

Creating User Group Access to Matters (Setting up Information Barriers)

If you would like to restrict Matter access to certain user(s) in your firm do the following:

Step-by-step guide

A. Create New Security Class:

1. Go to Parameters > Set Parameters
2. Expand Miscellaneous > Double Click Firm Security Classes
3. Right Click anywhere on the grid and select 'Add' from the context menu:

Par_ID	Par_Type	Par_Code	Par_Descript	Par_Acct1	Par_Num1	Par_Num2	Par_Flag	Par_Date	Par_Num3	par_details_1	par_details_2	par_details_3	par_details_4	par_details_7	par_act_date	par_act_user	Par_parent	par_visible	par_inv_p	act_user_nm
676116	SE	S	Owner		0.0000	0			0.0000	Only the O...	Owner				3/0/2019	PRGADM		Y		N
676117	SE	A	Default		0.0000	0			0.0000	Default Sec...	Default				3/0/2019	PRGADM		Y		N
676123	SE	AA	AA Test		0.0000	0			0.0000	This is a test	Testing for ...				8/0/2019	PRGADM		Y		N
676124	SE	AB	AB Test /...		0.0000	0			0.0000	This is a te...	Testing for ...				8/0/2019	PRGADM		Y		N
676125	SE	AC			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676126	SE	AD			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676127	SE	AE			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676128	SE	AF			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676129	SE	AG			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676130	SE	SA			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676131	SE	BB			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676132	SE	BC			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676133	SE	BD			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676134	SE	BE			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676135	SE	BF			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676136	SE	BG			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
700688	SE	C1	Brief descr...		0.0000	0			0.0000	Summary of ...	Detailed de...				2/10/2019	ALP		Y		N
676137	SE	CA			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676138	SE	CB			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676139	SE	CC			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676140	SE	CD			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676141	SE	CE			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676142	SE	CF			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676143	SE	CG			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676118	SE	D			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676119	SE	P			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676120	SE	R			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
676121	SE	S			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
681639	SE	XX	Test 1.9		0.0000	0			0.0000	Test	test				9/0/2019	PRGADM		N		N
676122	SE	Z			0.0000	0			0.0000						3/0/2019	PRGADM		Y		N
681069	SE	ZB	Used		0.0000	0			0.0000						8/0/2019	PRGADM		Y		N

4. In the window that opens, add a new Firm Security Class: for example 'S' and fill out the Description, Summary and Full Details fields as needed:

Add Parameter: SE - Firm Security Classes

Security Class: S

Description: Restricted Matters

Summary: Restricted Matters

Full Details: ad Matters for the following users - ADF, JDR

Visible:

OK Cancel Apply

5. Go to File > Reset Login Settings.

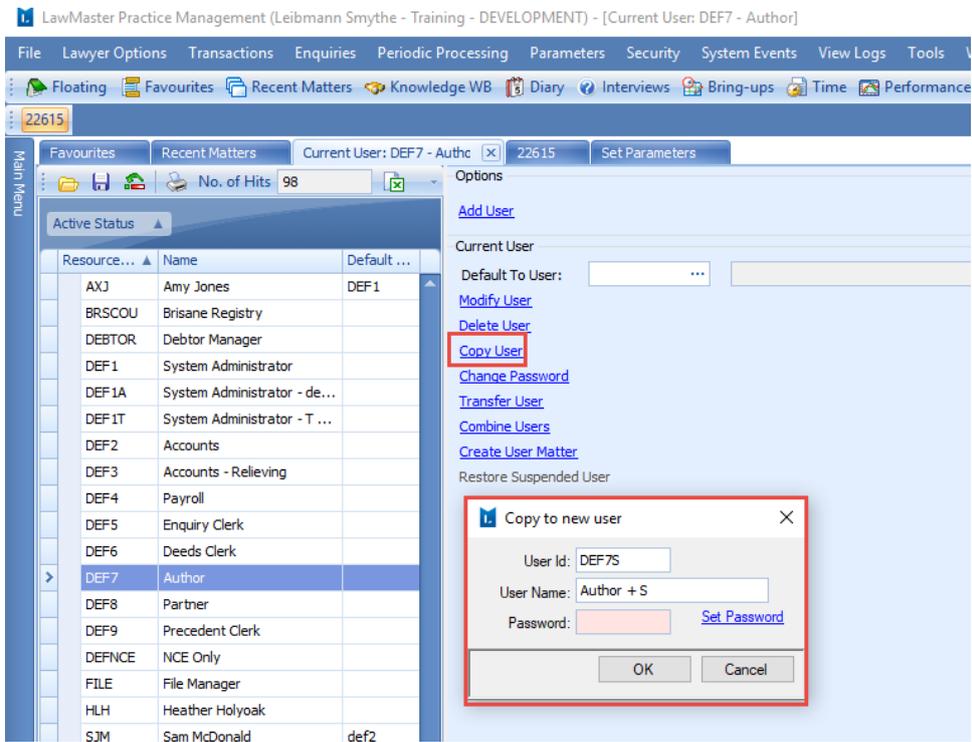
B. Create New Default User by Copying existing:

