

What is the firm administrator's role?

Introduction

This topic looks at the role of the firm administrator. You will find out why each firm needs an administrator and what the administrator's responsibilities are. An administrator's responsibilities include, creating new users, amending existing user details and removing user access.

At the end of this module you will be able to:

- explain why a firm administrator is needed
- describe the administrator's role and responsibilities
- describe how to maintain a firm's user population

Note

For the purposes of this learning it is assumed that you are a nominated firm administrator.

Why do we need a firm administrator?



Each firm must have a nominated administrator – or more than one if, for example, the firm has more than one branch.

For security reasons it is best to keep the number of administrators within each firm to a minimum and we recommend at least one of your firm administrators should be a partner or solicitor.

The initial administrator's login cannot be created by your firm. We will create this and send you the user name and password.

What are my responsibilities as a firm administrator?

In general your responsibilities are to maintain your firm's user details.

Your first responsibility though is to learn how to use the Legal Aid Online system so you can carry out your specific responsibilities. These are to:

- (initially) create all your firm's users and any subsequent new users
- ensure all users have access to the relevant learning modules
- receive any updates or important messages regarding Legal Aid Online and circulate these to other users within your firm
- change user status (for example, from 'non-practitioner' to 'practitioner')
- change surnames and other names
- keep user email addresses up to date
- allocate practitioner access (who can create and view online cases for particular practitioners)
- reset passwords and remove users (for example when a user leaves your firm)

Protecting your firm's data



To help protect the security of your firm's data, for example when someone leaves, we highly recommend that your firm adheres to two particular recommendations.

Click on the headings below to find out what they are.

Passwords

Users should not share each other's passwords.

For extra security we recommend you reset **all** the passwords within the firm when someone leaves.

De-activation

When a user leaves the firm it is very important that they are de-activated as soon as possible as this prevents them from logging in and seeing your firm's data.

Although this prevents them from logging in, if they are a practitioner **you** will still be able to view and process their cases unless the case is transferred to another firm.

How do I manage my firm's online users?

If we have set you up as a firm administrator you will have access to the Firm Administrator tab on the Legal Aid Online home page.

To manage your users you must first access the administration screens by selecting the 'Administration' tab at the top of the screen.

Any users already created for your firm will be in the list of user names that displays to the left of the main administration screen, so always check this list first before you start managing any users.

The screenshot shows the 'Administration' tab selected in the top navigation bar. Below the navigation bar, there are tabs for 'Users' and 'Create User'. The main content area is titled 'USERS' and contains a search criteria input field and a 'Show Inactive Users' checkbox. Below this, there is a table of users with columns for Name, Practitioner Code, and various service categories (A&A, Civil, Criminal, Children, Remittances, Remittance notification). The 'Active' and 'Admin' columns show green checkmarks and red X's respectively. The user 'Matthew Auchincloss' is highlighted with a red box.

Name	Practitioner Code	A&A	Civil	Criminal	Children	Remittances	Remittance notification	Active	Admin
Matthew Auchincloss	377361	✓	✗	✓	✗	✗	✗	✓	✓
Cheryl Beattie	395115	✓	✗	✓	✗	✗	✗	✓	✗
Nicky Brown	393660	✓	✗	✓	✗	✗	✗	✓	✗
JAMES CLARKE	353294	✓	✗	✓	✗	✗	✗	✓	✗
Paul Cannavan		✓	✗	✓	✗	✗	✗	✓	✗
Sonia Cheema	328939	✓	✗	✓	✗	✗	✗	✓	✗
Hugh Duncan	373784	✓	✗	✓	✗	✗	✗	✓	✗

User edit functions

There are a number of functions you can use to edit user details.

In the user list, next to each of the user names, there are three icons to the left. They are:

- edit user
- practitioner allocation
- change password

Click on each of them below (highlighted by a green square) to find out what they do.

