Legal Aid
Agency

Contracted Work & Administration (CWA) User Guide for Providers

Section 4: Administration

April 2013

Version 7.0

Contents

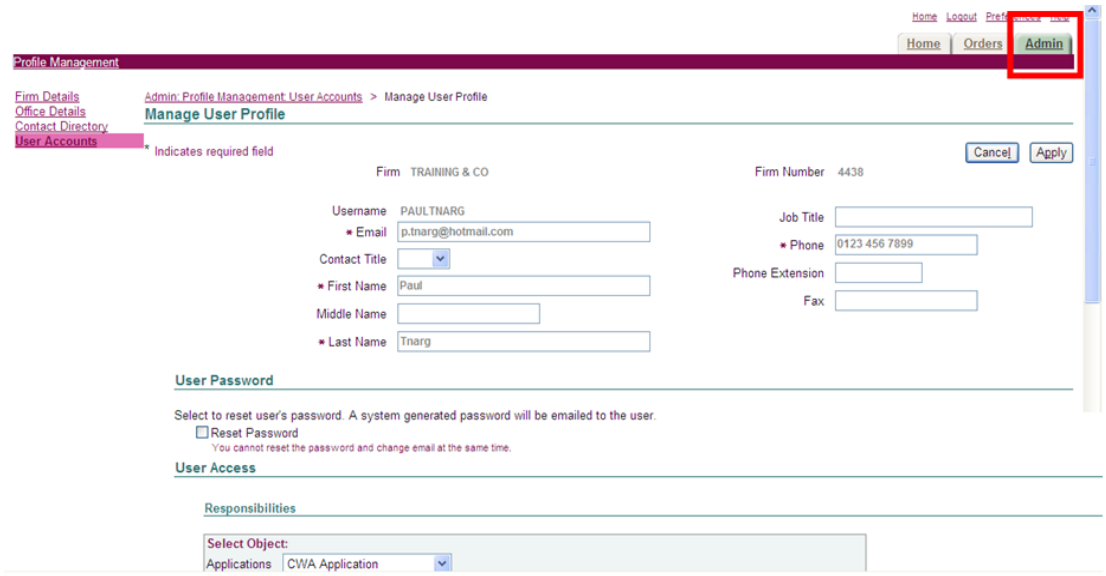
Administration

Introduction

In this section of the User Guide we will look at the Administration area of Contracted Work and Administration (CWA)

Administration is available from the Admin Tab and is split into four main areas:

- Firm Details
- Office Details
- Contact Directory
- User Accounts

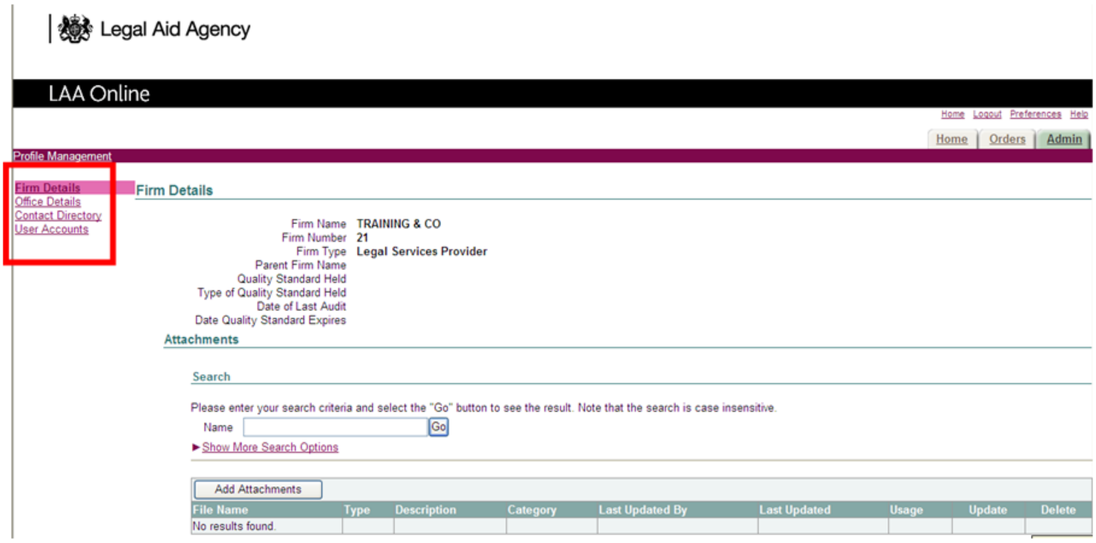


The CWA Firm Sysadmin user can view and modify the information in all of the Admin screens

Viewing Firm and Office Information

Introduction

The Contact Information for your Firm and associated Offices is located in the Admin section of CWA. Use the menu on the left to access each screen.



Firm Details

The Firm name and number are displayed. The Firm number has been generated by the system; it is not your Account Number.

