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 leaning 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.

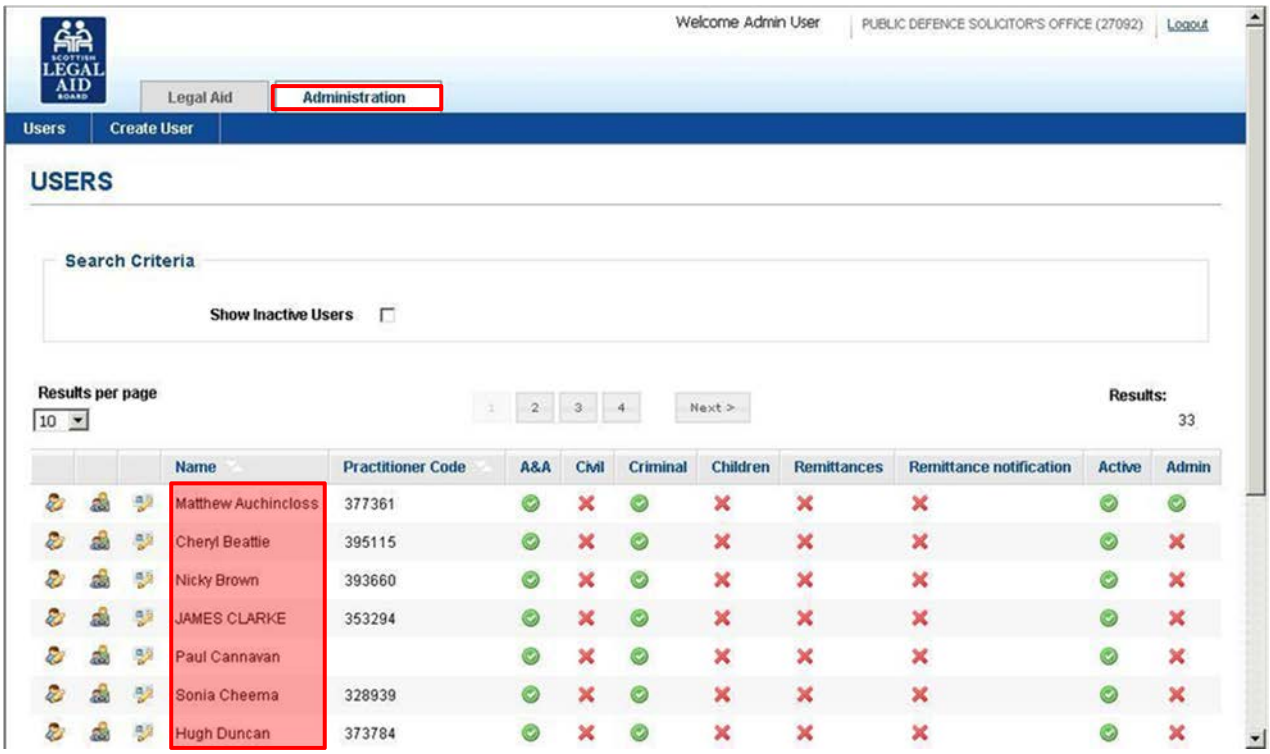
Although this prevents them from logging in, if they are a practitioner **you** will still be able to view and process their cases unless the case is transferred to another firm.

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.



