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:

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:**

5. Go to File > Reset Login Settings.

B. Create New Default User by Copying existing:

1. Go to Security > Maintain User Security

2. 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

3. Scroll down to Active Status: NO LOGIN expansion > Highlight the user Id e.g. DEF7
4. Click Copy User
5. 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:
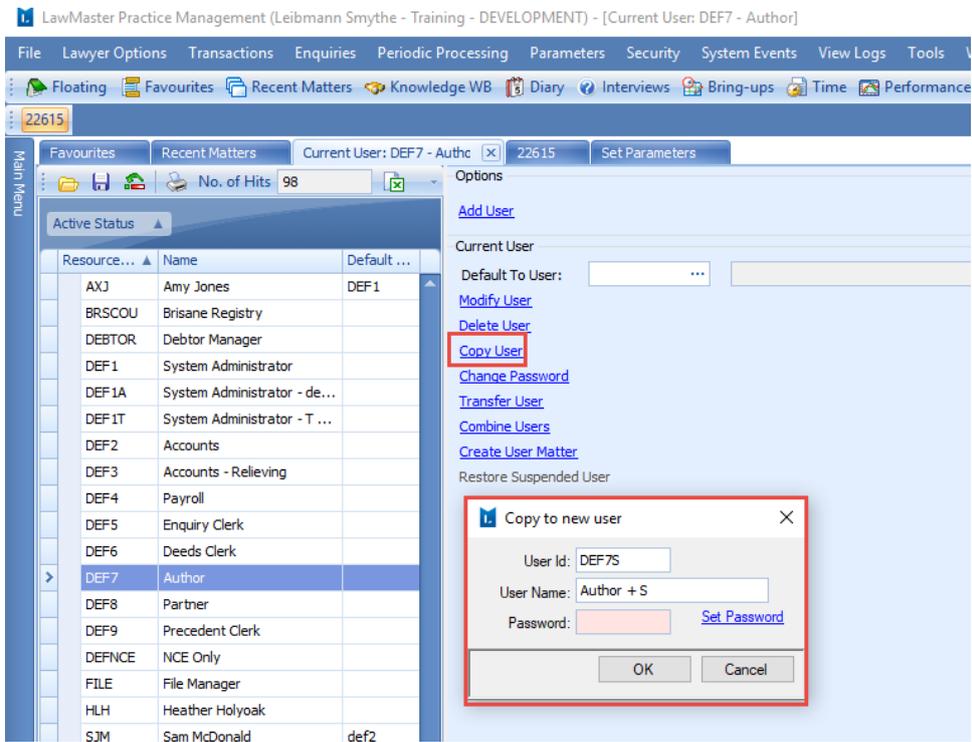
Note: When selecting multiple users in Step 2, if they have different DEF IDs then this process will need to be repeated for each DEF ID, eg DEF7S, DEF5S, DEF1S...

