Osprey Approach: What are Access Templates?

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The latest version is always online at
https://support.ospreyapproach.com/?p=53344

This guide will go through the access templates available to you and what each one will allow your users to see

Access Templates dictate the level of access a specific user, or group of users, has throughout Osprey.

Osprey comes with 5 default options, depending on their role, but any of these can be customised and cloned, or new ones created, ensuring users in Osprey can only perform the relevant tasks, and any sensitive information is only accessible by those that require it.

> As the Case Management App has been designed specifically for Case Workers, Access Templates will only apply to users accessing Osprey via the web browser.
> The only exception is that users on the Supervisor access template will have access to modify letter templates from within the App.

Supervisor

Suitable for: Office Managers, Partners, Principles, Directors, Head of Departments.

This is the highest-level permission available and is required to also use the Osprey Report writer and perform a range of actions not available to any other template, including deleting other user's documents, managing users and setting permissions.

Access to:

- Clients & Matters
- Time Recording
- Case Management
- Client Ledgers
- Accounts
- Banks & Journals
- Approve/Reject Requisitions
- Reports
- Supervisor
- Report Writer

Restricted Access:

- None

Case Management User

Suitable for: Case Workers, Solicitors, Assistants, Paralegals, Secretaries.

Focusing on clients, this will allow users to create, view and edit clients and matters, record time, raise requisitions and carry out casework on files.

Access to:

- Clients & Matters
- Time Recording
- Case Management
- Client Ledger
- Requisitions

Restricted Access:

- Accounts
- Supervisor
- Reports

Accounts

Suitable for: Accountants, Head of Accounts, Bookkeepers.

With limited access to Supervisor Setup, the Accounts template offers the ability to not only post financial postings, but also configure several financial areas, such as the ability to add new Nominals and Banks, accessing the Making Tax Digital portal and running Month and Year ends (this also requires Month End Financial Template),

Access to:

- Clients & Matters
- Time Recording
- Client Ledgers
- Nominal Ledger
- Purchase Ledger
- Banks and Journals
- Approve/Reject Requisitions
- Reports
- Supervisor Financial Setup
  (Setting up bill templates, banks etc)
- Making Tax Digital

Restricted Access:

- Case Management

If using the Month End Financial Template

- Month End
- Year End

Cashier

Suitable for: Legal Cashiers.

This is similar to the Accounts Access Template, however not offering the functionality to customise the financial areas, submit VAT returns, run month ends.

Access to:

- Clients & Matters
- Time Recording
- Client Ledger
- Nominal Ledgers
- Purchase Ledgers
- Banks and Journals
- Approve/Reject/Post Requisitions
- Reports

Restricted Access:

- Case Management
- Making Tax Digitial
- Running Month End
- Supervisor Financial Setup

Guest

Suitable for: Auditors, Cost Draftsman.

Suitable for people who only needs to access the system, the Guest access template limits any changes to matters, focusing on viewing client data.

Access to:

- Clients & Matters
  (Read-only)
- Time Ledger
  (Read-only)
- Case Management
  (Read-only)
- Client Ledger
  (Read-only)

Restricted Access:

- Accounts
- Reports

Note: Financial Templates can be used in conjunction with the access templates, allowing supervisors to run Month End, or specific users to post outside the current period.

As all firms have different needs, any of these above profiles are just guidelines, and can be amended and adjusted to fit your requirements.