

# Osprey Approach: Managing Users

This help guide was last updated on  
Oct 31st, 2023

The latest version is always online at  
<https://support.ospreyapproach.com/?p=241>

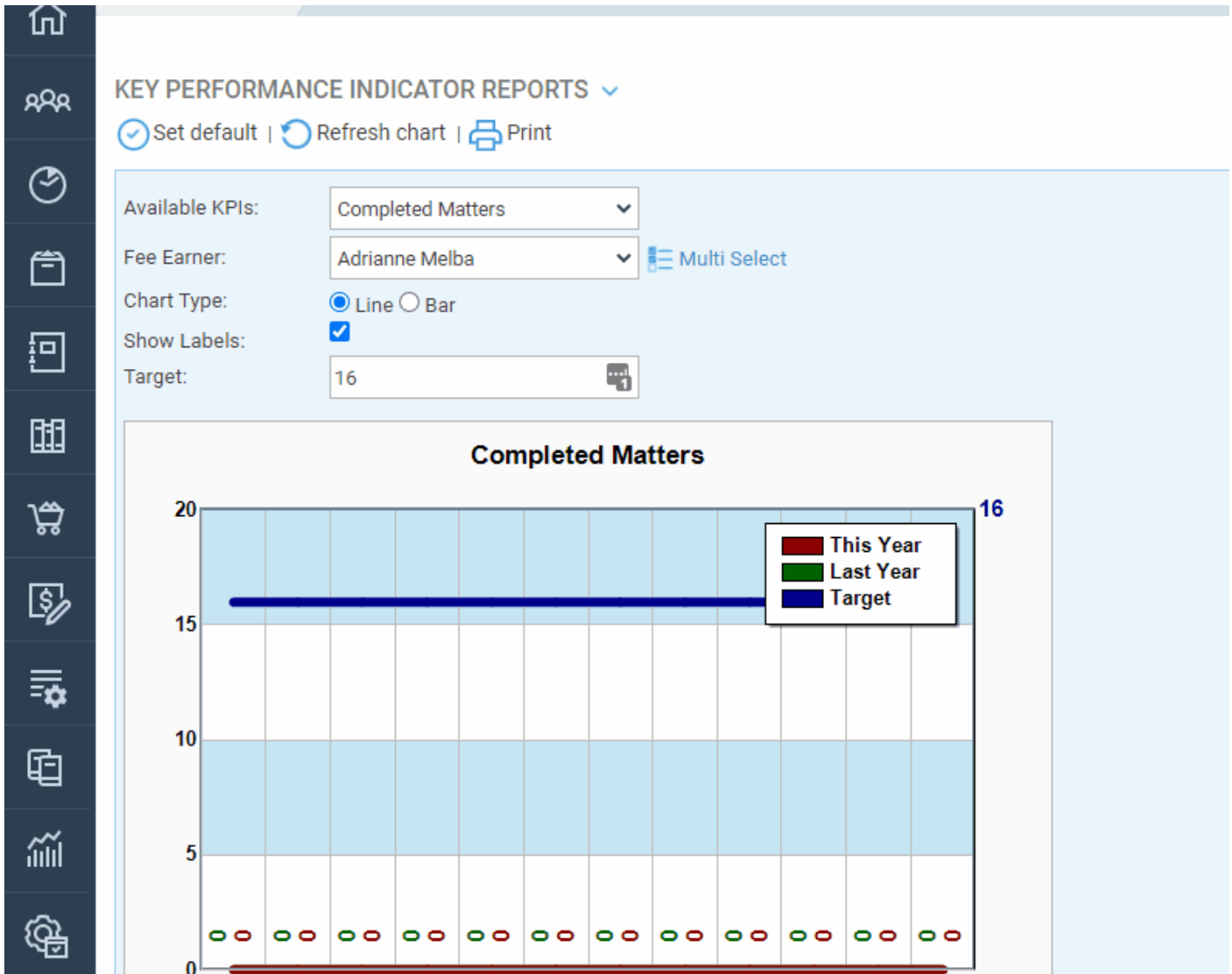
[Click here for a printer-friendly version](#)



As your firm grows, you will need to add more users to allow them access to the software. This guide will take you through adding them and ensuring that they have the correct level of access.

Please note that only Supervisor level users will be able to add and amend users, but you will need to contact us to have them activated.

## Add a New User




Select Supervisor > System Setup > Users > Add User


- **User ID** - This will be the user's login name. Please note that spaces and special characters cannot be used in the User ID.
- **Template** - Select a relevant level of access for your user to have from this list.
- **Email** - Enter the user's email address here. Please note that this is a compulsory field.
- **Fee Earner** - If the user is a Fee Earner, select them from this list. Please note that they must first be added as a Fee Earner in the Supervisor > Code Setup > Fee Earners area.


