

Report Writer Check List

Prior to taking the Report Designer course, please check the following. Failure to do so may result in the training being postponed.

- When logged in as a Supervisor user, you can see the following areas:**

Reports > Reports (New) and the list of currently available reports:



Label	Report Type
	Report Type: Accounting Reports
	Report Type: Analysis Reports
	Report Type: Auditing Reports
	Report Type: Case Management Reports
	Report Type: COLP and COFA Reports
	Report Type: CQS Compliance
	Report Type: Default

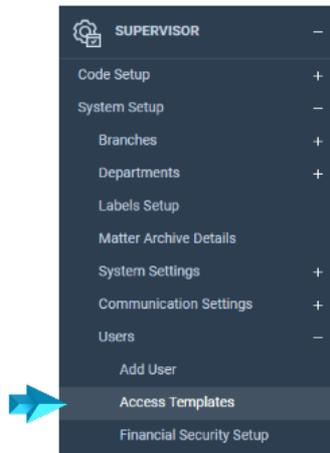
Supervisor > Report Setup > Report Type:

SUPERVISOR	DESCRIPTION
Code Setup	Contains Acco
System Setup	Contains Analy
Financial Setup	Contains repor
Case Management Setup	Contains Case
User Design	
Report Setup	Report Type
Tools & Utilities	
Financial Periods	Contains repor
CRM-AF1 Additional Rates	Contains repor
CRM Auto Posting Defaults	
Reprint CRM611 Spreadsheet	
Include Documents	
Portal Setup	

If you do not have access to either of these areas, please follow the steps below.

Go to the Supervisor area of Osprey and then select 'System Settings'. When the menu appears, click on 'Users' and then 'Access Templates'.

This will open a list of the areas of Osprey which can then be edited to allow access for users linked to a specific template.



Edit the 'Supervisor' template and scroll toward the bottom of the list of Supervisor check boxes. Ensure the areas displayed below are checked:



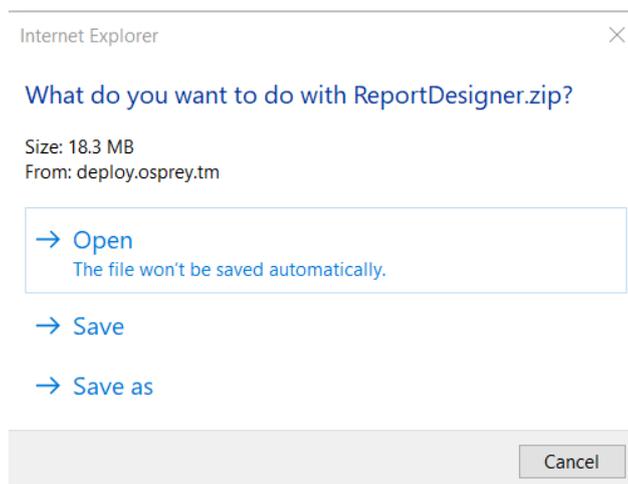
In order to allow users access to any saved reports, ensure that the following options are checked against any relevant access template under the Reports area.



- Ensure that you have installed the Report Designer software on the PC that you intend to perform the training session on, using the link below. This may require administrator rights, so we recommend that you discuss this with your IT team.**

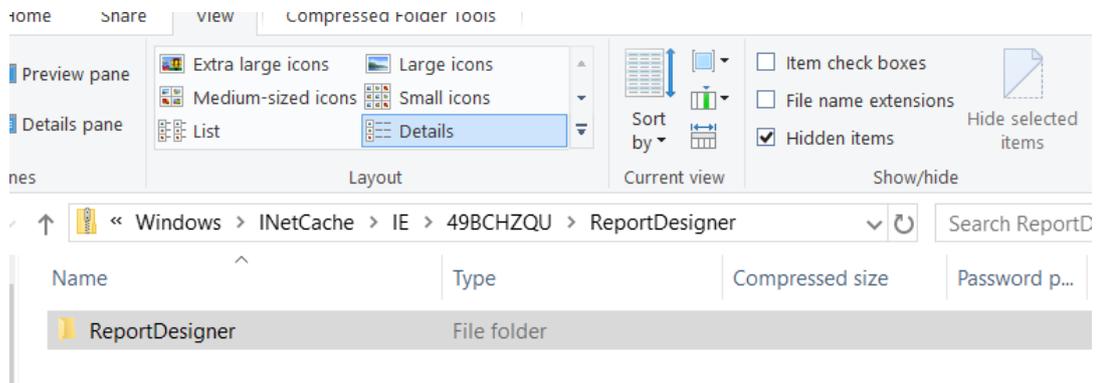
<http://deploy.osprey.tm/products/tools/ReportDesigner/ReportDesigner.zip>

Click the link above, and a box similar to the below will open:



Click Open.

A File Explorer box will open:



Double click the ReportDesigner folder, then double click the setup.exe file:

Name	Type	Compressed size
ReportDesignerInstaller	Windows Installer Package	18,5
setup	Application	2

Follow the instructions to install the Report Designer.

- Ensure that your Osprey User ID is linked to the Supervisor access template – only Supervisor users are permitted to log in to the report designer. This can be checked from Supervisor > System Setup > Users:**

Supervisor > System Setup > Users

Export Refresh Clear UI state

USER ID	TEMPLATE NAME
ALEXH	Supervisor
DAVE	Supervisor
ROBJ	Supervisor
Supervisor	Supervisor
SUPERVISOR2	Supervisor
SUPERVISOR3	Supervisor
USER	Case Worker