

Osprey Approach: Quick Start

This help guide was last updated on
Jan 24th, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=51476>



Osprey Approach has its own report writing software which can be used to create your own custom reports. To use the report writer your Osprey user must be linked to the Supervisor access template, and you will need permissions on your local machine to enable installation of the report writer software. Please click on the links on the right for further information.

Prior to taking the Report Designer course, please check all of the following. Failure to do so may result in the training being postponed.

If you wish to create your first report during training, please ensure that you have first filled in and returned the [Osprey Approach Report Specification Form](#) to our support team. Our team will ensure that a data set is created prior to the training being booked in which you can use to create your report.

Check Access Template to ensure all relevant areas are accessible

When logged in as a Supervisor user, ensure you can see the following areas:














- Reports > Reports (New) and the list of currently available reports:



The screenshot displays the Osprey Approach software interface. On the left is a dark sidebar menu with the 'REPORTS' section expanded to show 'Reports (New)'. The main content area shows the 'Reports (New)' page with a list of report types. At the top right, there are status indicators for 'Today's Units: 0', 'Today's Time: 00h:00m', and 'Today's Value: £0.00', along with a 'Global search' bar. The report types listed are:

Report Type
Accounting Reports
Analysis Reports
Auditing Reports
Case Management Reports
COLP and COFA Reports
CQS Compliance
Default

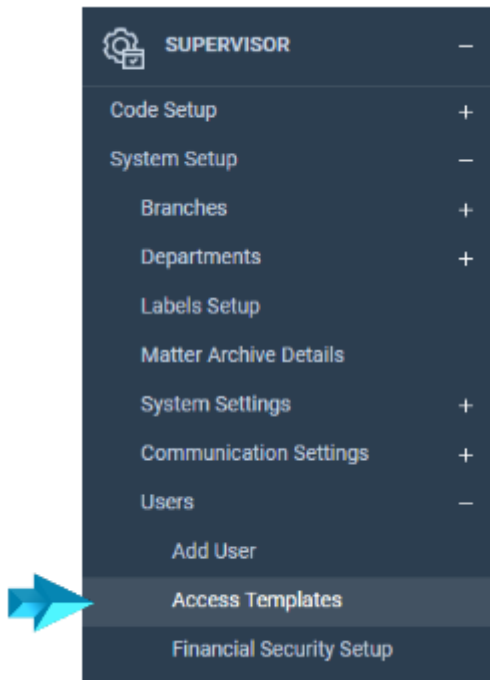
- Supervisor > Report Setup > Report Type:

SUPERVISOR		DESCRIPTION
	Code Setup	Contains Accou
	System Setup	Contains Analy
	Financial Setup	Contains repor
	Case Management Setup	Contains Case
	User Design	
	Report Setup	Report Type
	Tools & Utilities	
	Financial Periods	Contains repor
	CRM-AF1 Additional Rates	Contains repor
	CRM Auto Posting Defaults	
	Reprint CRM611 Spreadsheet	
	Include Documents	
	Portal Setup	

If you do not have access to either of these areas, please follow the steps below.

Go to the Supervisor area of Osprey and then select 'System Settings'. When the menu appears, click on 'Users' and then 'Access Templates'.

This will open a list of the areas of Osprey which can then be edited to allow access for users linked to a specific template.



Edit the 'Supervisor' template and scroll toward the bottom of the list of Supervisor check boxes. Ensure the areas displayed below are checked:



In order to allow users access to any saved reports, ensure that the following options are checked against any relevant access template under the Reports area.

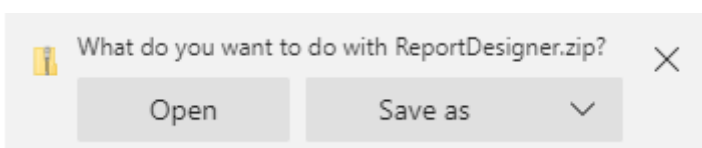


Install the Report Designer software

Ensure that you have installed the Report Designer software on the PC that you intend to perform the training session on, using the link below. This may require administrator rights, so we recommend that you discuss this with your IT team.

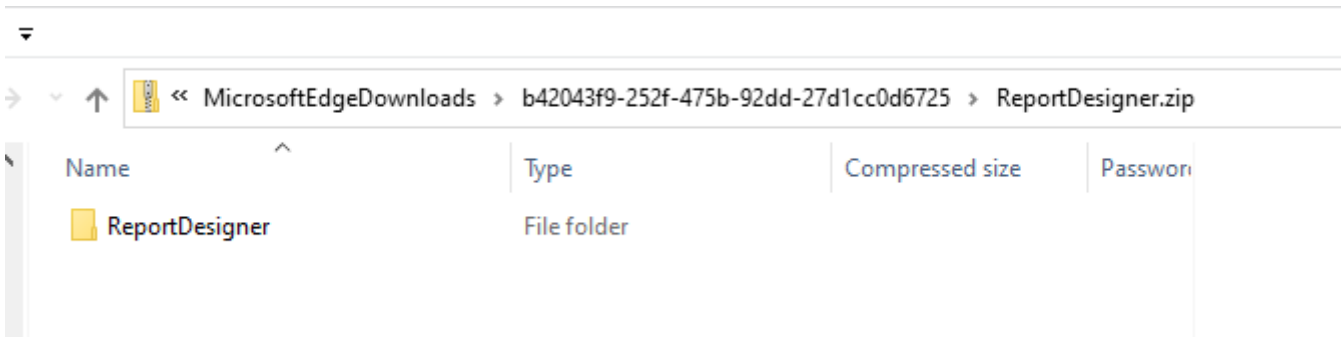
<https://apps.ospreyapproach.com/products/tools/ReportDesigner/ReportDesigner.zip>