- **Redirect Keydates** - Use this to redirect any key dates from another fee earner to this user. This can be useful if a fee earner is on leave to ensure that important dates are not missed.
- The **Stylepath, Preferred Ledger View, Financial Security View** and **Posting Type View** can all be left unchanged. These fields give customised options to the way the user views information.
- **Must Change Password** - If this option is selected it will force the user to change their password after the designated number of days have elapsed. If you do not wish to force a password change, leave this unticked.
- **Limit Number of Logins** - This enables you to restrict the number of times a user can log in. Leave this option unticked if you do not want to apply this restriction.
- **Password & Confirm Password** - Enter the password for the user here. Please note that we do not store user's passwords and will be unable to get this information for you should a password be forgotten.
- **User Licence** - When a user is first created, they will be set to inactive by default. To have your new user account activated, please contact support.
- **Supervisor** - Tick this box if the Fee Earner is a Supervising Fee Earner.
- **FE Restricted View** - If this tick box is selected, this will restrict the access of the Fee Earner just to his/her own matters.


User Id:


Template:  


Email:


Fee Earner:  

Redirect Keydates:  

StylePath:  

Preferred Ledged View:  

Financial Security View:  


Posting Type View:  

Must Change Password:

Limit Number of Logins:

Password:  Confirm Password:

Number of Logins Remaining Description:   
(Information Only.)

User Licence:  

Supervisor:

FE Restricted View:

Email signature behaviour:  Inherit from system  Use branch signature  Allow user to select the signature

Email Client:

Once complete, click the 'Save' icon to add your new user to the list.

You will then need to contact us on the above email address or telephone number to have this user activated.

## Deactivate a User Account

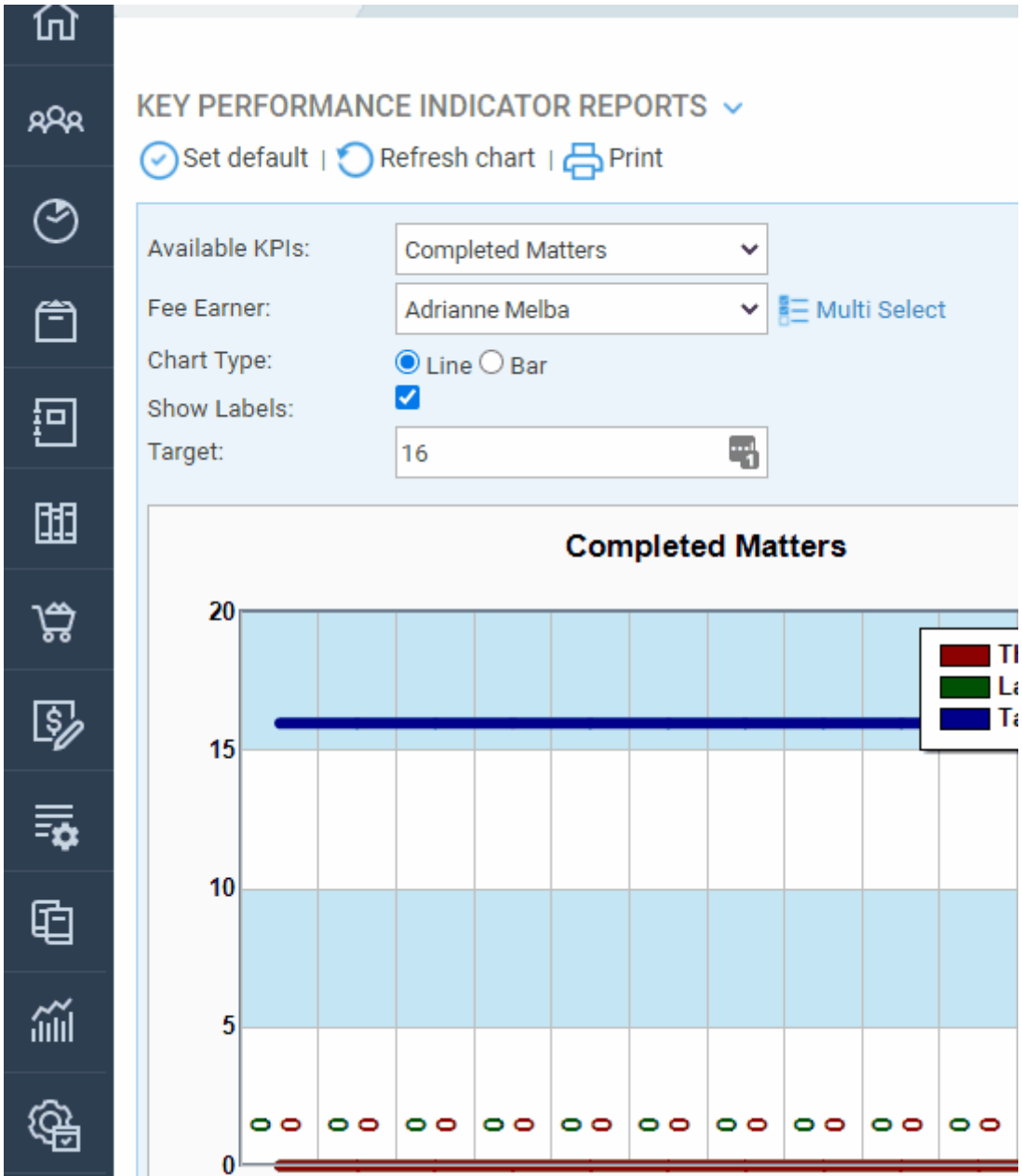
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Should a user account no longer be required, you will be able to deactivate the account and free up a licence to add a new one.