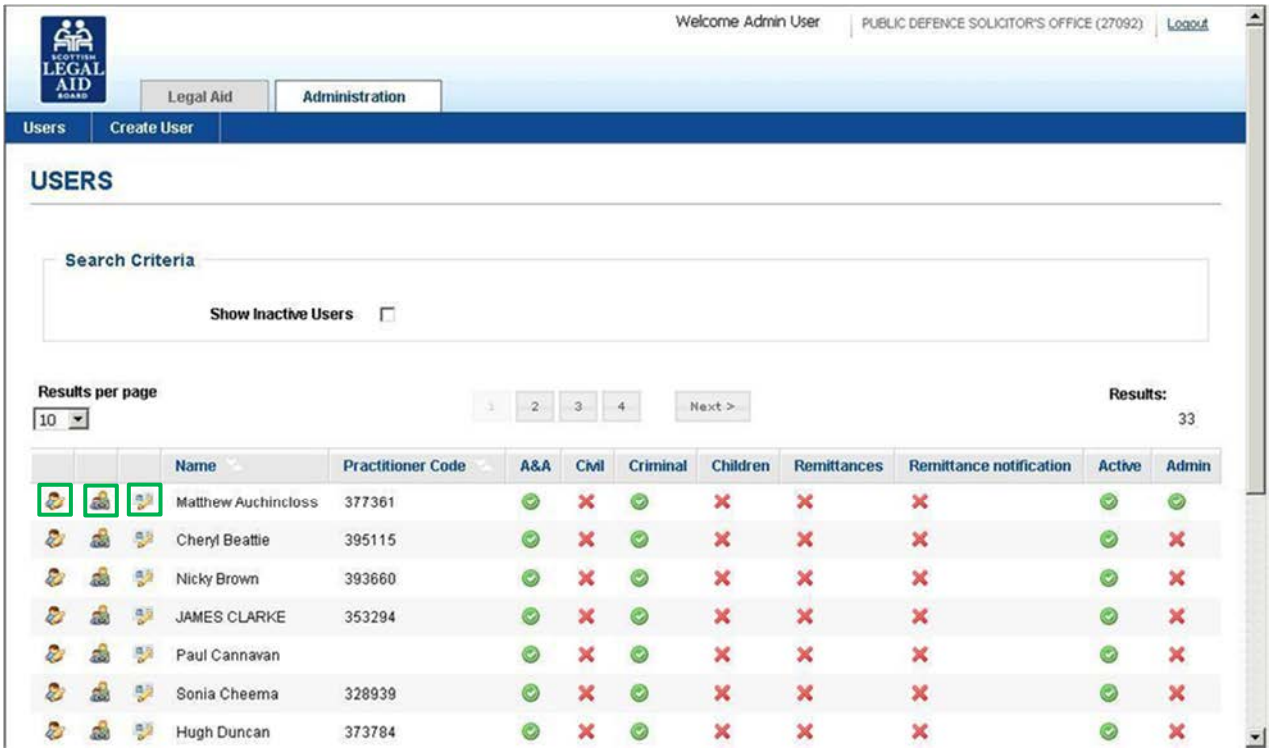
User edit functions

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

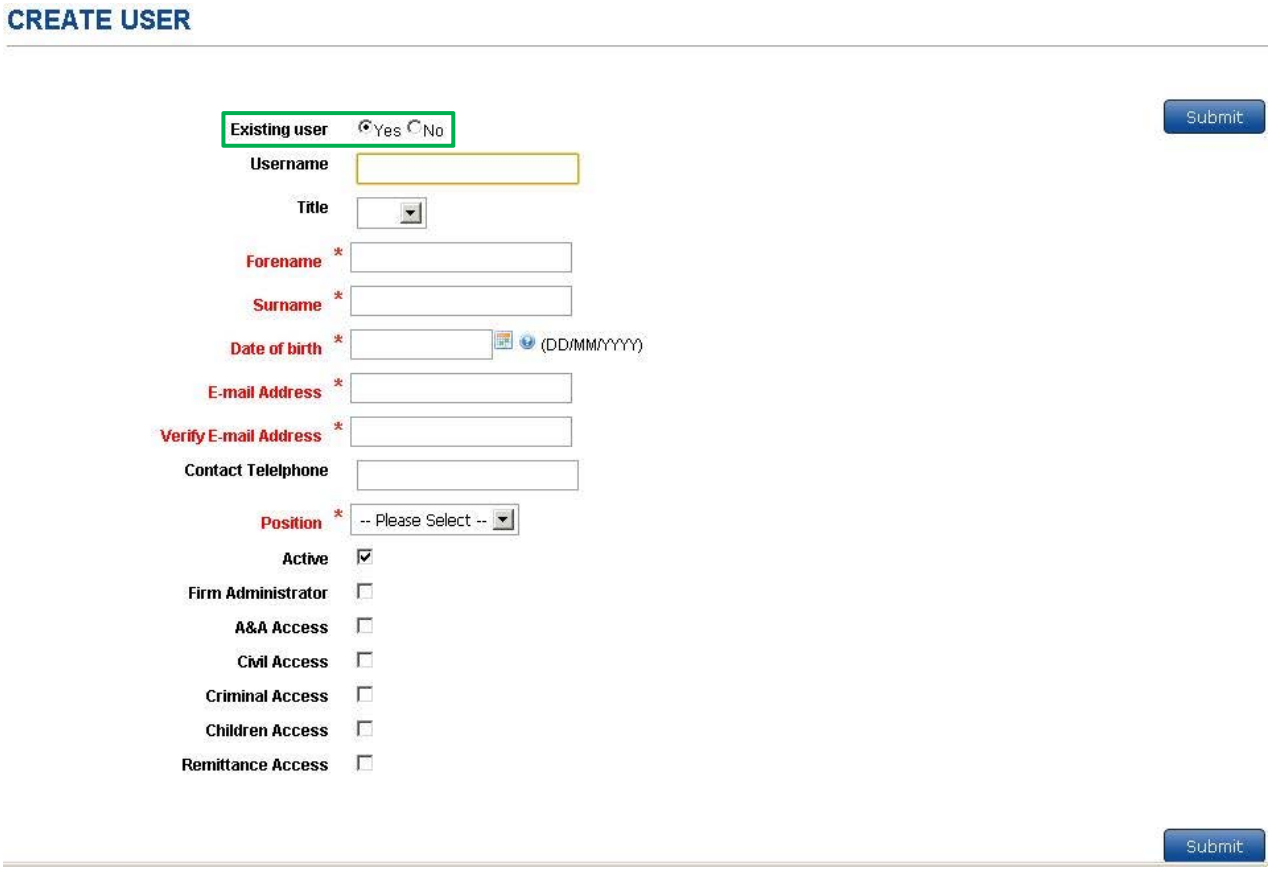
Click on each of them below (highlighted by a green square) to find out what they do.