1. Go to Security > Maintain User Security

- Highlight the user logins that are to be granted access to the files and Identify which 'Default To User' field e.g. DEF7 is assigned to in the Active Status: ACTIVE expansion

Resource ...	Name	Default T...
Active Status: ACTIVE (Count=80)		
_BBR	Brisbane Boardroom	
ACC	Anthony Coomb	def2
ADOWNEY		DEF1
AMD	Andrew Downey	PROADM
AMD2	Andrew D Test	proadm
AMD3	Andrew D Test 3	DEF1
AMD4		
AMDNEW		DEF1
ANDAPI	Anderssen Lawyers Servic...	
ARG	Arun Govind	PROADM
ATB	Adam Baldwin	PROADM
ATC	Angela Copaine	def1
ATD	Anthony Drysdale	atb
ATE	Amy Ecclesworth	def1
ATF	Aerial French	DEF7
AXJ	Amy Jones	def5
AXP	Arpita Pillai	DEF9
BT	Bernard Timms	
BW	Bailey William	DEFT
CANON	Canon Service Account	
CCM	Celia McIness	deft
CJM	Celeste Magson	proadm
CNCTWKS	Connectworks (NZ)	
CR	Cameron Russell	proadm
CWA2	CWA2	
CWAS	CWA Service Account	
DEF7	Author	
DXF	David Fungalei	
EJS	Emily Short	proadm
FTP	Frank Petersen	
GLAPI	Gouldson Legal Service Ac...	
GLS	George Smythe	deft
HA	Harwood Andrews Service...	
HTB	Hans Biendorf	
IB	Ibis Brown	DEFT
IB2	Ian Brown	DEFT
JDR	Jason Ratajczek	Def1

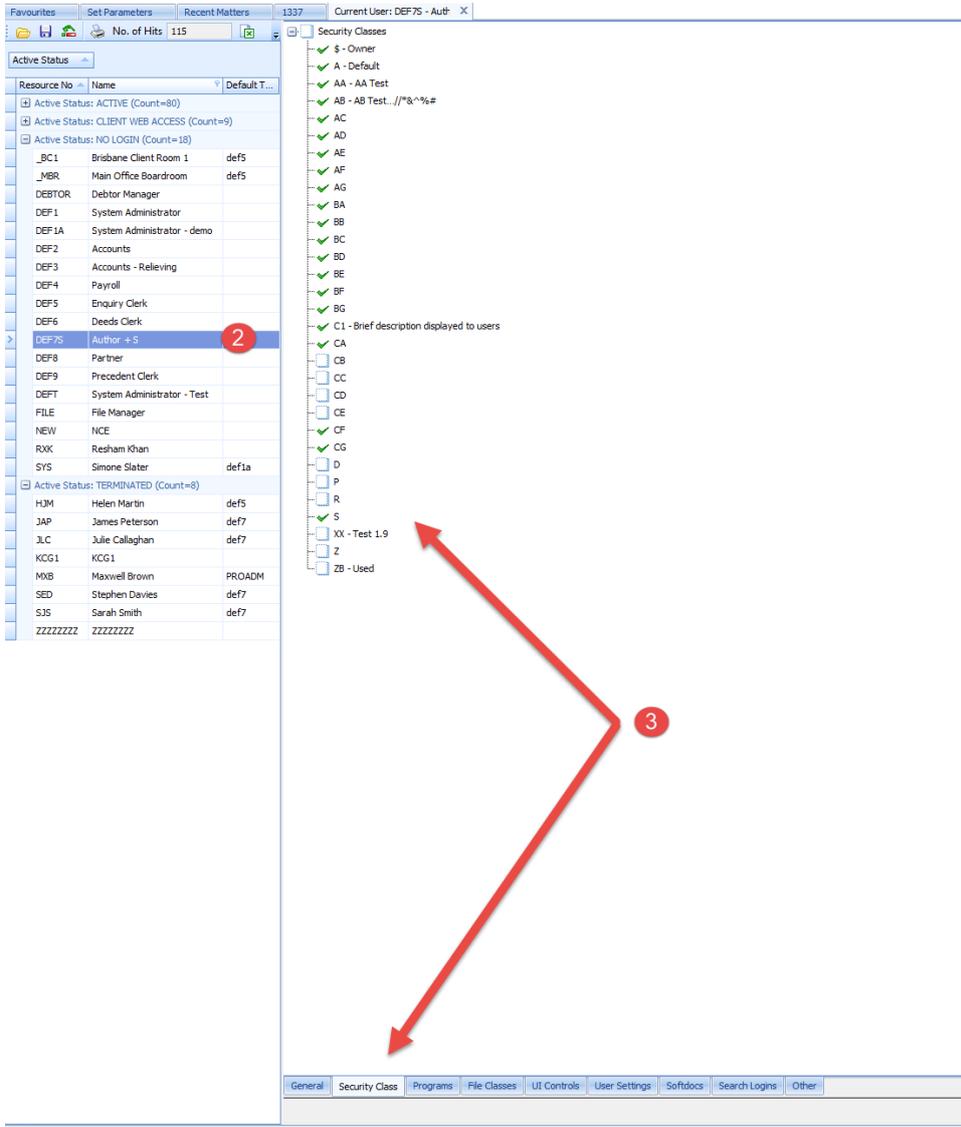
- Scroll down to Active Status: NO LOGIN expansion > Highlight the user Id e.g. DEF7
- Click Copy User
- In the Copy to new user window, complete the fields for "User Id:" (for example DEF7S) and "User Name:" (for example Lawyer + S). Click Set Password > Create the "New Password:", and "Confirm Password:" > Click OK > Click OK:



Note: When selecting multiple users in Step 2, if they have different DEF IDs then this process will need to be repeated for each DEF ID, eg DEF7S, DEF5S, DEF1S...

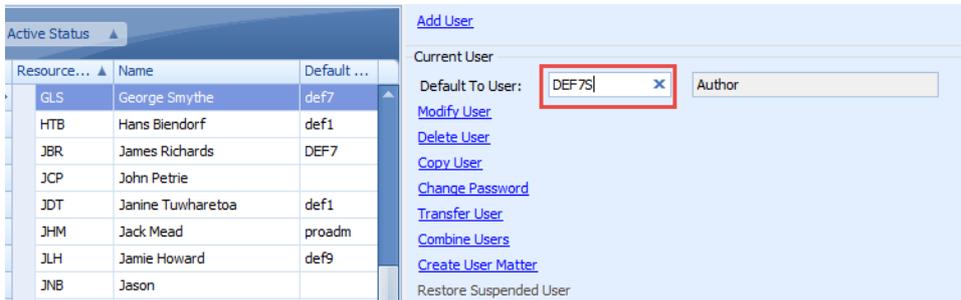
C. Go to each of the New 'Default To User(s)' and enable the New Security Class:

1. Go to Security > Maintain User Security
2. Scroll down to the new user you have just created in Active Status: NO LOGIN section, e.g. DEF7S
3. Go to the Security Class tab > Tick the Firm Security Class you created e.g. S > Click OK



D. Assign the new Default ID(s) to any users that need access to the files with the new security class:

1. Scroll to Active Status and one by one select the users that need access > Change Default To User: to the new Default that you have created e.g. DEF7S > Click OK
2. Go to File > Reset Login Settings



Assign the Matter to the New Security Class:

1. In the Matter you wish to apply the new unique File Security to, go to the Matter Details Screen > Review matter details - modify the 'File Security' field to 'S', and Click OK.

The screenshot shows the 'Update Matter Details' window with the following fields and values:

- Matter No: 22615
- Client ID: TH001750M
- Description: Management of Hammond Family Trust
- Dates - Opened: 20/12/2018
- Work Unit: A
- Contact ID: [Empty]
- Lawyer: KLH (Karen Hansen)
- Paralegal: ALK (Amy King)
- Billing Entity: [Empty]
- Billing Frequency: Not Defined
- Scale: 1
- Charge Type: Time based fees
- Remarks: [Empty]
- Referred By: Campaign (YP)
- Other Party Ref: [Empty]
- Estimates: Fees: \$25,000.00, Disbursements: \$0.00, Quantum: \$0.00
- Limits Disb: \$0.00, Limits Fees: \$0.00, Funding - Upfront: \$0.00
- Security: \$0.00
- Client Web Access: [Unchecked]

The matter and all folios within this matter will be assigned with this File Security class and will only be visible to the Users that have a 'Default To User' which has the selected File Security Class enabled.

NOTE: The changes will only be applied upon the next login for any users that are currently logged into LawMaster when this process has been performed.

