

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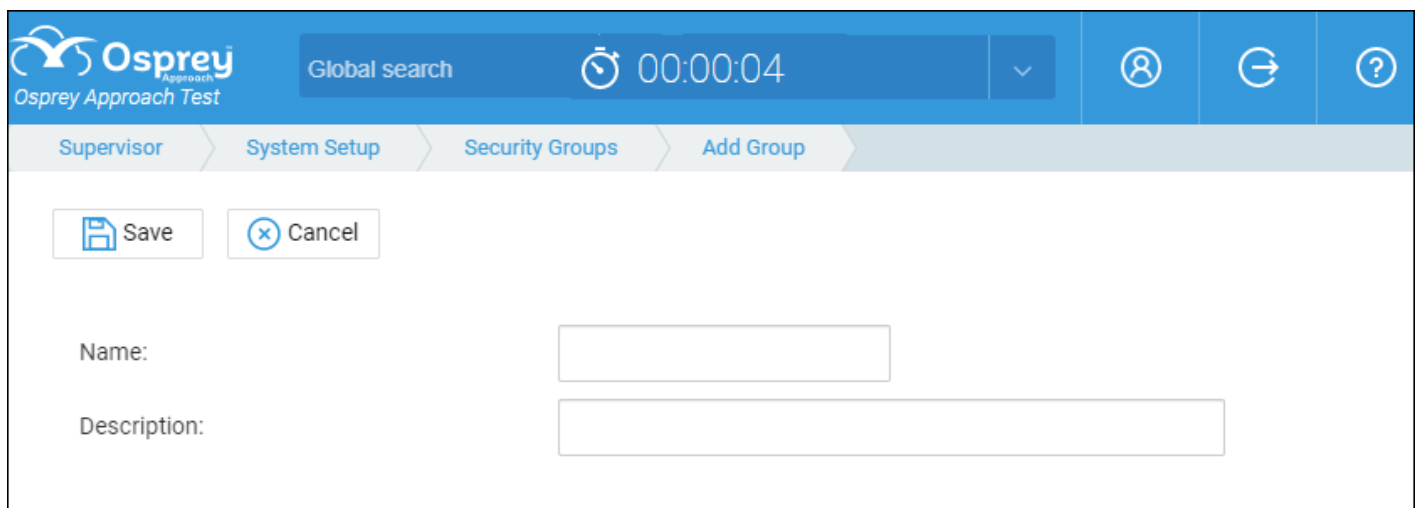
This guide will go through setting up security groups, making it easier to apply permissions throughout Osprey

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 displays the 'Add Group' form in the Osprey system. The top navigation bar includes the Osprey logo, a global search bar, a timer showing 00:00:04, and icons for user profile, back, and help. The breadcrumb trail indicates the current path: Supervisor > System Setup > Security Groups > Add Group. The form itself features a 'Save' button with a floppy disk icon and a 'Cancel' button with a red 'X' icon. Below these are two input fields: 'Name:' and 'Description:'.

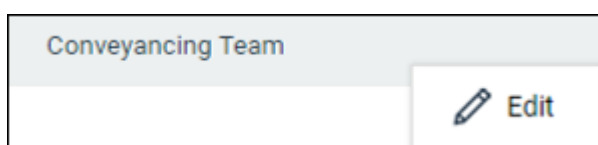
Enter an appropriate name for your Group.

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.



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 Refresh Search...

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