

# Introduction and Summary

Service Pack 30 introduces two new facilities for partners and managers to restrict access to files that possess sensitive information and the timesheets of other fee earners. The ability to restrict access to files for certain user groups has been requested by many users where it is in the interest of the firm, or solicitor conducting a case, to prevent any data being overseen

## Overview of Software Changes

### All Modules

1. Restricted Access to Files
2. View only your Timesheet
3. File Reference behaviour

### Crime Module

1. New Southern Area Magistrates' Court Codes.

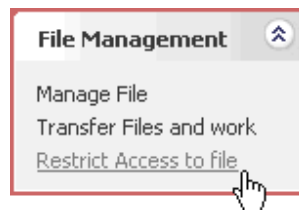
# All Modules

## 1. File Restrictions : Controlling access to files with sensitive data

Service Pack 30 sees the introduction of restricting file access to users and groups. Files that include sensitive material can be locked so that access is only given to certain members of staff.

The option to restrict access to files is situated in the *File Management* screen and you can also do this when cases are created.

In the *File Management* screen, select the file that is to have restricted access and then click on the *Restrict Access to file* link in the *File Management* menu.



You can select one or a combination of individual users and groups to have access to the file. This means that the users or groups who are not checked, will not be able to select the file reference in the dropdown of any screen in iLaw.

#### Note to iLaw Accounts users

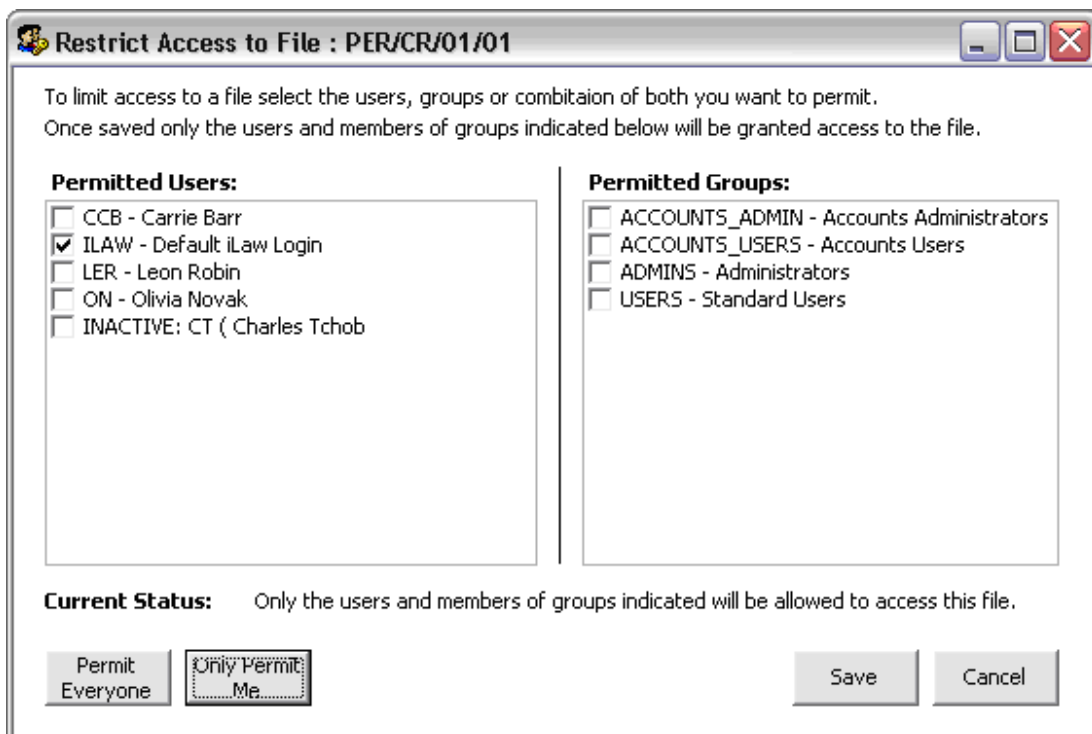
File Restrictions do not affect any permissions to see client information in account such as the *Client Ledger*.