Each user that is created has a unique username and password which they can use to access Osprey from any location with an Internet connection.

Although users may be created and deactivated by any user with Supervisor level access, the activation of the user account is controlled by Practice Ltd. Please call us if you need a user activating.


To deactivate those user(s) that no longer require access navigate to the 'Supervisor' area.




Select Supervisor > System Setup > Users

This shows a complete list of users currently present on Osprey.

Please note that you can only delete a user if they have not done anything traceable either via an Audit Trail or that would show up in the reports.

 Export



 Clear UI state


USER ID	TEMPLATE NAME
AAMB	Supervisor
ADAMC	Senior Case Worker
ADELINI	Supervisor
ADRIAN	Supervisor
ALEXH	Supervisor
ALEXS	Supervisor

Right-click on the user you wish to deactivate and select the 'Edit' option.


The 'Edit User Details' screen will now appear giving you an overview of the selected user.


 Save  Cancel  Archive


User Id:


Template:  


Email:


Fee Earner:  

Redirect Keydates:  

StylePath:  


Preferred Ledged View:  

Financial Security View:  

Posting Type View:  

Password Expires:  (Information Only.)

Number of Logins Remaining Description:  (Information Only.)

User Licence:    
(0 Loyalty Licences Available.)

Go to the 'User Licence' drop-down list and select 'Inactive'.

Now select the 'Save' button at the top of the screen to deactivate this licence. You may receive a pop-up to advise you that this user has been logged out.

Following deactivation, the 'In Use' column on the main user list will now display 'False'.