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.

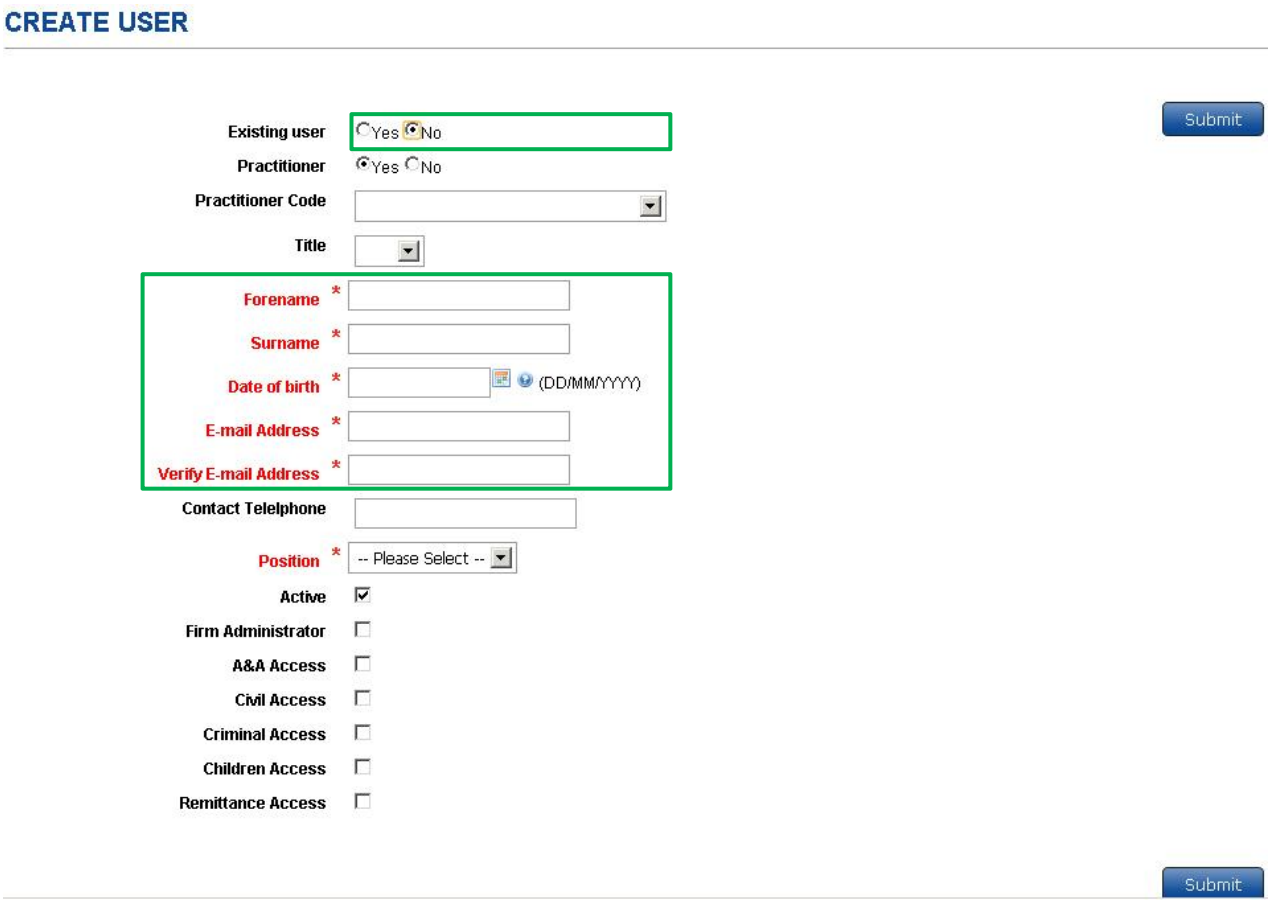
How do I create a new user?

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.