Ignore the Attachments option on this screen. It is not currently being used by the LAA.

Office Details

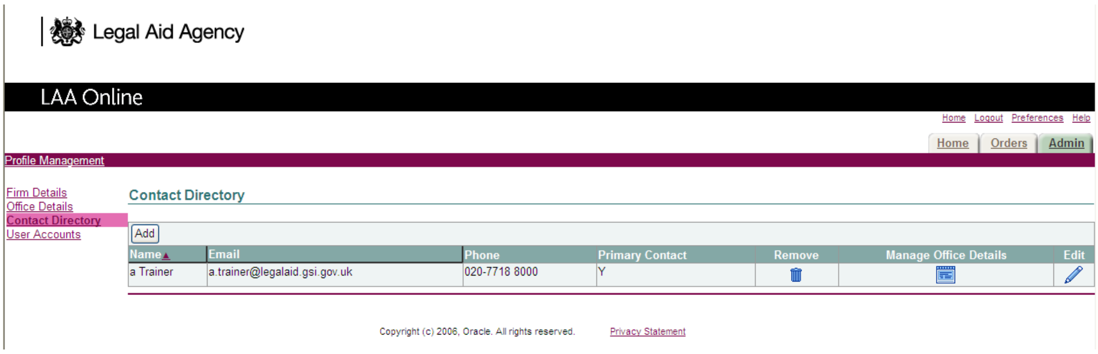
Office Details lists the offices linked to the Firm. It displays the office/s Account Number and Address. If the address information is incorrect, please contact your Contract Manager.

Contact Directory - Add and Edit Contacts

Contacts are listed in the **Contact Directory** in CWA. This is located in the Admin section. You can add new contacts, edit existing contacts and remove contacts from this screen.

Contacts are used as reference points for the LAA to contact your firm. A contact does not need to be a CWA user.

To add and edit contacts, you must be logged into CWA as a **CWA Firm Sysadmin** user.



Primary Contacts

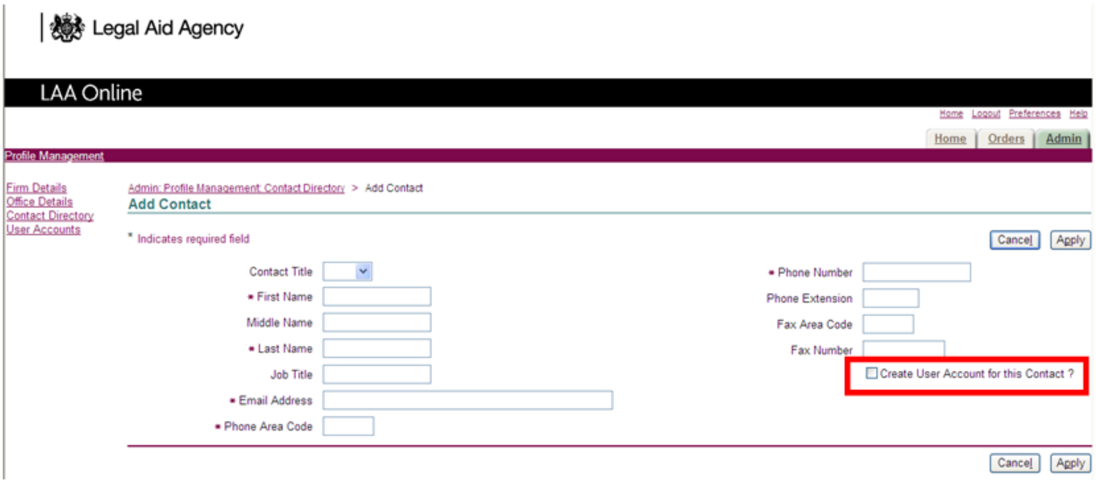
The Contact Directory will indicate who the designated Primary Contact is for your firm. The Primary Contact is the main point of contact for the LAA when contacting your firm. If you wish to change your designated Primary Contact, contact your Contract Manager. Do not delete them from the directory.

The Primary Contact will be allocated the job title '**Liaison Manager**'. Do not change this job title.

Creating New Contacts

Click on the Add Button on the Contact Directory screen

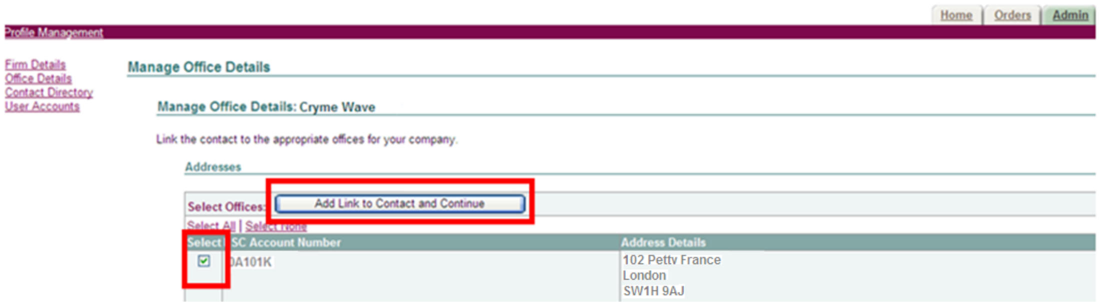
The Add Contact form will be displayed.



