

Osprey Approach: Setting Access Permissions in Reports (New)

This help guide was last updated on
Jun 5th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=68052>

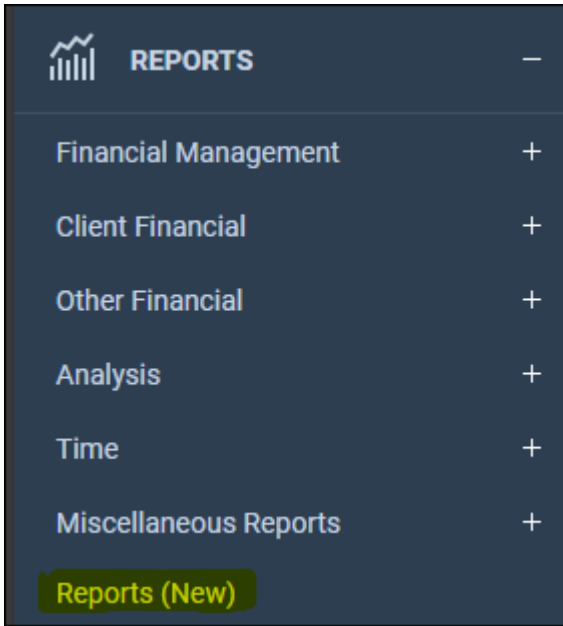


This guide will take you through setting access permissions on your reports library

By default, every user whose access template allows them to see **Reports (New)** will be able to run all of the reports in there.

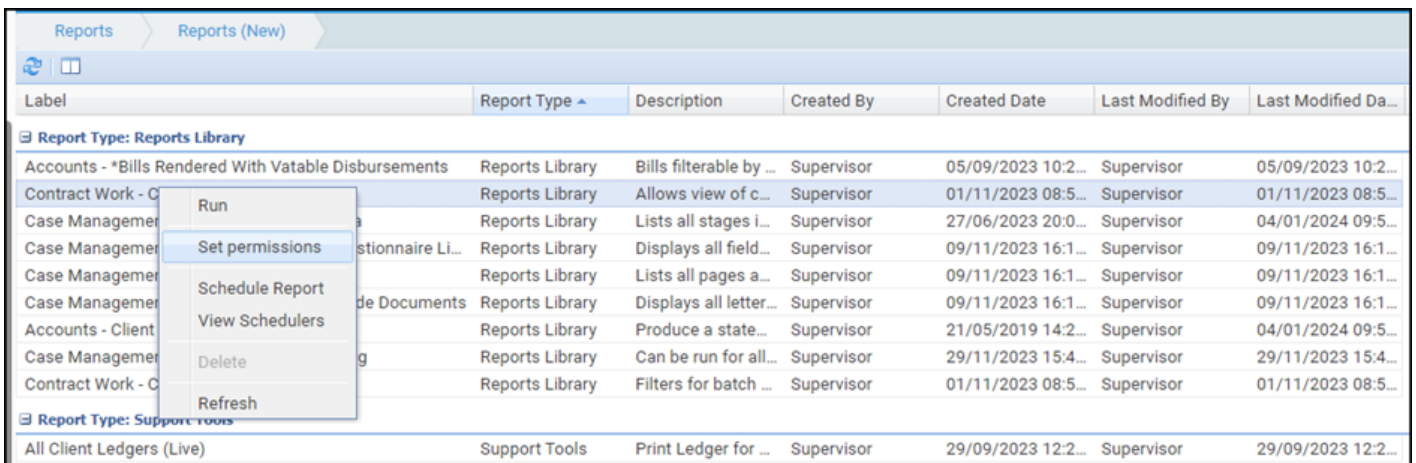
You may wish to limit access to certain reports in the **Reports (New)** section of Osprey

Firstly, navigate to **Reports (New)**



You will then see all the reports available to you.

Right click on a report that you want to amend access too and select **Set permissions**

A screenshot of a web application interface showing a table of reports. The table has columns for 'Label', 'Report Type', 'Description', 'Created By', 'Created Date', 'Last Modified By', and 'Last Modified Date'. A context menu is open over one of the rows, showing options: 'Run', 'Set permissions', 'Schedule Report', 'View Schedulers', 'Delete', and 'Refresh'. The 'Set permissions' option is highlighted in blue. The table content includes various report labels like 'Accounts - *Bills Rendered With Vatable Disbursements', 'Contract Work - C...', 'Case Management...', 'Case Management...', 'Case Management...', 'Accounts - Client...', 'Case Management...', 'Contract Work - C...', and 'All Client Ledgers (Live)'. The 'Report Type' for most is 'Reports Library', and for the last row, it is 'Support Tools'.