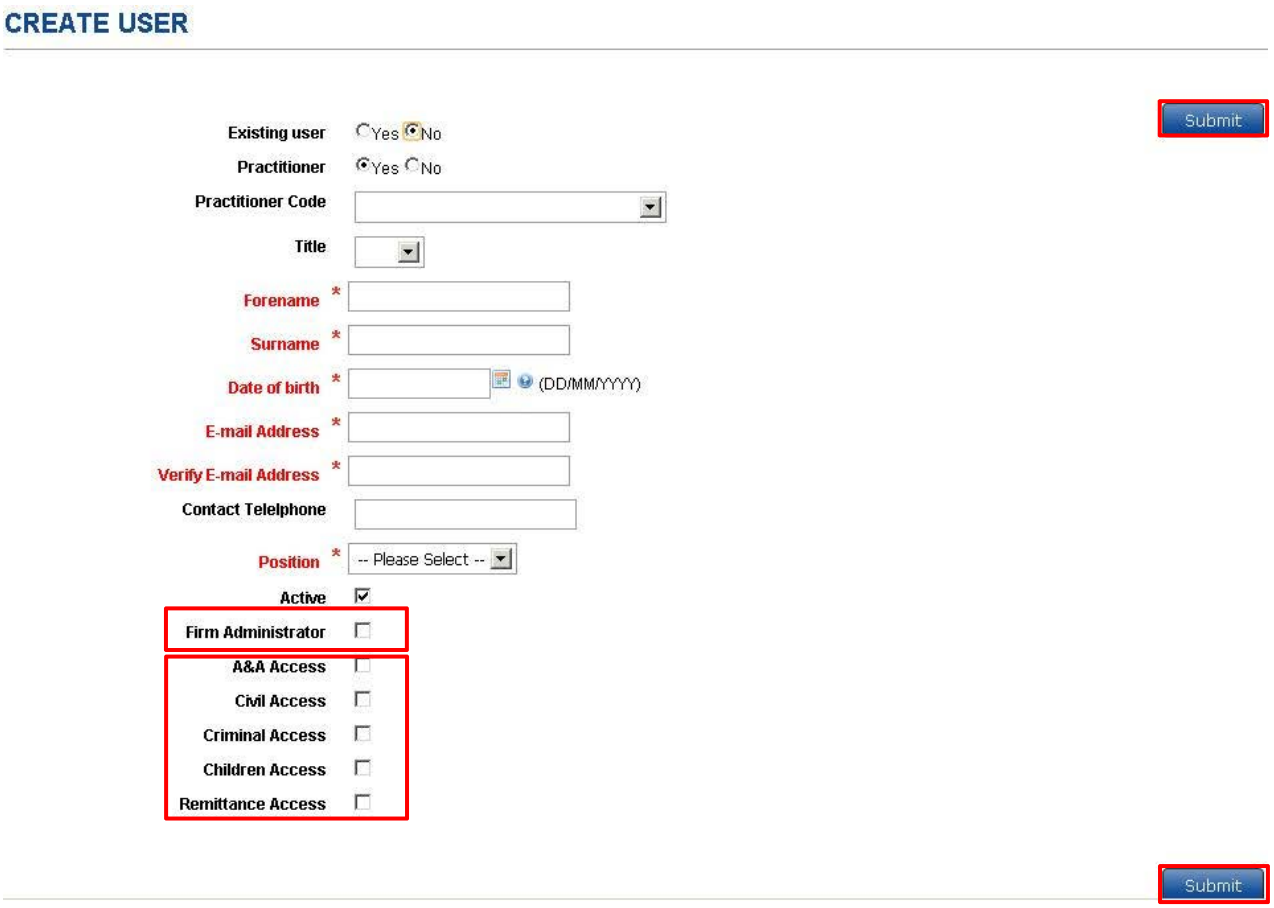
Entering user details

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.



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.



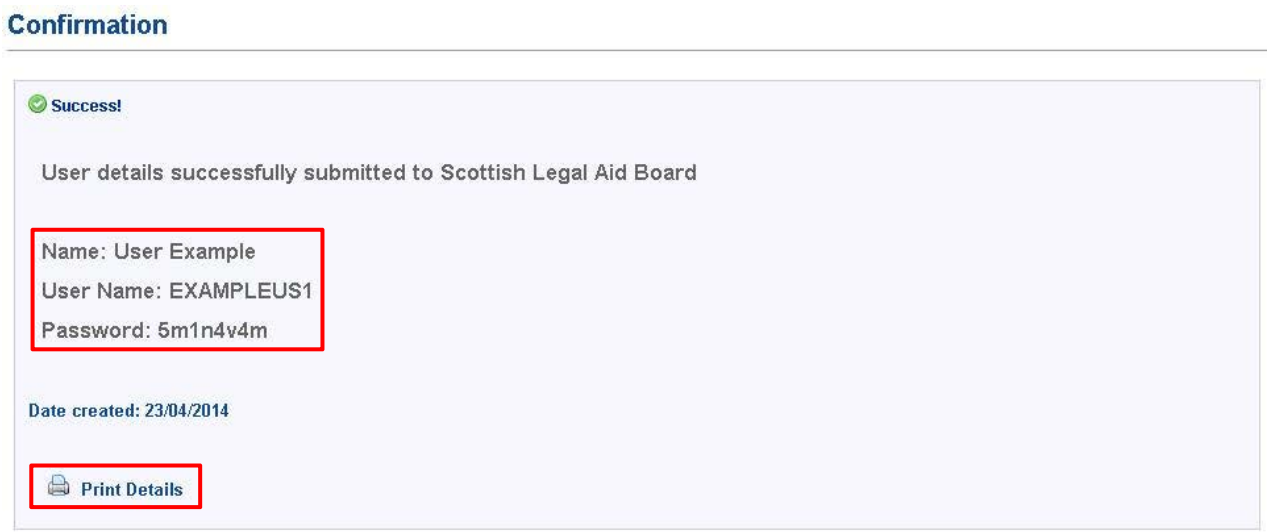
You should only select the Firm Administrator check box if you want to create another administrator for your firm.