Enter the details of the new contact and click on Apply. All of the fields marked with an asterisk are mandatory.

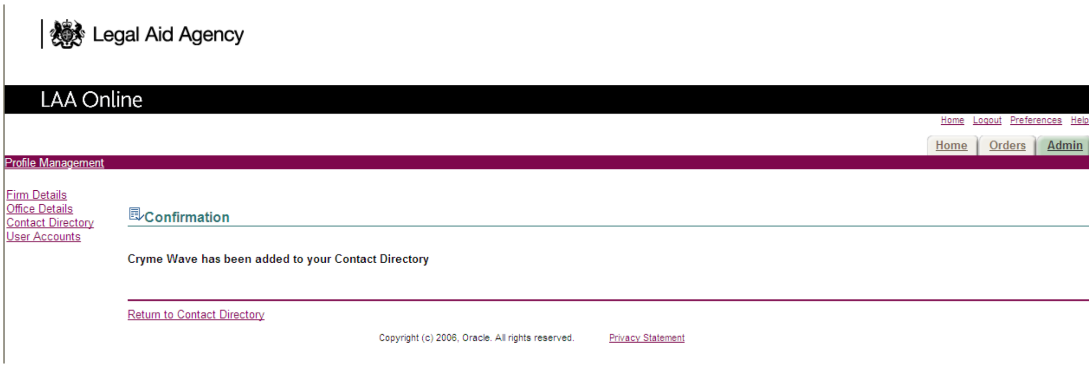
Note that you can create a user account for this contact at the same time by ticking the relevant box.

You must now select the office(s) to which this contact is linked. Select the office by checking the **Select** box.



Click on the **Add link to Contact and Continue** button.

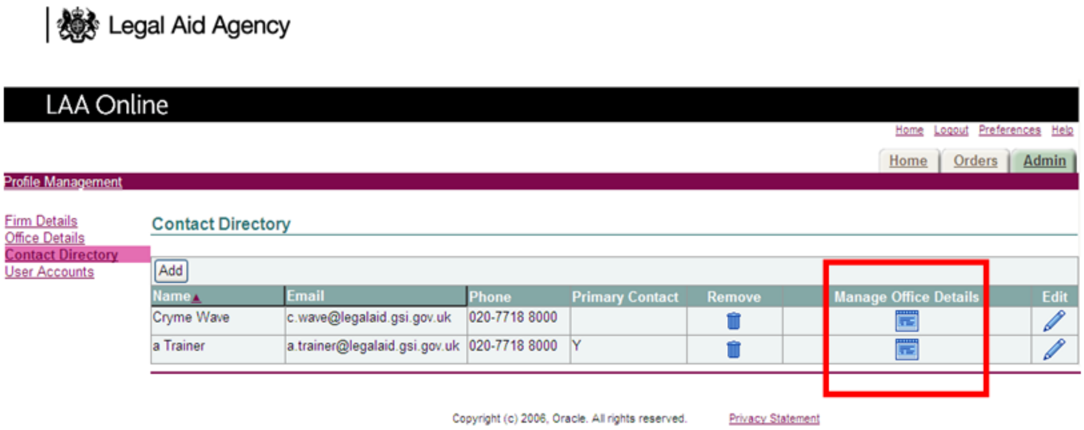
A confirmation message is displayed to confirm your action. Click on the link to **Return to the Contact Directory.**



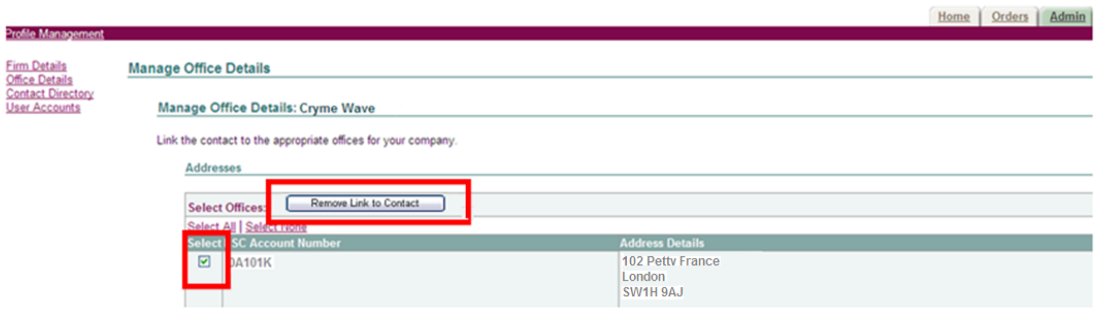
Managing Contacts

Once a contact has been created, you can view the office(s) they are linked to and edit their details.

