

Osprey Approach: Setting Up Security Groups

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



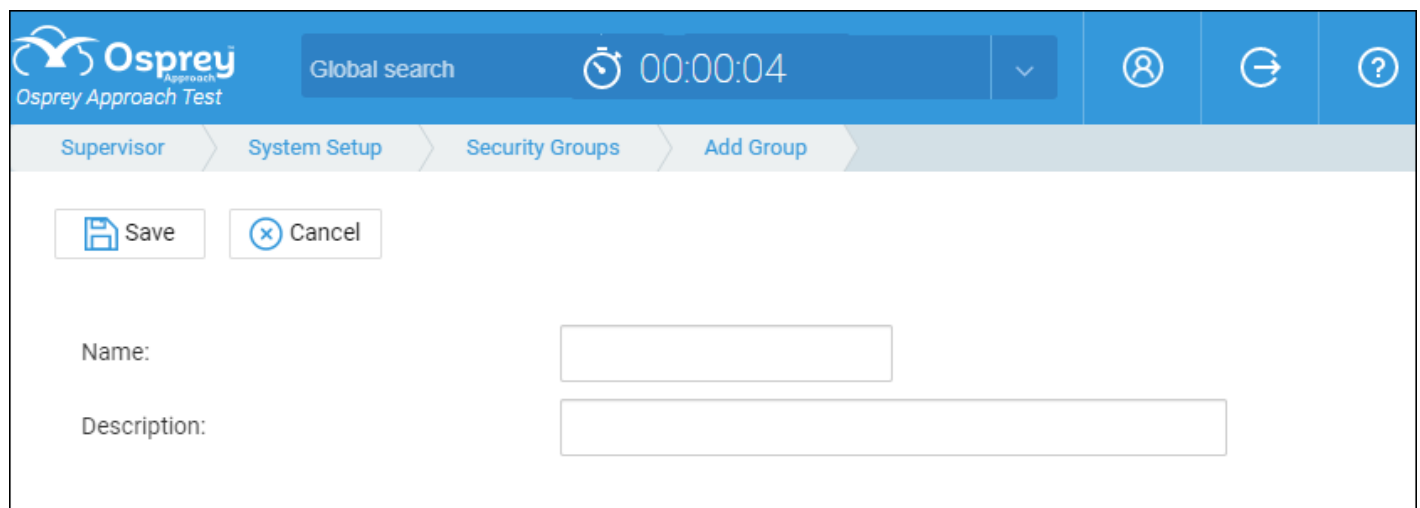
This guide will go through setting up security groups, making it easier to apply permissions throughout Osprey

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 circular icons (user, back, help). Below the header is a breadcrumb trail: 'Supervisor > System Setup > Security Groups > Add Group'. The main form area contains a 'Save' button with a floppy disk icon and a 'Cancel' button with a red 'X' icon. Below these are two text input fields: 'Name:' and 'Description:'. The 'Name' field is a single-line text box, and the 'Description' field is a multi-line text box.

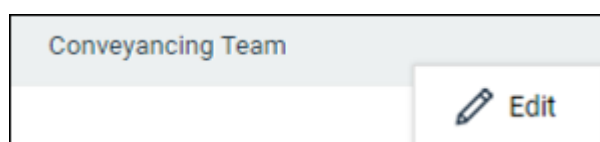
Enter an appropriate name for your Group.

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 list item for the 'Conveyancing Team' group. It consists of a light grey rectangular box with the text 'Conveyancing Team' on the left and a smaller white box on the right containing a pencil icon and the word '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