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

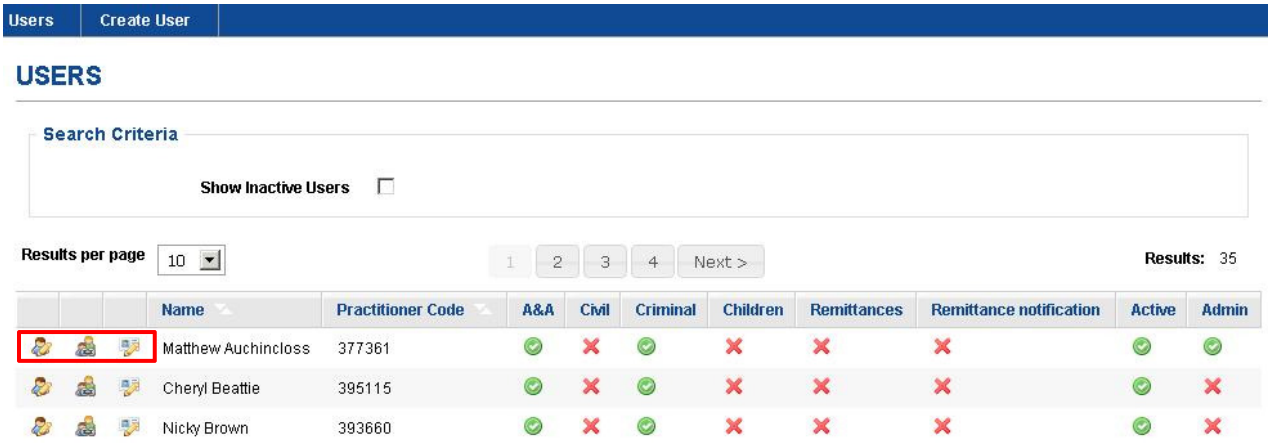
If the details for the newly created user are valid, you will receive a message displaying their details, including the user name and password**.** The password is automatically generated by the system.



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.