The screenshot displays the 'USERS' management page. At the top, there is a navigation bar with 'Users' and 'Create User' tabs. Below this is a search area with a 'Search Criteria' input field and a 'Show Inactive Users' checkbox. The main content area shows a table of users with the following columns: Name, Practitioner Code, A&A, Civil, Criminal, Children, Remittances, Remittance notification, Active, and Admin. The first user, Matthew Auchincloss, has three icons highlighted with green squares: a person icon, a person with a plus icon, and a person with a key icon. The table data is as follows:

Name	Practitioner Code	A&A	Civil	Criminal	Children	Remittances	Remittance notification	Active	Admin
Matthew Auchincloss	377361	✓	✗	✓	✗	✗	✗	✓	✓
Cheryl Beattie	395115	✓	✗	✓	✗	✗	✗	✓	✗
Nicky Brown	393660	✓	✗	✓	✗	✗	✗	✓	✗
JAMES CLARKE	353294	✓	✗	✓	✗	✗	✗	✓	✗
Paul Cannavan		✓	✗	✓	✗	✗	✗	✓	✗
Sonia Cheema	328939	✓	✗	✓	✗	✗	✗	✓	✗
Hugh Duncan	373784	✓	✗	✓	✗	✗	✗	✓	✗

We will look at each of these functions in more detail in later topics but next we are going to look at how to create new user.

How do I create a new user?

To begin the process you select the 'Create User' tab on the main administration screen and the 'Create User' screen is displayed. The system defaults to 'No' for the 'Existing user' option. However, if the user is already a user for another firm you will need to change this to 'Yes'. Select the green highlighted area for more information.

CREATE USER

Existing user Yes No Submit

Username

Title

Forename *

Surname *

Date of birth * (DD/MM/YYYY)

E-mail Address *

Verify E-mail Address *

Contact Telephone

Position * -- Please Select --

Active

Firm Administrator

A&A Access

Civil Access

Criminal Access

Children Access

Remittance Access

Submit



Entering user details

If the user you want to create is not already a user at another firm then select 'No' from the 'Existing user' options. The system will default 'Practitioner' to 'Yes' and prompt you to enter the practitioner code. Select the green highlighted Practitioner Code field for more information.

CREATE USER

The screenshot shows a 'CREATE USER' form with the following fields and options:

- Existing user:** Radio buttons for Yes and No. The 'No' option is selected.
- Practitioner:** Radio buttons for Yes and No. The 'Yes' option is selected.
- Practitioner Code:** A dropdown menu, highlighted with a green box.
- Title:** A dropdown menu.
- Forename:** A text input field with a red asterisk, highlighted with a green box.
- Surname:** A text input field with a red asterisk, highlighted with a green box.
- Date of birth:** A date input field with a calendar icon and '(DD/MM/YYYY)' format, highlighted with a green box.
- E-mail Address:** A text input field with a red asterisk, highlighted with a green box.
- Verify E-mail Address:** A text input field with a red asterisk, highlighted with a green box.
- Contact Telephone:** A text input field.
- Position:** A dropdown menu with '-- Please Select --' as the current selection.
- Active:** A checked checkbox.
- Firm Administrator:** An unchecked checkbox.
- A&A Access:** An unchecked checkbox.
- Civil Access:** An unchecked checkbox.
- Criminal Access:** An unchecked checkbox.
- Children Access:** An unchecked checkbox.
- Remittance Access:** An unchecked checkbox.

There are two 'Submit' buttons: one at the top right and one at the bottom right of the form area.

The field titles in red text are mandatory and must be completed. Select the green highlighted area to find out more.

There are a few more actions you need to take on this screen before you have finished creating the new user.

CREATE USER

Existing user Yes No **Submit**

Practitioner Yes No

Practitioner Code

Title

Forename *

Surname *

Date of birth * (DD/MM/YYYY)

E-mail Address *

Verify E-mail Address *

Contact Telephone

Position *

Active

Firm Administrator

A&A Access

Civil Access

Criminal Access

Children Access

Remittance Access

Submit

You should only select the Firm Administrator check box if you want to create another administrator for your firm.

Finally, you must select which online services the user will need access to.

When you are satisfied that all the entries you have made are correct then you can create the user by selecting the 'Submit' button.

Confirmation

If the details for the newly created user are valid, you will receive a message displaying their details, including the user name and password. The password is automatically generated by the system.

Confirmation

 **Success!**

User details successfully submitted to Scottish Legal Aid Board

Name: User Example
 User Name: EXAMPLEUS1
 Password: 5m1n4v4m

Date created: 23/04/2014

 [Print Details](#)

Your user can now access the system with the login details you have created. The user must enter the password exactly as it is displayed on the Confirmation screen, with the upper and lower case letters and numbers. The user will be prompted to change the password the first time they log in to the system.

The user details can be printed and given to the new user for reference.

At the beginning of this topic we looked briefly at the edit user, practitioner allocation and change password functions. For the remainder of this topic we are going to look at these in more detail as well as looking at how to remove a user's access to the system. We'll begin with how to edit a user's details.