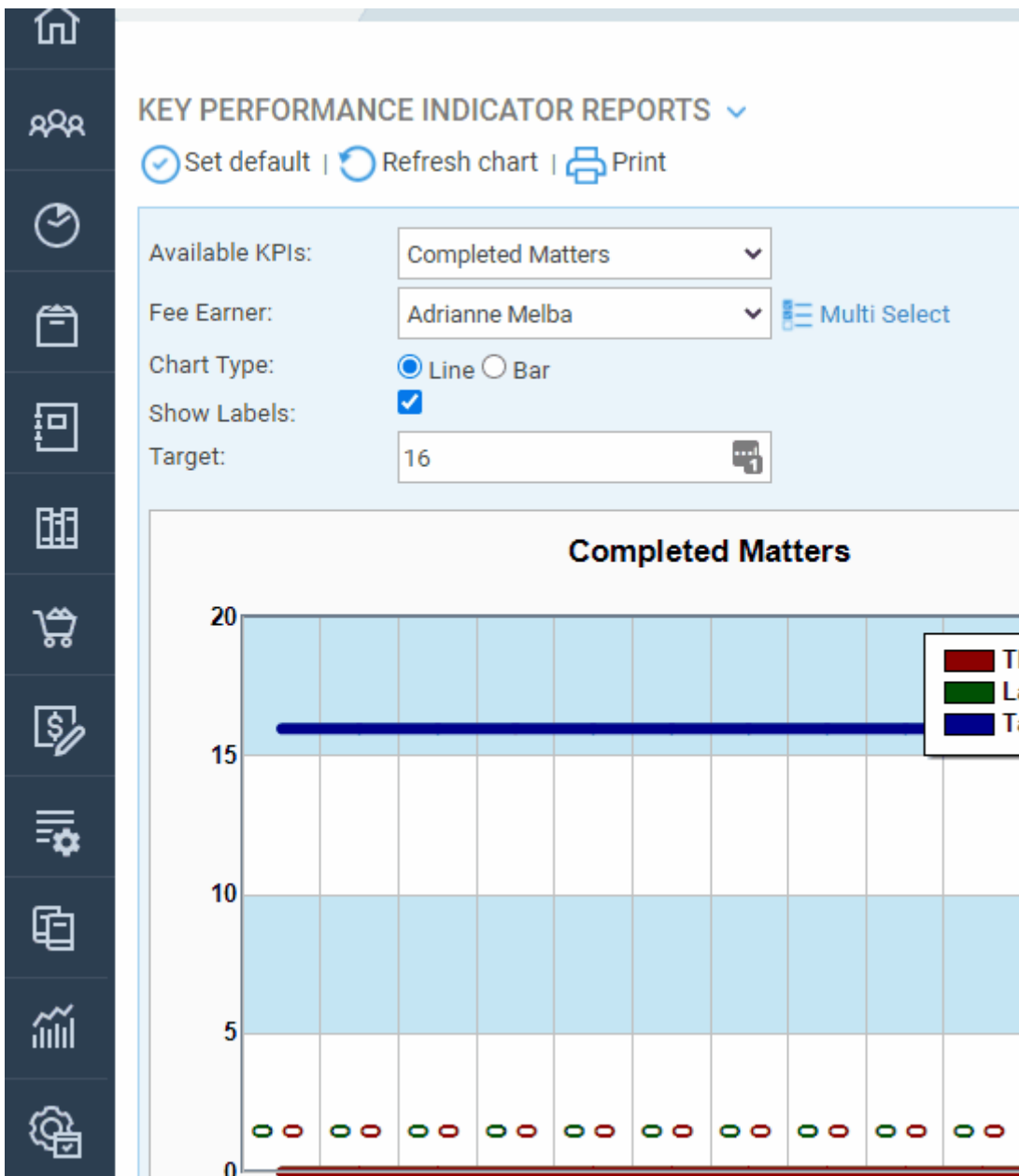


# Reset Your Password (Forgotten password)

All passwords are encrypted for maximum security within the Osprey system, so our support team will be unable to recover any lost passwords.

If you have forgotten your password, you can easily reset it from the login screen. Click here to go to our guide for Forgotten Passwords.

## Supervisor – Reset another user's Password



Select Supervisor > System Setup > Users

Your user list will now be displayed. Check the 'Email Address' column next to the relevant user to make sure that their email address is accurate – As this is the email address to which the new temporary password will be sent.

If you wish to change the email address, right click the mouse on the relevant user and select the 'Edit' button.

Now enter a new email address in the available box. Now click 'Save' to confirm the change.

When you are happy with the email address, right-click and then select the 'Change Password' option.

USER ID	TEMPLATE NAME	EMAIL ADDRESS	FEE EARNER	IN USE
ALEX	Supervisor	alex@alex.dev.cbiz.ro	TESTER	●
ALINA	Supervisor	alina@norsoft.ro		●
ANDY	Supervisor	neil@oracctice.net	BF	●
BECKY	Supervisor		BF	●
BECKYS	Supervisor		BS	●

- Edit
- Change Password**
- Temporary Access
- Designation Link
- Delete

 Save  Cancel

User Id:

Must Change Password:

Number of Sign Ins Remaining:

Current Password:

New Password:

Confirm Password:

Reset Password:  **If you choose to reset the password, a new random password is generated and sent to the user!**

If you know the user's password and wish to change it manually, enter the current password in the available box, then enter a new password in the subsequent two boxes. Click 'Save' to change the password.

If you wish to reset the user's password, tick the 'Reset Password' box and then click 'Save'. The user will receive an automated email from the system giving them a new randomly generated password.

Dear RICHARD,

Welcome to our case tracking facility.

Your login details are as follows:

UserID = RICHARD

Password = iDa0kMonof

To access our case tracking facilities please follow the link: <https://testv75.osprey.tm/main/>

When they then log in using this password for the first time, it will force them to change the password again to something they will remember.

