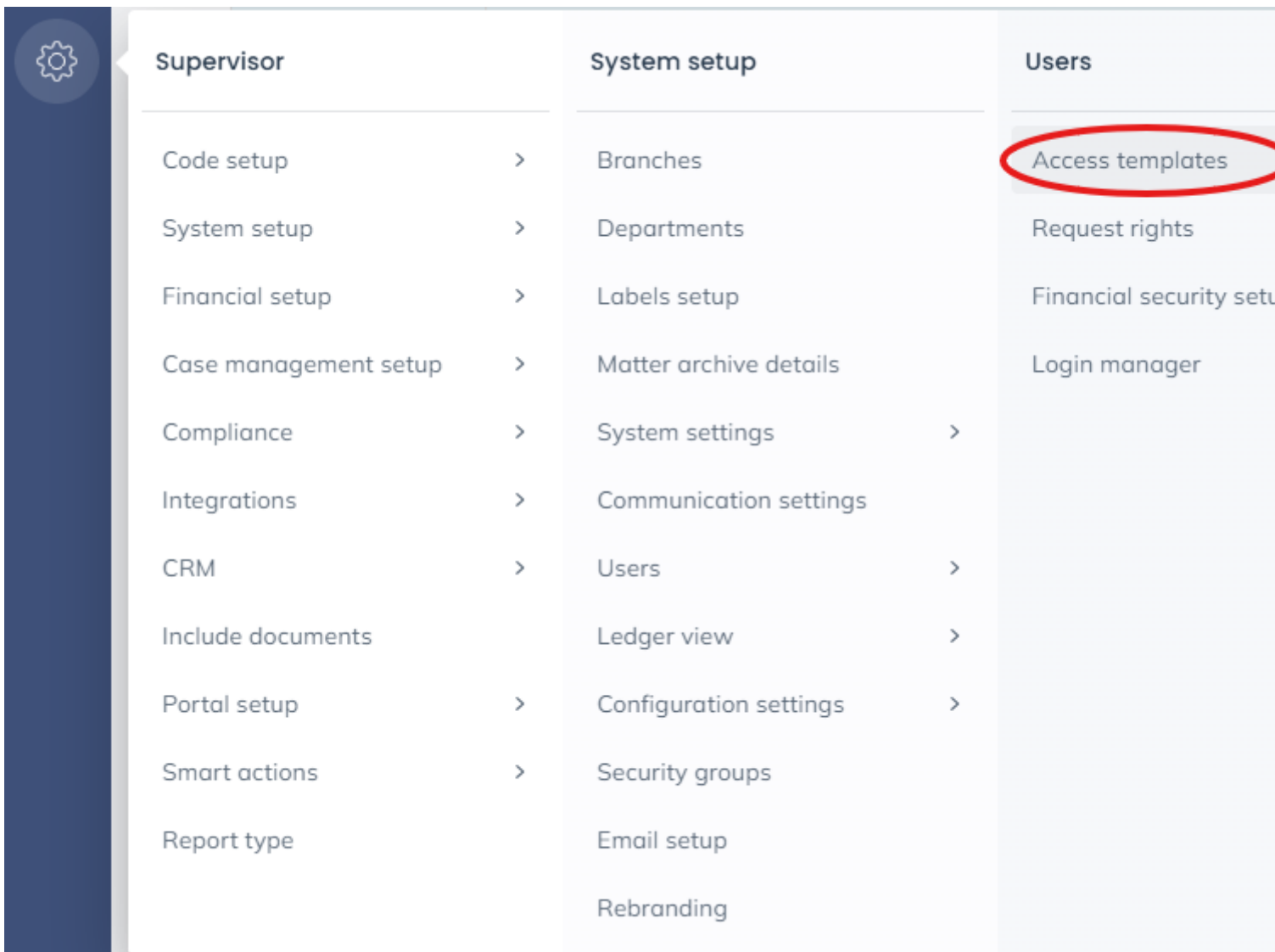
Click Save, and a copy of the selected template will be made.

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.



Supervisor	System setup	Users
Code setup >	Branches	Access templates
System setup >	Departments	Request rights
Financial setup >	Labels setup	Financial security setu
Case management setup >	Matter archive details	Login manager
Compliance >	System settings >	
Integrations >	Communication settings	
CRM >	Users >	
Include documents	Ledger view >	
Portal setup >	Configuration settings >	
Smart actions >	Security groups	
Report type	Email setup	
	Rebranding	

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.