A box will open that will allow you to set access to the report via **Users**

Set permissions (Report: Contract Work - CRM6 Validation Checker)

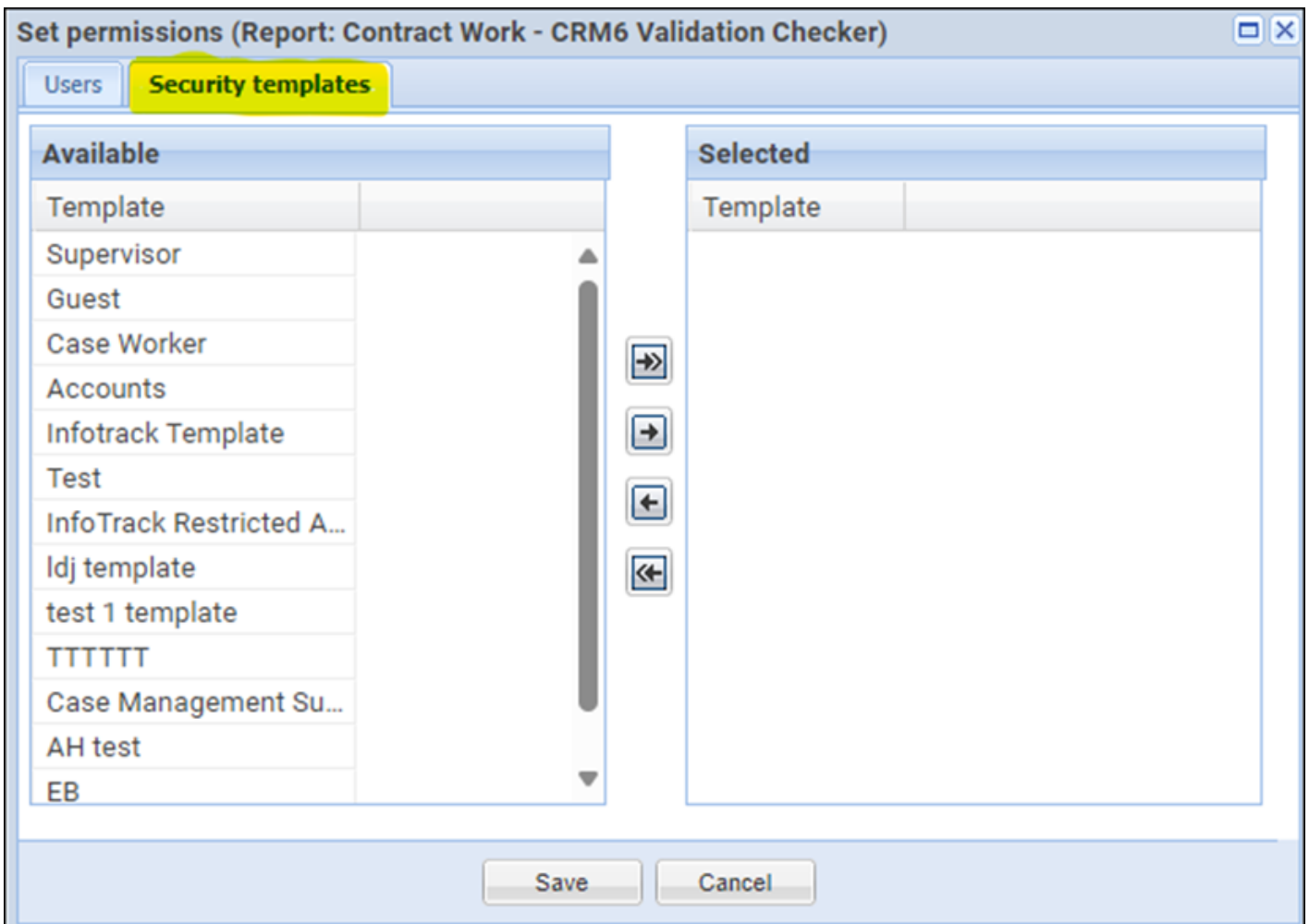
Users Security templates

Available	
User id	User email
NEW USER	neil@pracctice.net
ADAM	adam@pracctice.net
ADELINI	testcbs8@outlook.c...
ALEXH	AlexH@pracctice.net
ALIN	alin.custura@cbiz.ro
ALINA	alina@norsoft.ro
AMY	amyb@pracctice.net
ANCA	chelsea@pracctice....
ANDREI	dragos@norsoft.ro
BENK	benk@pracctice.net
BRONTAE	brontae@pracctice....
CARLY	carly@pracctice.net
CARLYTEST	carly@pracctice.net

Selected	
User id	User email

Save Cancel

Or via Security Templates



The double arrow pointing to the right, at the top will move over all users or templates into the **Selected** window and grant them all access to the report.

The single arrow pointing to the right, allows you to click on one user or template and move them to the **Selected** window, granting them access to the report.



The left pointing arrows allow you to remove access permissions for users or templates.

Once you have set the required access permissions, click **Save** at the bottom of the box.

Save

Cancel