## Log Out a User

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If a user has not logged out of the software correctly by simply closing the browser rather than using the Sign Out option in the top right hand corner:



you may find they receive the following message:

Message from webpage

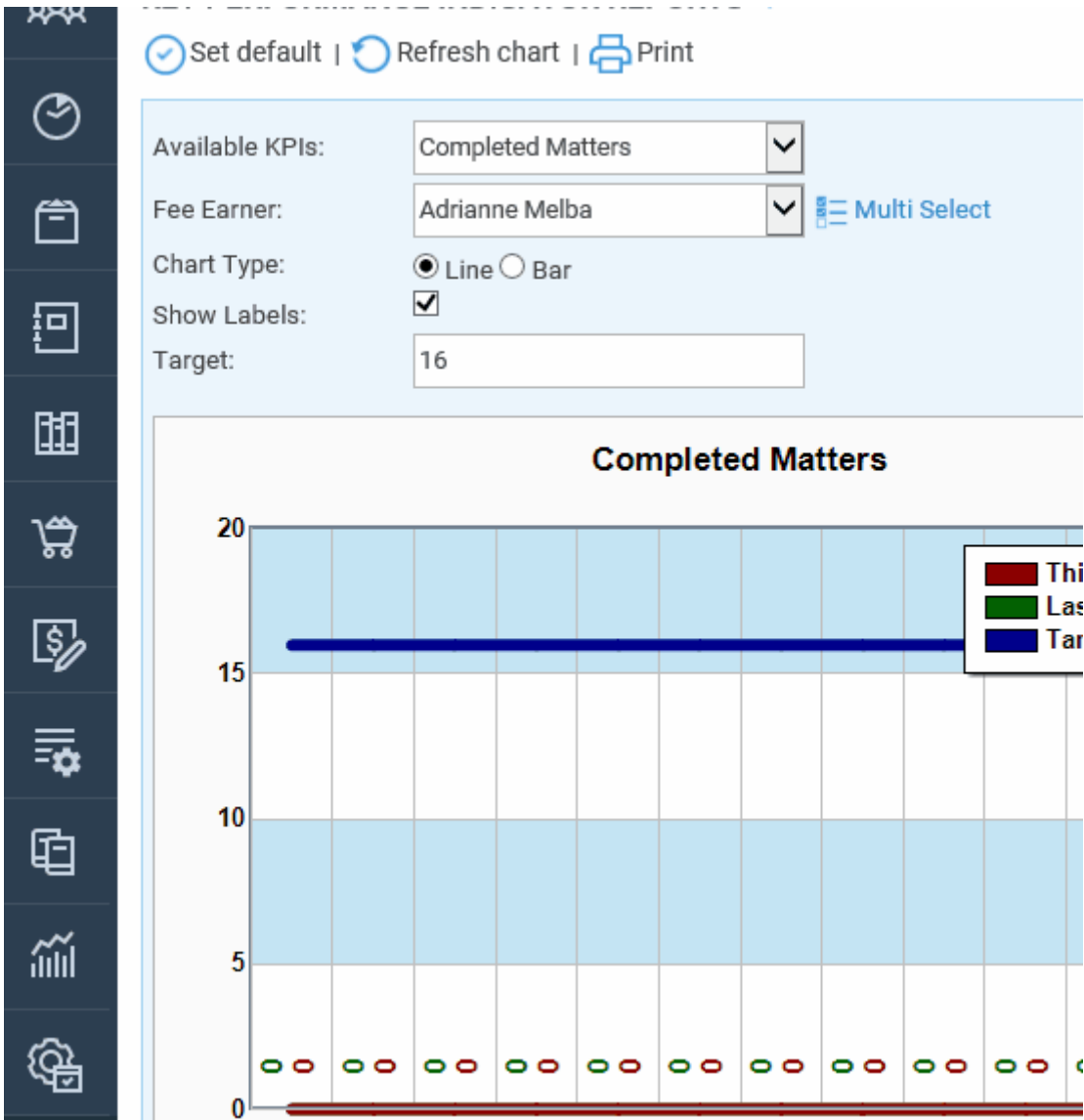


The system reports you are logged into another machine. This could be because Osprey was closed without logging out first. Press OK to log you out of the other machine and continue working here.

OK

Cancel

Supervisor users can log other users out.



Supervisor > Tools & Utilities > Login Manager

Now right click the user you wish to log out of the system, and left click Logout:

Osprey Approach Practice Ltd

Global search

Supervisor > Tools & Utilities > Login Manager

Total Users Logged In: 2  
 Total Loyalty Users Online: 0  
 Total Flexi Users Logged In: 2  
 Maximum Flexi Users Allowed Online: 2

USER ID	DATE/TIME LOGGED IN	LICENCE TYPE
MITZI	19/10/2020 12:13:54	Flexi
SUPERVISOR	19/10/2020 09:40:00	Flexi

Logout