E. You can also use this method to assign security classes to individual folios without needing to restrict a whole matter, by right clicking on the folio and selecting 'Modify' from the context menu. then changing the security class as per the screenshots below:

Folio No: Yellow=Outwards; Green=Inwards; White=Internal; Date: Grey=Archived; Pink=Checked Out (Issue Folio);

All Info Types Blank (info type) Accounts Emails Access Info

Drag a column header here to group by that column

I	Folio No	Storage ID	Information Type	Date of Writing	Author	Attachment Chec	Precis	To/From	Register Type
	26901	35823		01/12/2021	JDR			Mr C Russell	O-Outwards
	27143	36032	E	11/08/2021	JDR			Jason Ratajczek	O-Outwards
	27142	36031	E	11/08/2021	JDR			Jason Ratajczek	O-Outwards
	27141	36030		09/08/2021	JDR			Mr C Russell	O-Outwards
	27140	36029		03/08/2021	JDR			JDR	I-Inwards
	27139	36028		03/08/2021	JDR			JDR	I-Inwards
	27138	36027		03/08/2021	JDR			JDR	I-Inwards
	27137	36026		03/08/2021	JDR			JDR	I-Inwards
	27136	36025		03/08/2021	JDR			JDR	I-Inwards
	27135	36024		03/08/2021	JDR			JDR	I-Inwards
	27134	36023		03/08/2021	JDR			JDR	I-Inwards
	27133	36022		03/08/2021	JDR			JDR	I-Inwards
	27132	36021		03/08/2021	JDR			JDR	I-Inwards
	27131	36020		03/08/2021	JDR			JDR	I-Inwards
	27101	36000		10/06/2021	JDR			Mr C Russell	O-Outwards
	27100	35999		10/06/2021	JDR			Mr C Russell	O-Outwards
	27099	35998		10/06/2021	JDR			Mr C Russell	O-Outwards
	27098	35997		10/06/2021	JDR			Mr C Russell	O-Outwards
	27097	35996		10/06/2021	JDR			Mr C Russell	O-Outwards
	27095	35994		10/06/2021	JDR			Mr C Russell	O-Outwards
	27094	35993		10/06/2021	JDR			Mr C Russell	O-Outwards
	27085	35984		10/06/2021	PROADM			Mr C Russell	O-Outwards
	27063	35963	A	02/06/2021	JDR			Mr C Russell	O-Outwards
	27062	35962	A	02/06/2021	JDR			Mr C Russell	O-Outwards
	27061	35961	A	02/06/2021	JDR			Mr C Russell	O-Outwards
	27060	35960		28/05/2021	JDR			JDR	I-Inwards
	27059	35959		28/05/2021	JDR			JDR	I-Inwards
	27058	35958		24/05/2021	JDR			Jason Ratajczek	I-Inwards
	27002	0		24/03/2021	JDR				X-Internal
	27001	0	E	24/03/2021	JDR				X-Internal
	26999	0	E	18/03/2021	JDR				X-Internal
	26998	0	E	18/03/2021	JDR				X-Internal
	26997	0	E	18/03/2021	JDR				X-Internal
	26996	0	E	18/03/2021	JDR				X-Internal
	26995	0		18/03/2021	JDR				X-Internal
	26994	0		18/03/2021	JDR				X-Internal
	26988	35903		11/03/2021	JDR			Mr C Russell	O-Outwards
	26907	35829		28/10/2020	JDR			(Alias) 28/10/2020...	O-Outwards
	26906	35828	E	28/10/2020	JDR	✓	KLF	Jason Ratajczek	I-Inwards
	26903	35825		27/10/2020	JDR			Mr C Russell	O-Outwards

- Add Ctrl+A
- Modify Ctrl+M
- Delete Ctrl+D
- View Audit Trail
- Open Folio Viewer (Read Only) Ctrl+O
- Open Attachment (Read Only)
- Edit Attachment Ctrl+E
- Modify Attachment Name
- New Version
- Convert to PDF
- Modify Information Type
- Search
- Send Folio(s)
- SignIT
- New Email Ctrl+N
- Reply Ctrl+R
- Reply All Ctrl+Shift+R
- Forward Ctrl+F
- Forward as Attachment Ctrl+Alt+F
- Refer To
- Cancel Referral
- Finalise
- Cancel Finalise
- Bring-ups
- Cabinets
- Export / Print
- File Request
- Split Folio(s)
- Transfer Folio(s)
- Check Out
- View
- Compare Folios
- Select All Ctrl+Shift+A
- Unselect All Ctrl+Shift+U
- Summary

Modify Folio

Folio No: 26901

File No: Matter 1337 ... Matter Re

Date of Writing: 01/12/2021 Ref No: File Part No:

Date Sent/Received: 27/10/2020 Location:

Author: JDR ... Jason Ratajczek

Event:

To/From: Mr C Russell

Precis: DRAFT - MBG Precis JDR:C:1337 * DRAFT *

Document Template: BILL ... Matter bill

Register Type: O - Outwards

Information Type:

Retention Date: Retention Status: U ... Unknown

Archive Directory:

Security Class: S ...

Ver: 26901v01 Folio Based On: Original Folio?

Discoverable? Important? Privileged?

Disclosed? On

Destroyed? On By:

Client Web Access?

Last Updated: 1/12/2021 10:43:37 AM By: JDR

Details Attachments

OK Cancel Apply



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