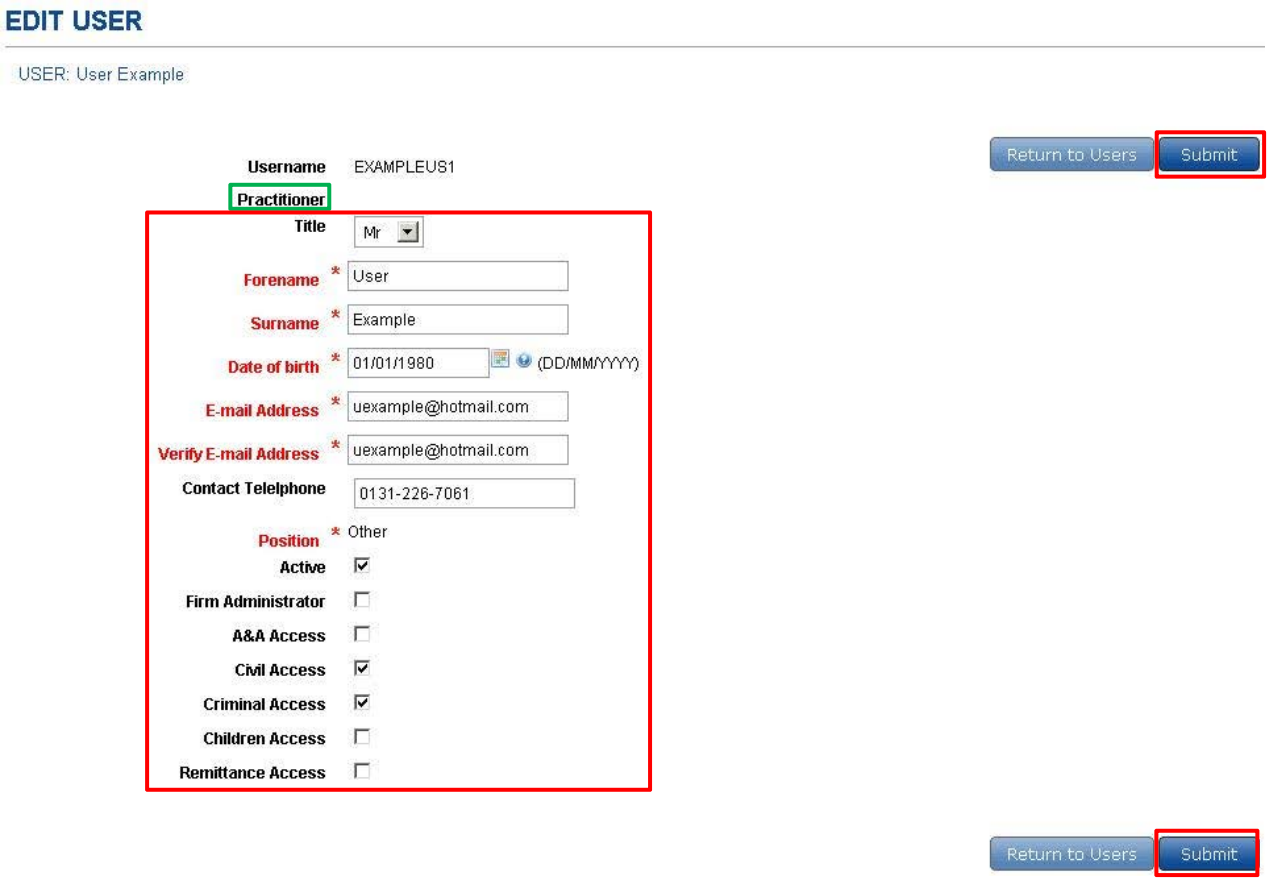


How do I edit user details?

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.

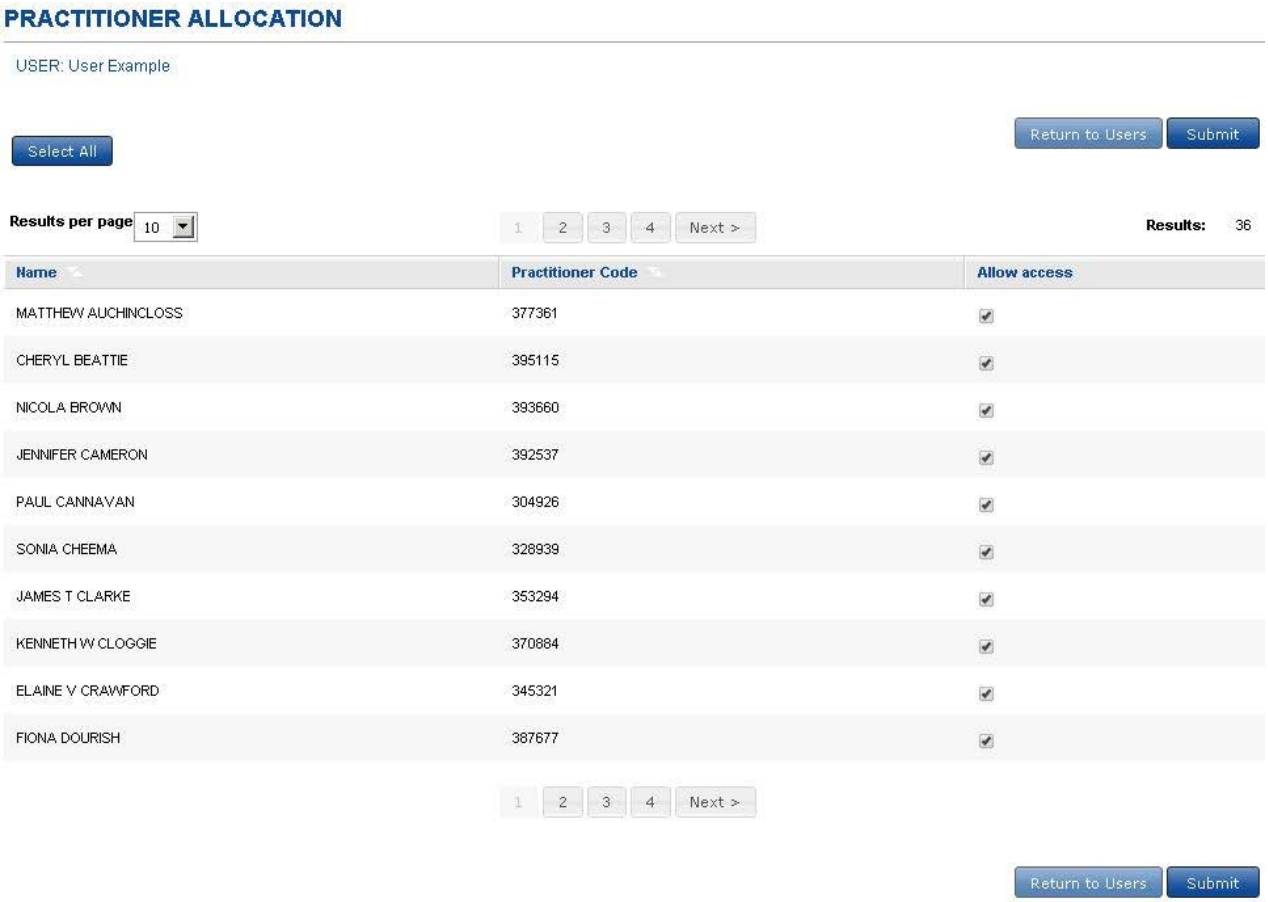
On this screen you can edit all the user details except for the user name.

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



How do I manage a user's practitioner allocation?

To manage practitioner allocation for a user, select the practitioner allocation 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.



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.

