



Osprey Approach: Enable Matter Restrictions

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Dec 20th, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=46097>



Osprey allows you to lock access to matters for certain staff members only, to ensure that your client data is kept secure and confidential. There are two options.

- Set permissions for all matters automatically - When you use this option, only the matter fee earner, supervising fee earner, and users set as supervisors can access matters.
- Set permissions manually per matter for users or security groups - This option enables you to lock down individual matters manually so that only certain users or security groups of users can access them.

Set permissions for all matters automatically

Use this option if you want all matters to only be accessible by the Matter Fee Earner, Supervising Fee earner, and users set up as Supervisors.



From the Supervisor menu in the browser, select System Setup > Configuration Settings. Search for "matter" in the top right of the screen, and right click Matter Restricted Access. Select Edit.

The screenshot shows the 'Configuration Settings' page in the Osprey system. At the top, there are three tabs: 'Supervisor', 'System Setup', and 'Configuration Settings'. Below the tabs are two buttons: 'Export' and a refresh icon. A list of settings follows, each with a label and a corresponding switch. The 'Matter Restricted Access' switch is highlighted with a yellow border. To the right of this switch is a blue 'Edit' button with a pencil icon. Other settings visible include 'Enable Task Run From Key Dates', 'Expert Type Filtering', 'Fee Earner Restricted View', 'General costs fe code', 'Granted Local Admin Access', 'Hide cheque requisitions on Client Ledger', 'Label Printing', 'Matter History Folder', and 'Merge Contact DX'.

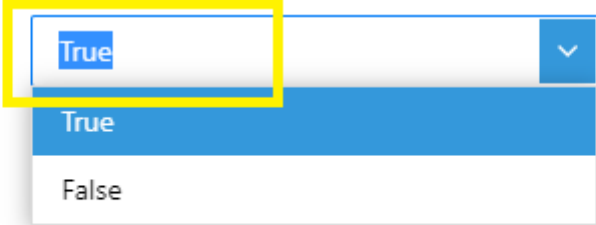
SWITCH NAME
Enable Task Run From Key Dates
Expert Type Filtering
Fee Earner Restricted View
General costs fe code
Granted Local Admin Access
Hide cheque requisitions on Client Ledger
Label Printing
Matter History Folder
Matter Restricted Access
Merge Contact DX

Ensure that the switch is set to **True** and click Save:

Supervisor > System Setup > Configuration Settings > > Edit

 Save  Cancel

Switch Name: Matter Restricted Access

Switch Value: 

Now, only the Matter and Supervising Fee Earners will be able to access each matter, along with Supervisor users:

Search Results

[Search Again](#)

Client/Matter A00001/1 Matter Description Admin Matter Fee Earner Thomas Petty	Client Name Admin Work Type CONVEY
Client/Matter SH0000001/1 Matter Description Personal injury claim Fee Earner Bermont Tench	Client Name Chidi Anagonye Work Type CONVEY
Client/Matter BE0001/1 Matter Description Conveyancing Fee Earner Mitzi Broom	Client Name Gordon Bennett Work Type CONVEY
Client/Matter BE0001/2 Matter Description New Matter 5th Feb Fee Earner Bermont Tench	Client Name Gordon Bennett Work Type CONVEY
Client/Matter BE0001/3 Matter Description Test matter Fee Earner Bermont Tench	Client Name Gordon Bennett Work Type RISK

Error

You do not have permission to view this client/matter

Ok

Manually set permissions on individual matters

To protect sensitive matters, if a matter has previously been restricted, any new users that have been added will automatically be restricted access.
Any matters that have been restricted will be visible within the **Restricted Matters** report (see [below](#)).