#### 1. Restricting access to users

The simple way to restrict access to a file to other iLaw users is to determine this from the list in the area labelled **Permitted Users**. The list of users will default to being checked, which means they will all have access.

In the *File Management* screen choose the file reference selected which will have restrictions set. Click on the *Restrict Access to file* link.

The Restrict Access screen appears and you will see that the default position is every user and group selected. This means that they all currently have access to the file.



Step 1. Un-select the users that will not have access. If you are the only person to have access you can click on the *Only Permit Me* button.

Step 2. Unselect any groups in the *Permitted Groups* section.

Step 3. Click on *Save*.

Note that you can use the *Permit Everyone* button to reselect all Users and Groups.

**Restricting access to groups**

It is essential that if you want to implement file restrictions for groups that you also restrict access to the permissioning screens in *Staff management*.

Step 1. In *Setup-Staff Management-Group Management* enter a new group with the group name "FILE ACCESS" and the group description "File Access Group".

Step 2. In *Setup-Staff Management-Group Membership* select each user who is to have access to restricted files and add the "FILE ACCESS" group to *Members of*.

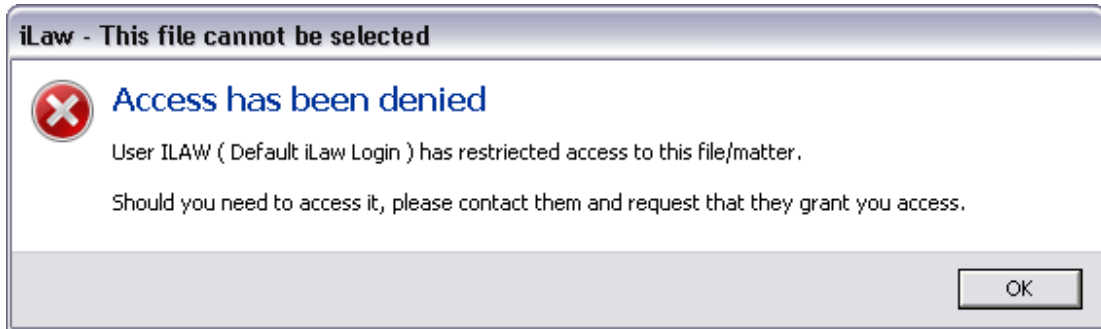
Step 3. In *Setup-Staff Management-Permissions by Group* select "FILE ACCESS" in the grid at the top of the screen. Then select *All* from the *Show screens only relevant to this Module*. Scroll down the list of screens for *File Management – Amend file restrictions*. Select *Full Access* from the options.

Remember that for restricted access to be set up for groups you would not want the permissions of other groups to include access to *Permissions/ Access Control*.

Step 4. Once this is done you can go to *File Management-Restrict Access to file* and include groups in the restricted access to the selected file.

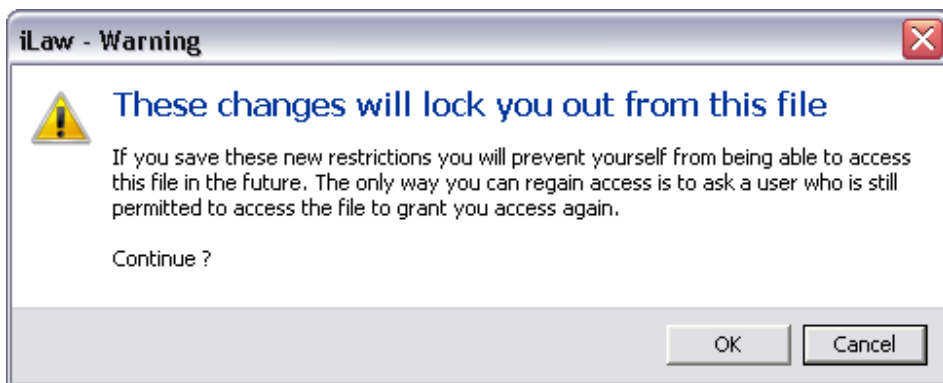
Users that do not have access to a file will be presented with an *Access has been denied* message. In screens such as Time Records, Document Processing or Billing, once the file is selected the message will appear stating non access and the file reference will be blank and the screen inert.