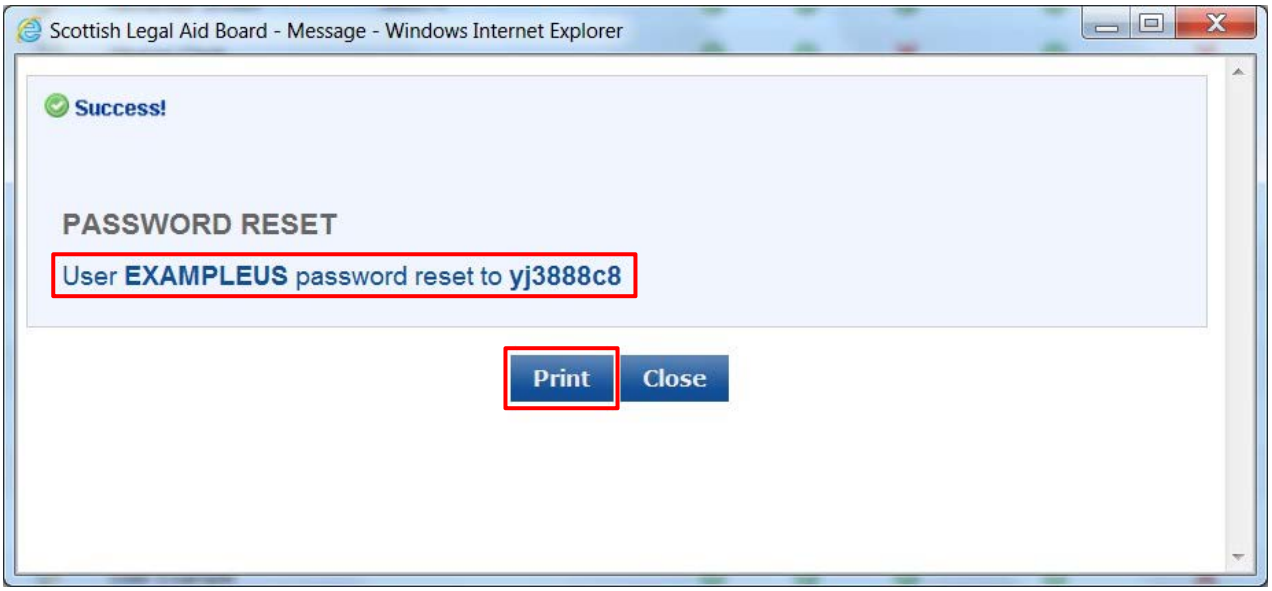
If the user needs access to work for all the firm's practitioners, you can leave the screen as it is. Otherwise, just deselect the practitioners that are not relevant by unchecking the check box.

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.



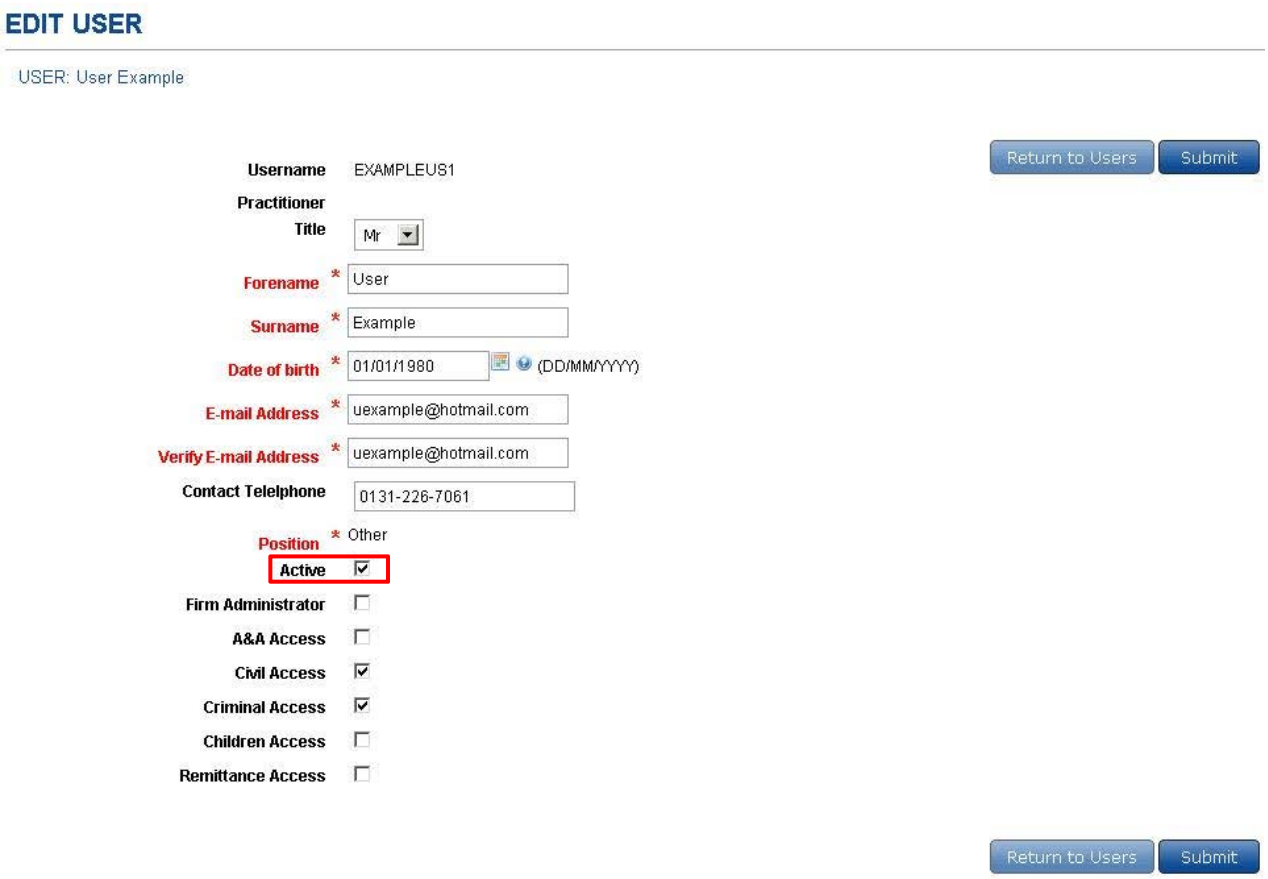
When the password icon is selected the system automatically resets the password and displays the new password details. You can print these details to give to the user for reference.