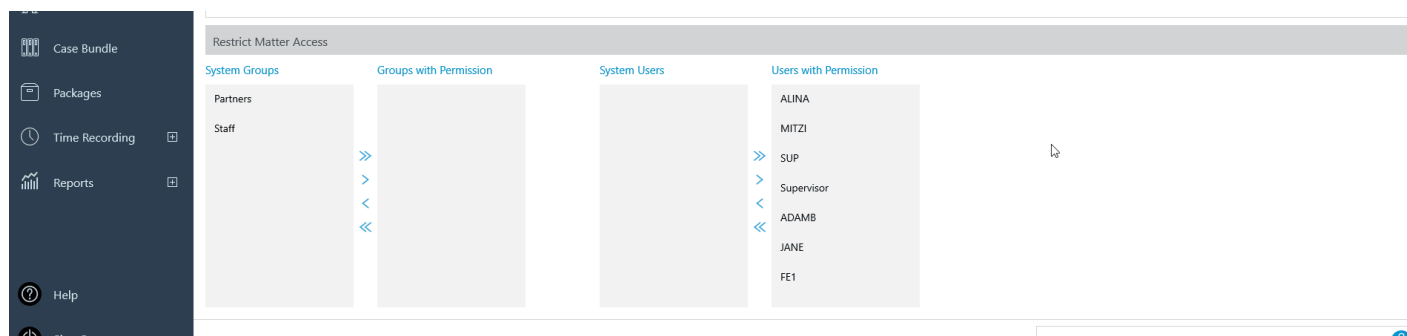
Use this option if you want to manually set permissions on each matter or just a few matters for Users or Security Groups (for more assistance on setting up Security groups click [here](#)). Any matters that you have

not set permissions on will be accessible to everyone. Ensure that the Matter Restricted Access switch in Supervisor > System Setup > Configuration Settings is set to **False** to enable individual matters to be set.

Navigate to the Clients and Matters area (this can be done in the browser or the Case Management App).

Locate and Edit the matter you wish to restrict access to. Scroll down to the bottom of the Edit Matter page. You will see the groups and users on the system in the System Groups and System Users columns. At this stage, ALL groups and users are restricted from the matter. To enable permission, use the chevron to move groups or users to the Groups with Permission or Users with Permission lists, as shown in the video below.

To quickly move all groups/users to the Permission side, use the double chevron button. You can then move the required groups/users for restriction back into the System side using the single chevron.



Save your changes. These users/groups will now be unable to access the matter.

Viewing and Auditing Matter Permissions

There are two reports available in the browser version that you can use to see the matters which have permissions assigned to them. These may need to be enabled in your access template - for more information on editing access templates, click [here](#).

To see a full audit of users who have had their access removed from each matter, select the Reports menu > Miscellaneous > Matter Restriction Audit. This shows each user added or removed from each matter, the date the restriction was added/lifted, and by whom.

Reports Miscellaneous Reports Matter Restriction Audit				
Export Refresh		Search... 🔍 ⌵		
CLIENT/MATTER	MATTER DESCRIPTION	ACCESS	USER	MODIFIED
A00001/1	Admin Matter	JANE removed	supervisor	24/05/2022 02:03
A00001/1	Admin Matter	ADAMB removed	supervisor	24/05/2022 02:03
A00001/1	Admin Matter	FE1 removed	supervisor	24/05/2022 02:03
A00001/1	Admin Matter	ALINA removed	supervisor	24/05/2022 02:03

To see a list of all matters which have been restricted, along with a list of users who have access, select Reports > Miscellaneous > Restricted Matters.

Reports

Miscellaneous Reports

Restricted Matters

Export

Search...

CLIENT/MATTER	MATTER DESCRIPTION	ACCESS
<div></div>	<div></div>	<div></div>
A00001/1	Admin Matter	MITZI, SUP, Supervisor
HA00000001/2	Holiday admin	ADAMB, ALINA, FE1, JANE, MITZI, SUP, Supervisor
TA00000001/1	Breach of ASBO	ADAMB, ALINA, FE1, JANE, MITZI, SUP, Supervisor
TE00000001/1	Possession of firearm	ADAMB, ALINA, FE1, JANE, MITZI, SUP, Supervisor

Both reports can be filtered using the filter row, and exported to Excel/CSV if required.