Access templates













[+ New](#)[Export](#)

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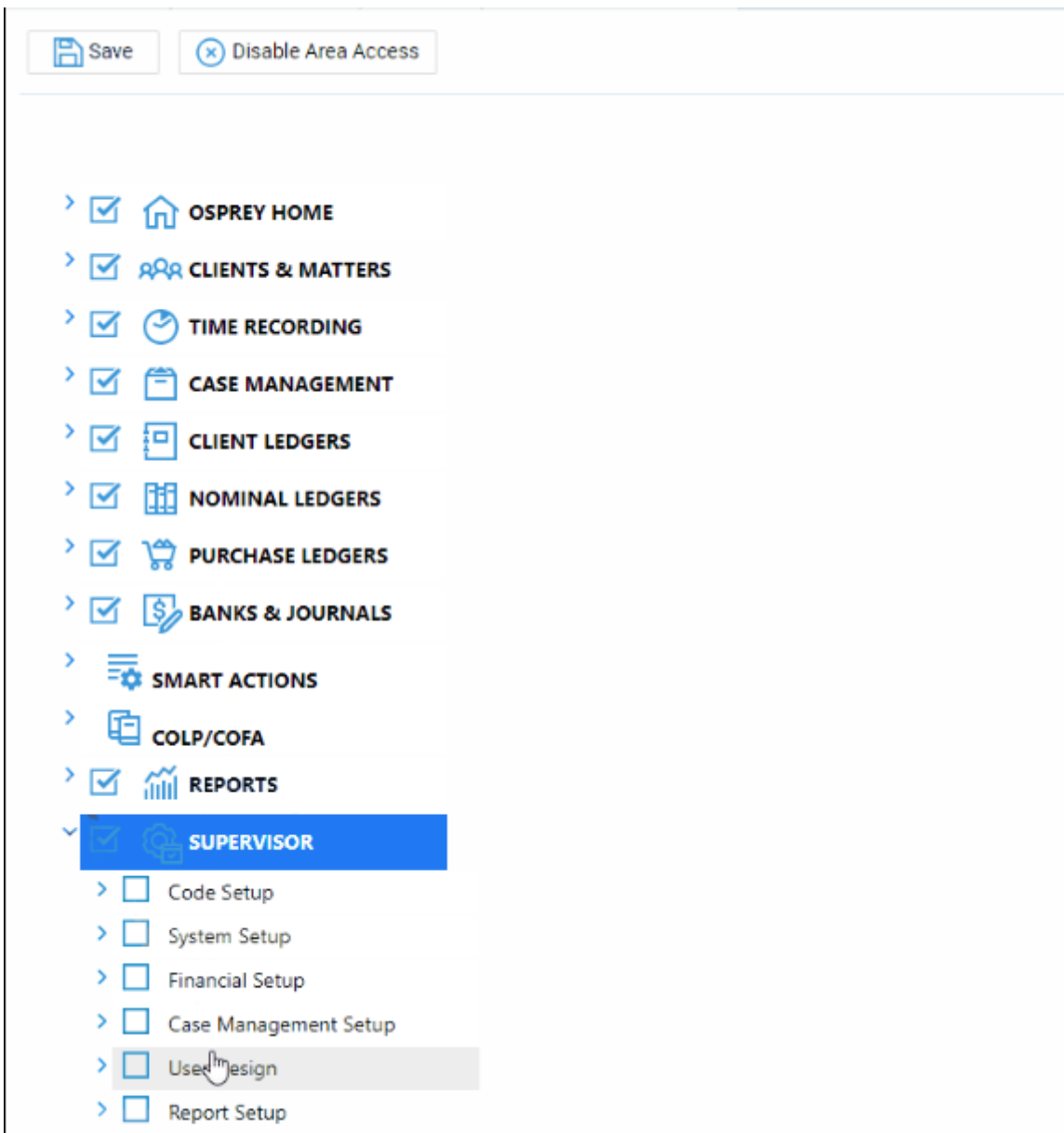
The next screen will display a list of the areas of Osprey on one side and a series of check boxes on the other.

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.

Supervisor > System setup > Users

Users

[+ Add](#) [Export](#) [Refresh](#) [Clear UI state](#)


USER ID	TEMPLATE NAME
<input type="text"/>	<input type="text"/>
ADAM	Supervisor
ALINA	Supervisor
CHELSEA	Supervisor
ELLIE	Supervisor
EMILY	Supervisor
GODOFTHUNDER	Supervisor
GR01	Supervisor
INFOTRACK	Supervisor
JESSICA	Supervisor
KAY	Supervisor

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

Add/edit users

 Save  Cancel  Archive

User Id:

Template: 

Email:

Fee Earner:

Redirect Keydates:


StylePath:

Preferred Ledged View:

Financial Security View:

Posting Type View:

Financial Security View: 

Posting Type View: 

Password Expires:

(Information Only.)

User Licence: 

(0 Loyalty Licences Available.)