Click on the **Manage Office Details** icon for the contact whose details you wish to manage.



You can choose to remove an office from a contact but there must always be a minimum of one office per contact. Note that the Primary Contact will be linked to all of the offices.

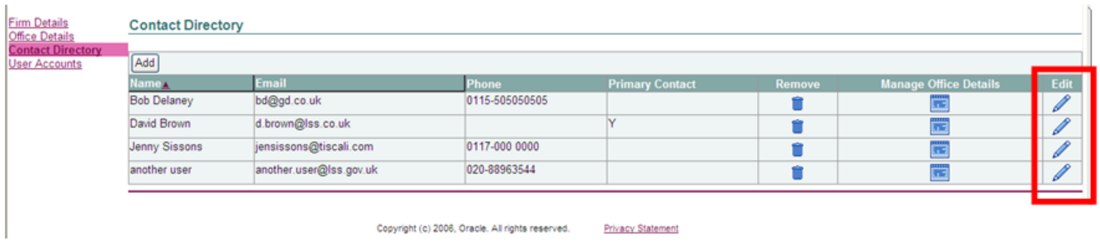


To return to the Contact Directory, click on **Contact Directory** in the menu.

Editing Contacts

You can edit the details of any contact shown in the Contact Directory.

Click on the **Edit** button for the contact whose details you wish to modify.



The Edit Contact screen will be displayed. **Do not** edit the Job Title for contacts with the title ‘Liaison Manager’. You can edit all other fields.

Click the Apply button to save the changes.

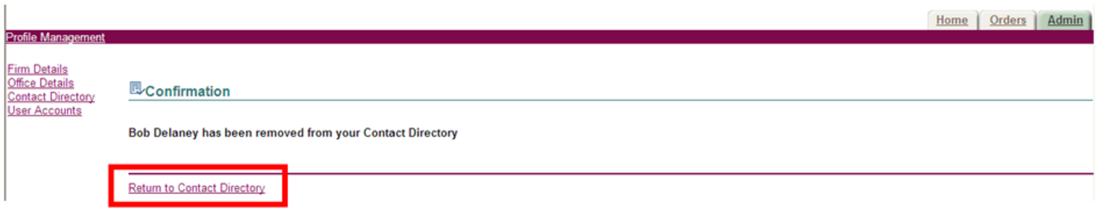
A confirmation message will be displayed to confirm that the changes to the contact have been saved. Click on the **Return to Contact Directory** link.

Remove a Contact

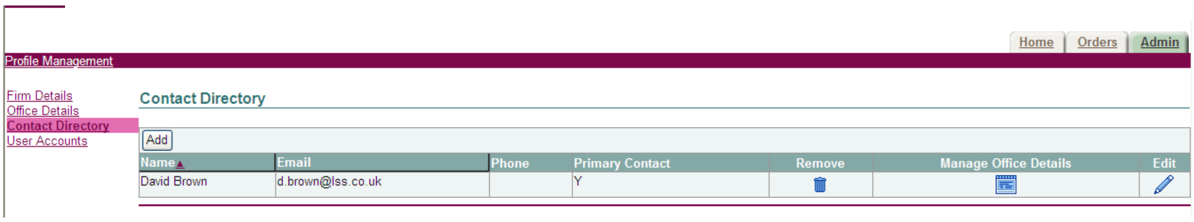
If one of the contacts leaves the firm, you should remove them from the list.

If the Primary Contact leaves the firm, please **do not** remove them from the list. Contact your Contract Manager to request the change.

To remove a contact, click on the Remove button.



You will be presented with a confirmation message to confirm the removal. Click on the **Return to Contact Directory** link.



The contact has been removed from the Contact Directory.

CWA User Accounts

Introduction

You must be logged into CWA as a CWA Firm Sysadmin User to view and create CWA user accounts for your firm. CWA Firm Sysadmin users can also modify existing user accounts.

Each firm is set up with a minimum of one CWA Firm Sysadmin user.

You will be asked to enter some basic information about the user, select one or more roles for the user and if applicable apply an office restriction. The user role determines the functionality that the user will be able to access.

Explanation of User Roles

You will be asked to select one or more of these roles for the user that you are creating:

CWA Firm Manager - View Contracts, Schedules, Reports and Previous Submissions for the whole firm and individual offices.

CWA Office Manager - View Contracts, Schedules, Reports and Previous Submissions for assigned offices only.