Users
Create User

USERS

Search Criteria

Show Inactive Users

Results per page 10 1 2 3 4 Next > Results: 35

	Name	Practitioner Code	A&A	Civil	Criminal	Children	Remittances	Remittance notification	Active	Admin
  	Matthew Auchincloss	377361								
  	Cheryl Beattie	395115								
  	Nicky Brown	393660								

How do I edit user details?

To edit a user's details, from the main administration screen, select the edit user  icon next to the user you want to amend. This takes you to the Edit User screen.

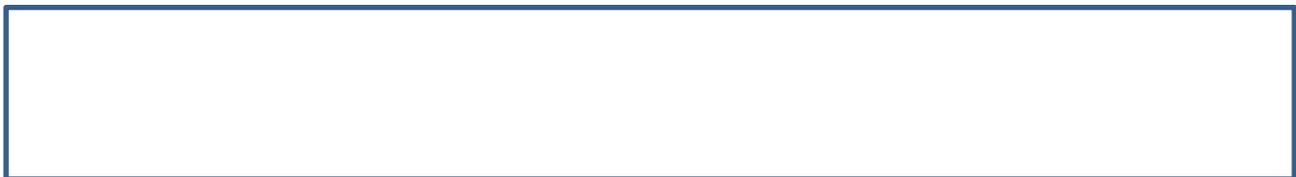
On this screen you can edit all the user details except for the user name.

When all the edits have been made, just select 'Submit'. Click on the green highlighted area for more information.

EDIT USER

USER: User Example

Username	EXAMPLEUS1	Return to Users	Submit
Practitioner			
Title	Mr		
Forename *	User		
Surname *	Example		
Date of birth *	01/01/1980  (DD/MM/YYYY)		
E-mail Address *	uexample@hotmail.com		
Verify E-mail Address *	uexample@hotmail.com		
Contact Telephone	0131-226-7061		
Position *	Other		
Active	<input checked="" type="checkbox"/>		
Firm Administrator	<input type="checkbox"/>		
A&A Access	<input type="checkbox"/>		
Civil Access	<input checked="" type="checkbox"/>		
Criminal Access	<input checked="" type="checkbox"/>		
Children Access	<input type="checkbox"/>		
Remittance Access	<input type="checkbox"/>		
		Return to Users	Submit



How do I manage a user's practitioner allocation?

To manage practitioner allocation for a user, select the practitioner allocator  icon from the main administration screen. A list of all practitioners linked to your firm will be displayed. All the firm's practitioners default to 'Allow access' as shown by the ticks in the check boxes.

PRACTITIONER ALLOCATION

USER: User Example

Select All Return to Users Submit

Results per page: 10 1 2 3 4 Next > Results: 36

Name	Practitioner Code	Allow access
MATTHEW AUCHINCLOSS	377361	<input checked="" type="checkbox"/>
CHERYL BEATTIE	395115	<input checked="" type="checkbox"/>
NICOLA BROWN	393660	<input checked="" type="checkbox"/>
JENNIFER CAMERON	392537	<input checked="" type="checkbox"/>
PAUL CANNAVAN	304926	<input checked="" type="checkbox"/>
SONIA CHEEMA	328939	<input checked="" type="checkbox"/>
JAMES T CLARKE	353294	<input checked="" type="checkbox"/>
KENNETH W CLOGGIE	370884	<input checked="" type="checkbox"/>
ELAINE V CRAWFORD	345321	<input checked="" type="checkbox"/>
FIONA DOURISH	387677	<input checked="" type="checkbox"/>

1 2 3 4 Next >

Return to Users Submit

A tick in the check box next to a practitioner's name means that the user will be able to create and access work for that practitioner.