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?

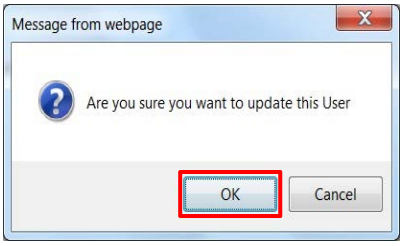
It is important for your firm's security that you remove access of anyone leaving the firm from the system as soon as possible after their leaving date.

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.



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

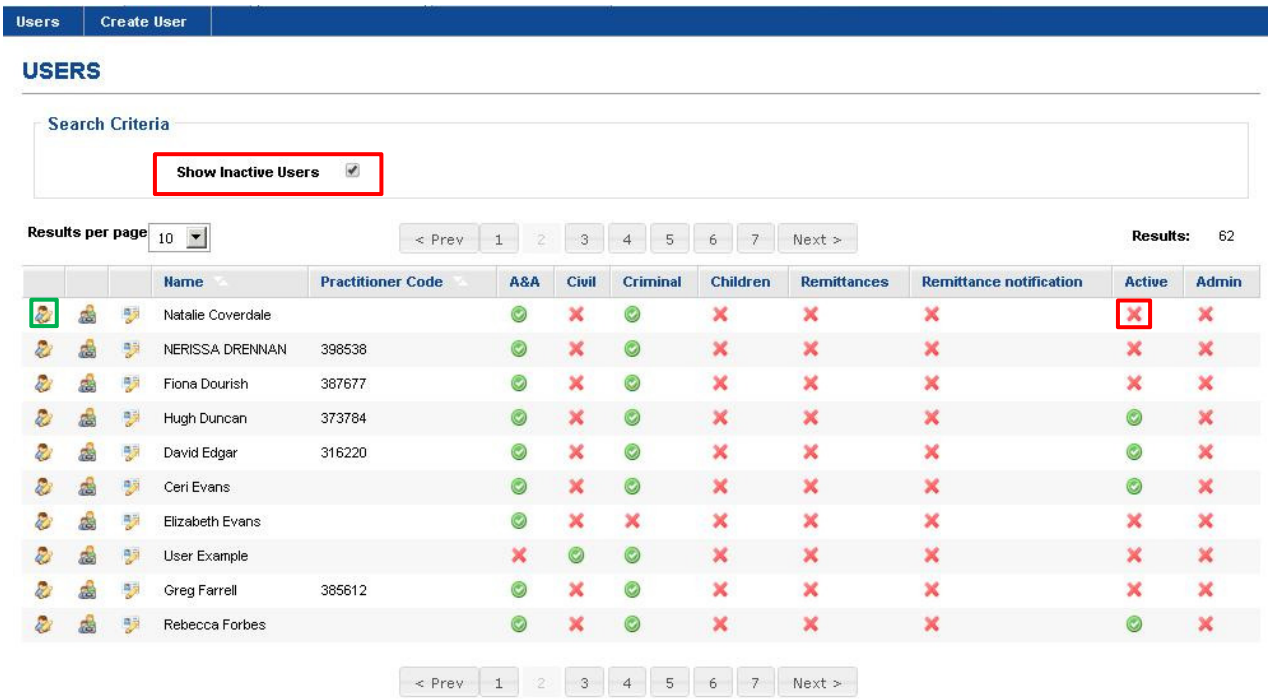
The system will prompt you to confirm you are sure you want to edit this user by displaying this message:



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.



If you need to re-activate a user select the 'Show Inactive Users' option on the main administration screen (this displays all users, including any users whose access has been removed).

Then use the edit function for the user and select the 'Active' checkbox on the Edit User screen. This will re-activate the user.

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

- save it to an appropriate hard drive, network location or memory stick

Print

- print it out, if you are connected to a printer that you can use