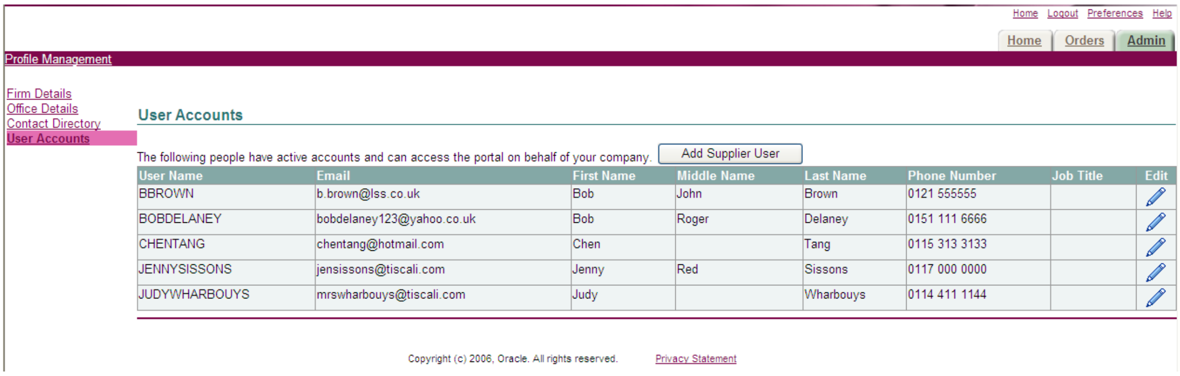
CWA Activity Reporter - Enter and edit outcomes but cannot submit to the LAA.

CWA Activity Reporter Manager - Enter/edit outcomes and can submit to the LAA.

CWA Firm Sysadmin - High level role, gives the ability to set up and maintain users including assigning roles and office restrictions.

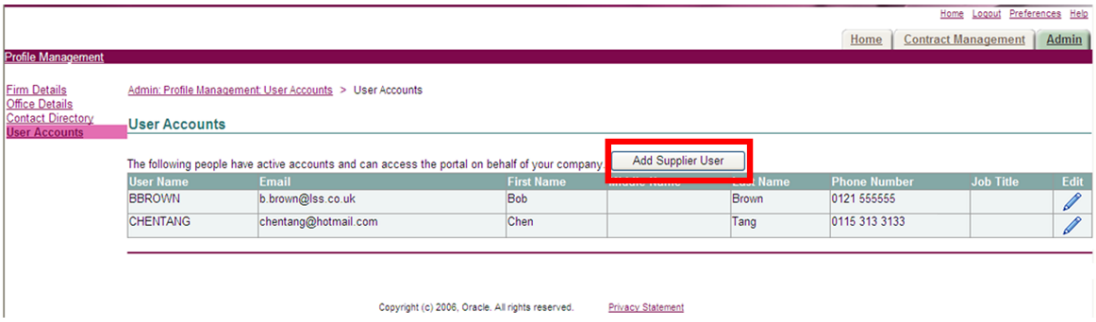
Locating User Accounts

CWA User Accounts are created in the User Accounts screen. To locate the screen, click on the Admin Tab and select User Accounts from the menu options.



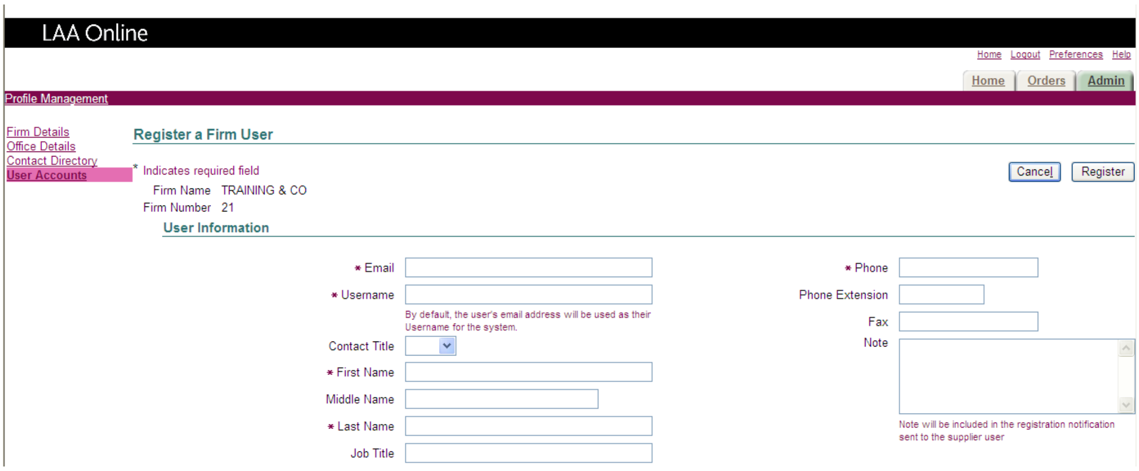
The screen displays all of the current CWA users for the Firm.