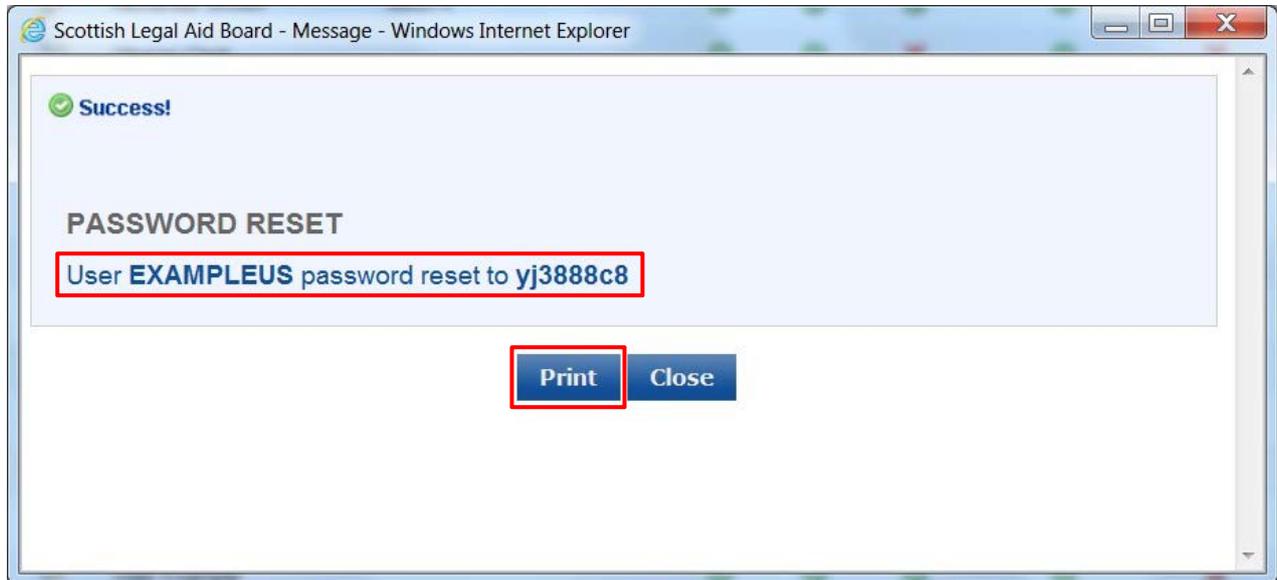
If the user needs access to work for all the firm's practitioners, you can leave the screen as it is. Otherwise, just deselect the practitioners that are not relevant by unchecking the check box.

Note

If you create a new practitioner for your firm you will have to edit the practitioner allocation of all the users who will need access to the new practitioner's work.

How do I change user passwords?

If a user has forgotten or lost their password select their change password  icon on the main administration screen.



When the password icon is selected the system automatically resets the password and displays the new password details. You can print these details to give to the user for reference.

The first time the user logs into the system after the password has been reset they will be prompted to change it.

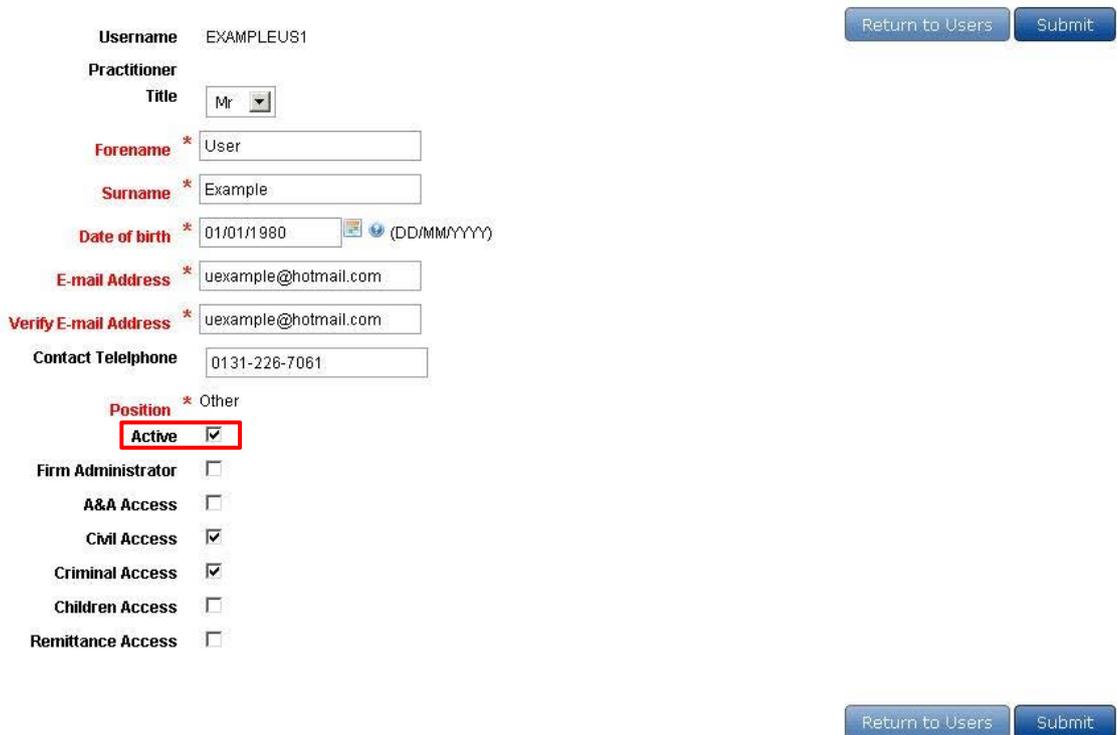
How do I remove a user's access?