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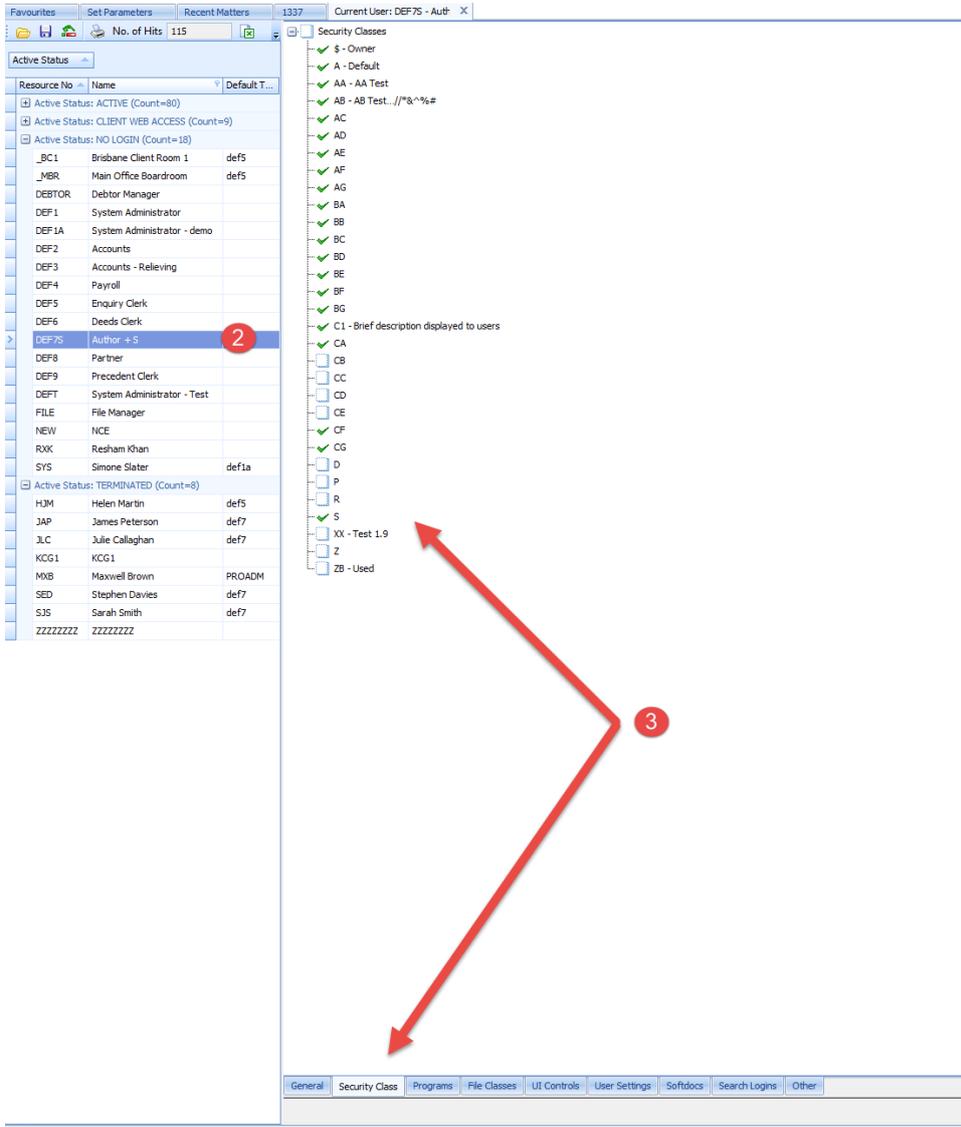
D. Assign the new Default ID(s) to any users that need access to the files with the new security class:

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
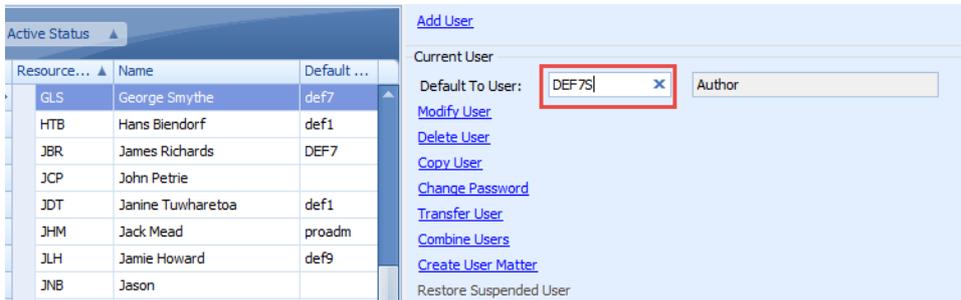
Assign the Matter to the New Security Class:

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 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			FT *	Mr C Russell	O-Outwards
			27143	36032		E		11/08/2021	JDR			re Outgoing Email ...	Jason Ratajczek	O-Outwards
			27142	36031		E		11/08/2021	JDR			re test - - abcde f...	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			ll Position Third Lin...	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			ital_1.pdf	JDR	I-Inwards
			27059	35959				28/05/2021	JDR			1.pdf	JDR	I-Inwards
			27058	35958				24/05/2021	JDR			re test photo - - a...	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			u will see that the f...		X-Internal
			26997	0		E		18/03/2021	JDR					X-Internal
			26996	0		E		18/03/2021	JDR			e that the full preci...		X-Internal
			26995	0				18/03/2021	JDR			e that the full preci...		X-Internal
			26994	0				18/03/2021	JDR			see that the full pr...		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	re test - - abcde f...	Jason Ratajczek	I-Inwards
			26903	35825				27/10/2020	JDR			FT *	Mr C Russell	O-Outwards

Context menu:

- 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 ▶

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