Click the link above, and a box similar to the below will open:

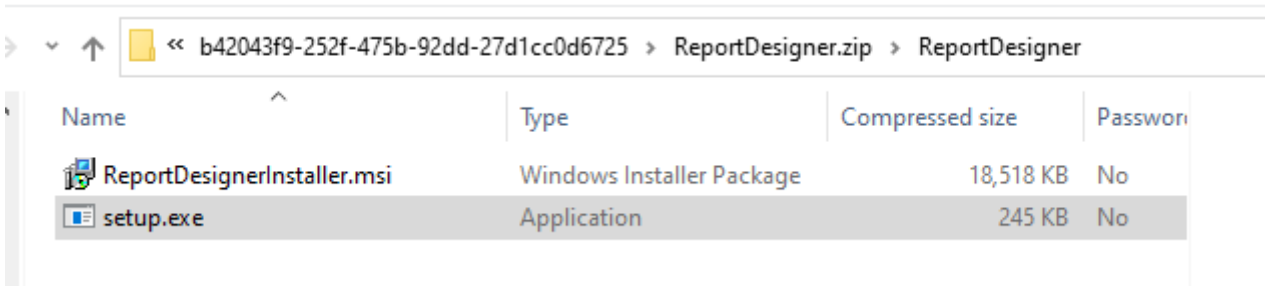


Click Open.

A File Explorer box will open:



Double click the ReportDesigner folder, then double click the setup.exe file:



Follow the instructions to install the Report Designer.

Once installed, the Report Writer will be available on your computer. The icon is shown below. You can search for the application in the bottom left hand corner search box, or select it from the Programs menu.

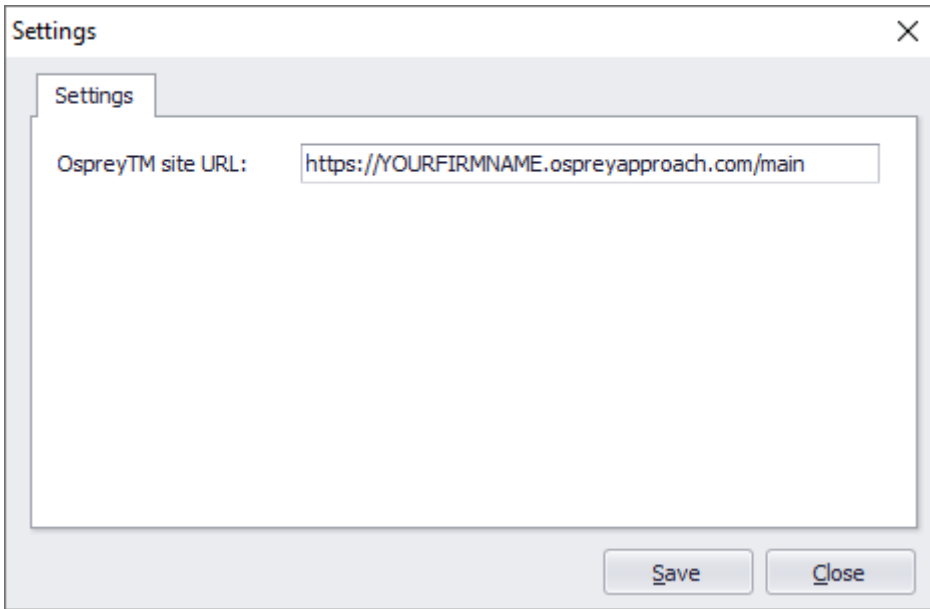


Be aware that the .NET Framework 4 will need to be installed on your computer to enable you to use the Report Writer. When installing the software for the first time, you will be prompted to download it if this is not found. Please note that this is simply a Microsoft update and can be downloaded from their website should the prompt not appear. If any assistance is required, please contact your network administrator.

Set your Osprey URL

You can now select the icon to open the Report Writer.

When using the Report Writer for the first time, you will be prompted to enter the URL for your Osprey database. For example <https://pracctice.ospreyapproach.com/main>.



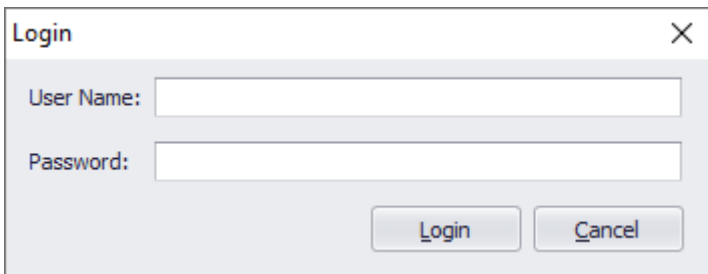
Settings

Settings

OspreyTM site URL:

Save Close

Once entered, you must supply your Osprey username and password. In order to log in your user name must be set up to use the Supervisor access template.



Login

User Name:


Password:

Login Cancel

Select 'Login' to access the Report Writer and begin creating your reports. If any assistance is required in terms of creating and editing reports, please contact our Support team on 03300 604 940.

Ensure your User ID is set up to use the Supervisor Template

Ensure that your Osprey User ID is linked to the Supervisor access template – only Supervisor users are permitted to log in to the report designer. This can be checked from Supervisor > System Setup > Users:

 Export Clear UI state

USER ID	TEMPLATE NAME
ALEXH	Supervisor
DAVE	Supervisor
ROBJ	Supervisor
Supervisor	Supervisor
SUPERVISOR2	Supervisor
SUPERVISOR3	Supervisor
USER	Case Worker

More Report Writer Links