Creating User Accounts



Click on Add Supplier User.

The **Register a Firm User screen** is displayed. The form is divided into three sections. The first section is User Information.



User Information

There are a number of compulsory fields to complete about the user. These are marked with asterisks. None of the fields in this form are case sensitive.

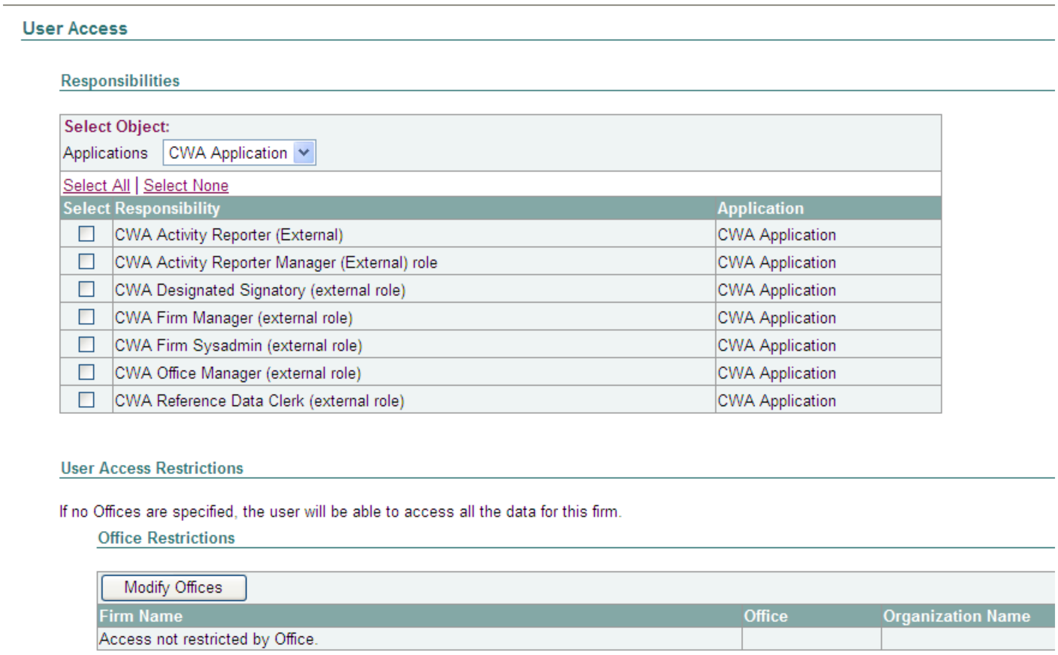
Enter the email address for the user.

The User Name will default to the email address, but this should be overwritten.

The suggested format for CWA Usernames is FIRSTNAMELASTNAME, followed by a number if the user name already exists. However you can choose a different format as long as the User Name is unique. Enter as much information as possible about the new user. The last field is a free text field. The contents of this field will appear in the email to the new user.

User Access

The second section is User Access. You may need to scroll down the screen to view this section.

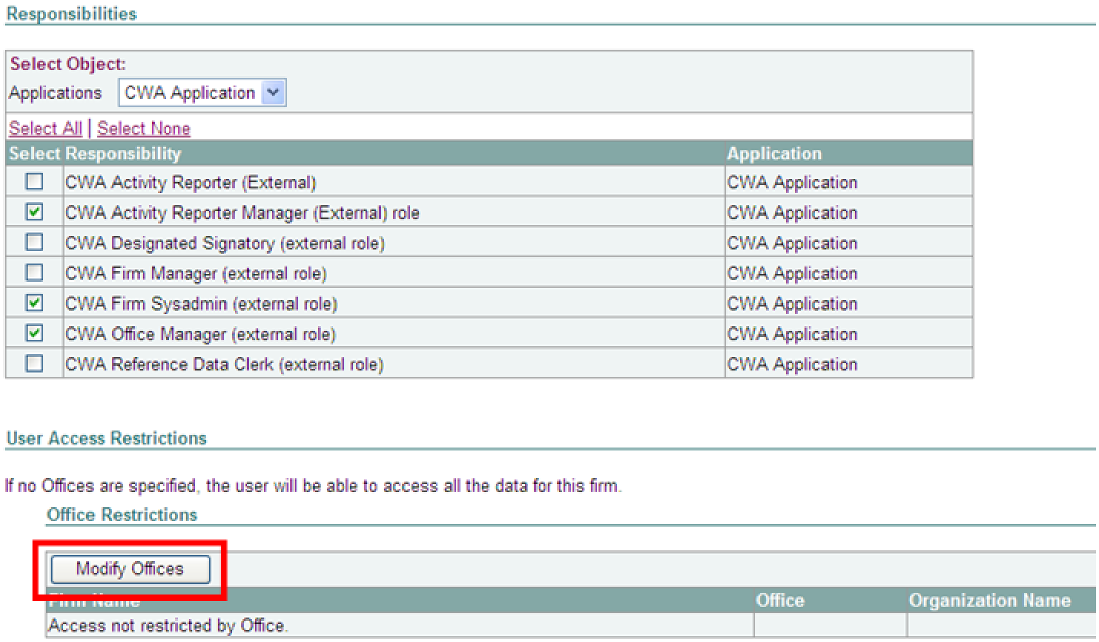


Select the User Roles (Responsibilities) that the new user requires. Please refer to the guidance on User Roles for more information. **Note** Never give a user all the roles unless absolutely necessary.