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#### Locking yourself from a file

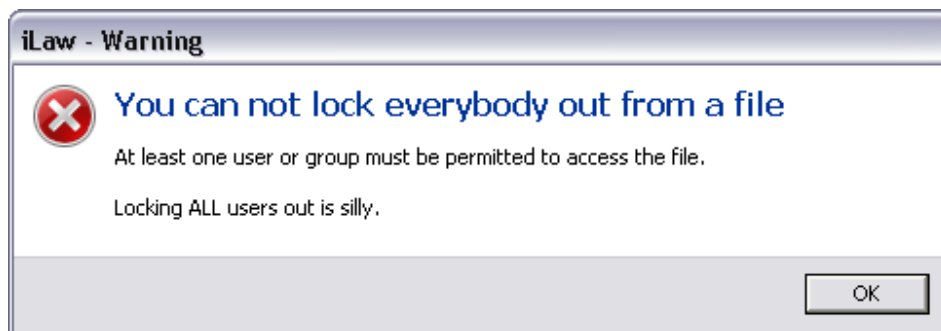
Another important thing to note is making sure that if your user login is not selected in the *Restrict access* screen when you click on *Save*, the following message will show.



It warns you that you will not be able to have access to this file in the future and that you would have to ask someone who has access to reset your permission. You may be the administrator making access limitations upon the request of a fee earner or partner in which you can click on OK.

If this is not the case then think about what you are doing. It's like you are about to shut the front door to your home but your keys are still sitting on the hall table and only one or two members of your family have keys to get back in!

iLaw will not allow you to lock everyone out of a file. Should you try to do this you will see this message.



### Setting Permissions on Case Creation

Permissions for a new matter can be set when the file reference is created in the *Client Details* screen. In the *Create New File* window click on the *Permissions* button to open the *Restrict Access to* window. When the *Restrict Access to* window shows you can restrict users or groups as discussed in the two examples.

Your user profile will need to have full access to *Permissioning/ Access Control* in the *Staff Management* screens, *Permissions by group* or *Permissions by Screen*. If your user profile is set to Read only or Access Denied the Permissions button will not show.



## 2. Timesheets : Restricted Access to other Fee Earners Timesheets

From Service Pack 30, the *Timesheets* screen will only show time records entered for the log-in user and no one else.

For managers and staff who want access to all fee earner timesheets follow these steps.

Step 1. In *Setup-Staff Management-Group Management* enter a new group with the group name "TIMESHEET ACCESS" and the group description "Timesheet Access Group".

Step 2. In *Setup-Staff Management-Group Membership* select each user who is to have access to viewing all fee earner timesheets and add the "TIMESHEET ACCESS" group to *Members of*.

Step 3. In *Setup-Staff Management-Permissions by Group* select "TIMESHEET ACCESS" in the grid at the top of the screen. Then select *All* from the *Show screens only relevant to this Module*. Scroll down the list of screens for *Timesheets – View other users Timesheets*. Select *Full Access* from the three column options in the grid.

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Remember that for restricted access to be set up for groups you would not want the permissions of other groups to include access to *Permissions/ Access Control*.

### 3. File Reference Behaviour

The behaviour of the file reference dropdown has been changed. The file reference you have selected in whichever screen you are in will be the selected file reference when the dropdown is expanded.

When the dropdown is opened, the file reference currently selected will be

## Crime Module

### 1. Magistrates' Court Code changes

We have had notification of the correct Magistrates' Court codes to be used for courts in the Kent, Surrey and Sussex regions.

Please inform us if you are notified by your LSC area office about any changes to the Magistrates' Court codes used.