It is important for your firm's security that you remove access of anyone leaving the firm from the system as soon as possible after their leaving date.

To do this, you'll need to find their entry in the users list on the main administration screen, and select the edit user  icon in the left hand column. As you will remember, this takes you to the 'Edit User' screen.

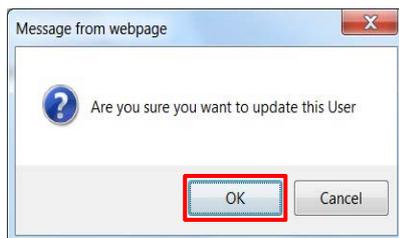
EDIT USER

USER: User Example



To remove user access for your firm you must uncheck the 'Active' check box.

The system will prompt you to confirm you are sure you want to edit this user by displaying this message:



When you click on 'OK' the system will confirm that the user has been successfully updated.

When you return to the administration screen you will see that user is not listed and they will no longer be able to sign on to your firm's system.

Select the green highlighted area for more information.

Users Create User

USERS

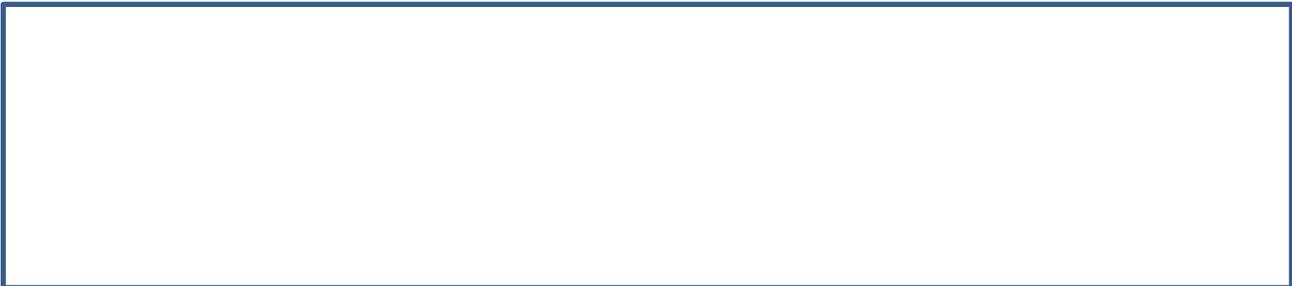
Search Criteria

Show Inactive Users

Results per page 10 < Prev 1 2 3 4 5 6 7 Next > Results: 62

	Name	Practitioner Code	A&A	Civil	Criminal	Children	Remittances	Remittance notification	Active	Admin
	Natalie Coverdale		✓	✗	✓	✗	✗	✗	✗	✗
	NERISSA DRENNAN	398538	✓	✗	✓	✗	✗	✗	✗	✗
	Fiona Dourish	387677	✓	✗	✓	✗	✗	✗	✗	✗
	Hugh Duncan	373784	✓	✗	✓	✗	✗	✗	✓	✗
	David Edgar	316220	✓	✗	✓	✗	✗	✗	✓	✗
	Ceri Evans		✓	✗	✓	✗	✗	✗	✓	✗
	Elizabeth Evans		✓	✗	✗	✗	✗	✗	✗	✗
	User Example		✗	✓	✓	✗	✗	✗	✗	✗
	Greg Farrell	385612	✓	✗	✓	✗	✗	✗	✗	✗
	Rebecca Forbes		✓	✗	✓	✗	✗	✗	✓	✗

< Prev 1 2 3 4 5 6 7 Next >



You have now completed this topic. You should return to the main menu if you wish to look at other topics.

What's next?

Now that you have completed this topic, you can:

- save it to an appropriate hard drive, network location or memory stick
- print it out, if you are connected to a printer that you can use