It is important to give users the appropriate role according to the functionality that they require.

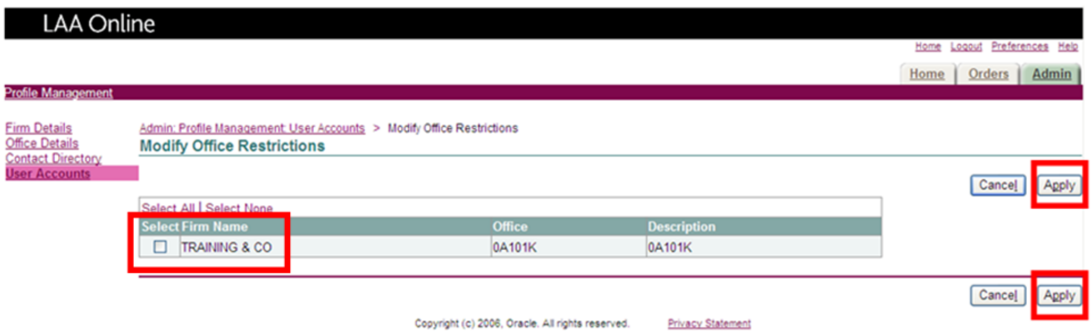
Office Restrictions

Finally you have the option to add a restriction to this user's account. By applying an office restriction, the user will only be able to view and edit data for a specific office in the Firm.



If you do not apply an office restriction, the user will be able to view and edit data for all offices.

To view a list of the offices select Modify Offices.



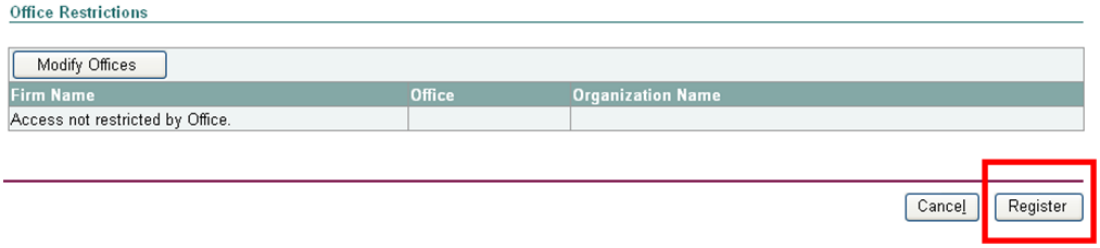
Select the office that you want the user **not** to have access to.

Click on Apply.

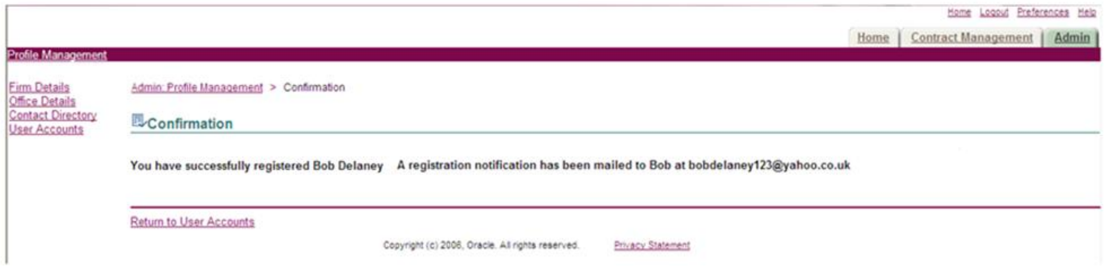
Register User

The office's information has now been populated into the table at the bottom of the screen. The final step is to register the user.

Click on the Register button to create the User Account.



A confirmation message will be displayed to confirm the User Account has been created.



The new user will be notified by email.

Modifying User Accounts

To modify a user account you must be logged into CWA with the CWA Firm Sysadmin Role.

