

# Osprey Approach: Setting Up Security Groups

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The latest version is always online at  
<https://support.ospreyapproach.com/?p=63766>

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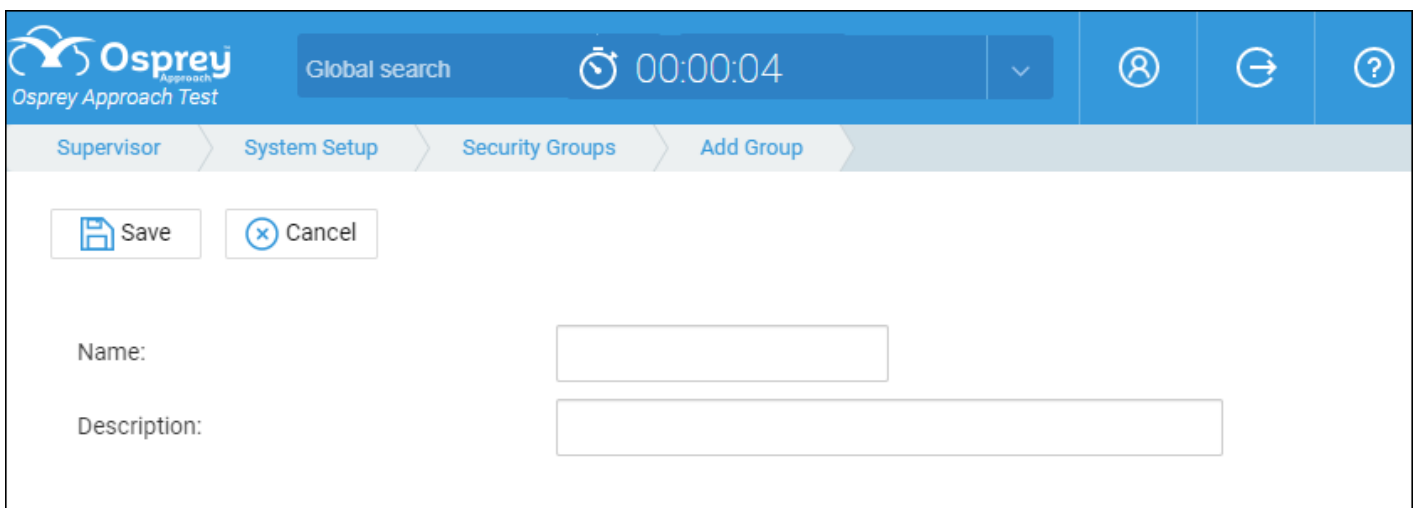
# This guide will go through setting up security groups, making it easier to apply permissions throughout Osprey

You could set these up as departments to ensure that staff in your conveyancing team are unable to view documents for family matters for example, or the groups could be designed around your staff members seniority.

## Set up Security Groups

Navigate to Supervisor > System Setup > Security Groups and click on Add Group.

Select New at the top of the screen to bring up the following area:

The screenshot shows the 'Add Group' form in the Osprey system. At the top is a blue header bar with the Osprey logo, a global search bar, a timer showing 00:00:04, and three icons: a person, a refresh arrow, and a question mark. Below the header is a breadcrumb trail: Supervisor > System Setup > Security Groups > Add Group. The main form area contains two buttons at the top: 'Save' with a floppy disk icon and 'Cancel' with a red 'X' icon. Below these are two input fields: 'Name:' with a text box and 'Description:' with a larger text box.

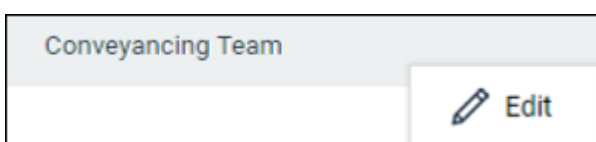
Enter an appropriate name for your Group.

For example, Conveyancing Team or All Staff and then enter a description, which would generally be the same as the name of the group.

Select Save and repeat for any further groups as required.

## Linking users to groups

Users now need to be linked to any new groups which have been created. Right click on the group you want to link users to and select Edit.

The screenshot shows a single entry for the 'Conveyancing Team' group. It consists of a light grey header bar with the text 'Conveyancing Team' and a white box below it. To the right of the white box is a button with a pencil icon and the text 'Edit'.

Tick the box to the left-hand side of a user's name to link to the selected group, repeat as required and click Save.

Please note that this list of users will include supervisor users and therefore they will still have full permissions.

Supervisor

System Setup

Security Groups

Add Group

Save

Cancel

Export

Search...

<input type="checkbox"/>	USER ID
<input type="checkbox"/>	NEW USER
<input type="checkbox"/>	ADAM
<input type="checkbox"/>	ADAMB
<input type="checkbox"/>	ADAMC