You can modify the following parts of the user account:

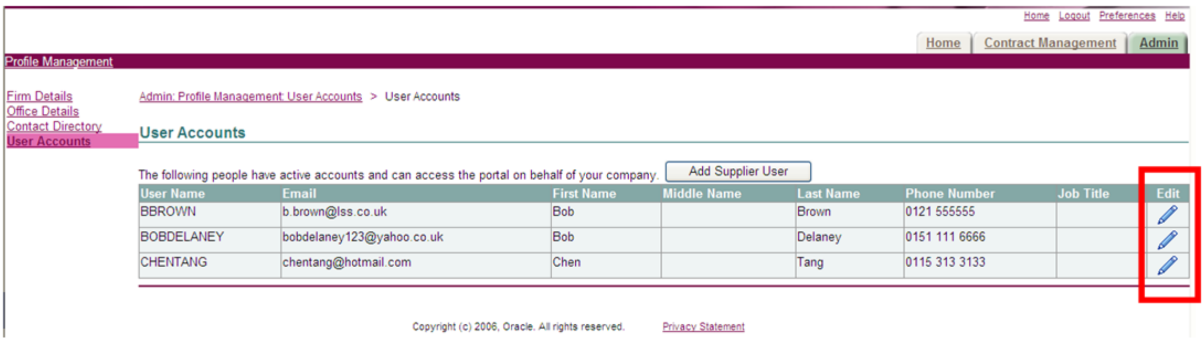
Personal Details e.g. First Name, Last Name, Telephone Number, Email Address.

Add/Remove Responsibilities e.g. give a user the CWA Activity Reporter Manager role so that they can make submissions.

Office Restrictions e.g. restrict a user so they can only view the details of one of the offices in your firm.

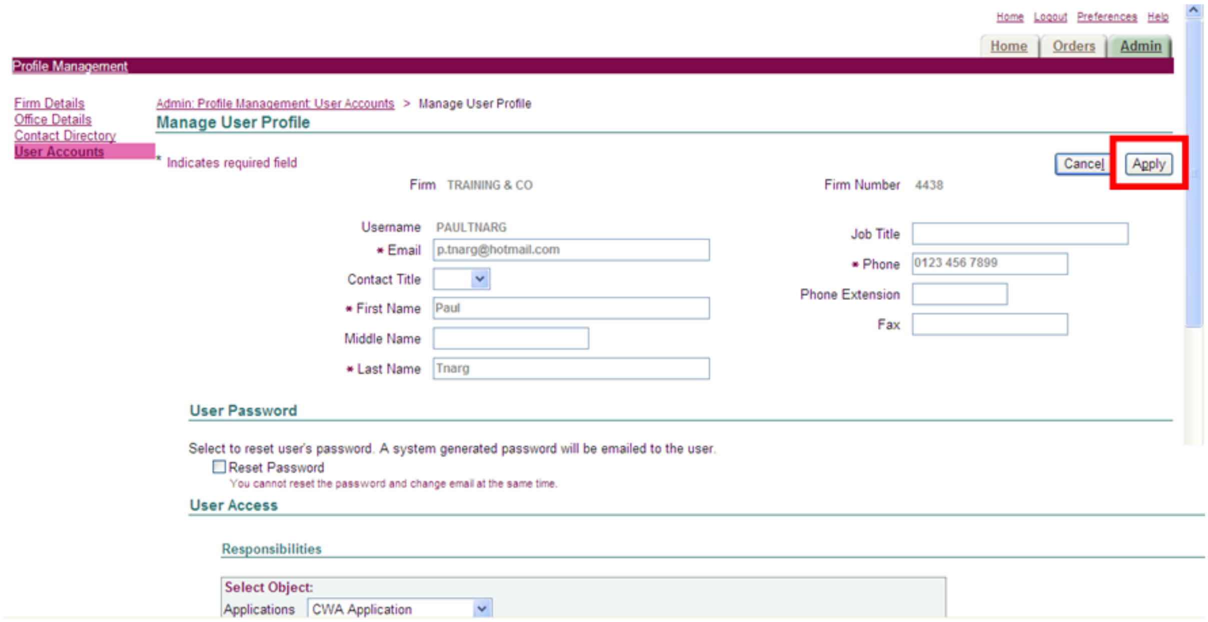
You cannot modify the Username or Password for the user.

To obtain a new password, the user should click on the Forgotten Password link on the Online Portal login page. They will be sent an email containing a new password. User Accounts can be modified in the User Accounts screen.



Click on the Edit icon for the user whose details you wish to modify.

The Manage User Profile screen will be displayed.



You can modify any of the details e.g. User Information, User Access and Office Restriction. The only details you cannot modify are the User name and Password.

Click on the Apply button to save the changes that you have made.

A confirmation message will be displayed.

Return to User Accounts Page using the link at the bottom of the screen.

Disabling a User Account

If you no longer wish for one of the CWA users in your firm to have access to CWA, you must contact the Online Support team.

The Online Support team will arrange for their account to be disabled.

Please email online-support@legalaid.gsi.gov.uk with the details of the user whose account you wish to be disabled.