



Legal Aid
Agency

Contracted Work & Administration (CWA) User Guide for Providers

Section 4: Administration

March 2018

Version 8.0

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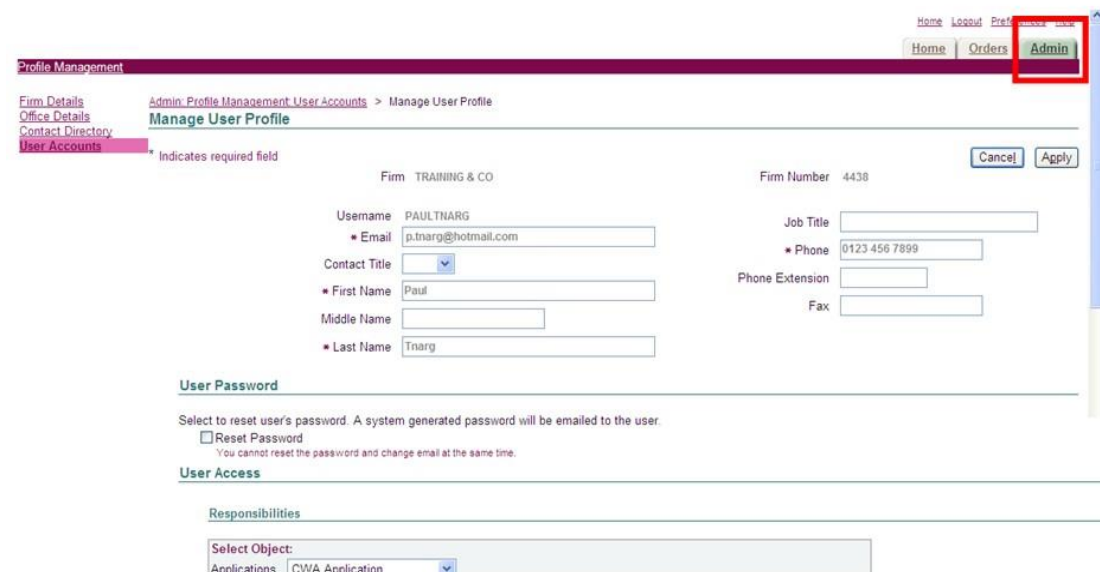
Administration

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 screenshot shows a web application interface for managing user profiles. At the top right, there is a navigation bar with buttons for 'Home', 'Orders', and 'Admin'. The 'Admin' button is highlighted with a red box. Below the navigation bar, there is a breadcrumb trail: 'Admin: Profile Management: User Accounts > Manage User Profile'. The main content area is titled 'Manage User Profile' and contains several sections:

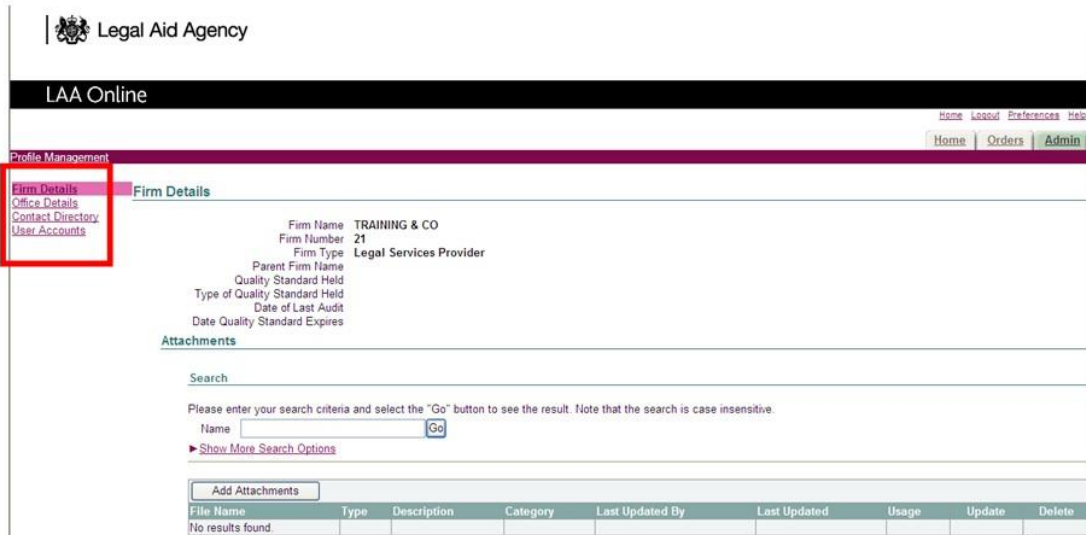
- Firm Details:** Firm: TRAINING & CO, Firm Number: 4438. Buttons for 'Cancel' and 'Apply' are visible.
- User Information:** Username: PAULTNARG, Email: p.tnarg@hotmail.com, Contact Title: (dropdown), First Name: Paul, Middle Name: (text), Last Name: Tnarg.
- Phone Information:** Job Title: (text), Phone: 0123 456 7899, Phone Extension: (text), Fax: (text).
- User Password:** A section with a checkbox for 'Reset Password' and a note: 'Select to reset user's password. A system generated password will be emailed to the user. You cannot reset the password and change email at the same time.'
- User Access:** A section with a 'Select Object:' dropdown menu currently set to 'CWA Application'.

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.

Office Details

Account Number ▲	Address Details
0A101K	102 Pettv France London SW1H 9AJ

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.

Legal Aid Agency

LAA Online

Home Logout Preferences Help

Home Orders Admin

Profile Management

Firm Details Office Details **Contact Directory** User Accounts

Add

Name	Email	Phone	Primary Contact	Remove	Manage Office Details	Edit
a Trainer	a.trainer@legalaid.gsi.gov.uk	020-7718 8000	Y			

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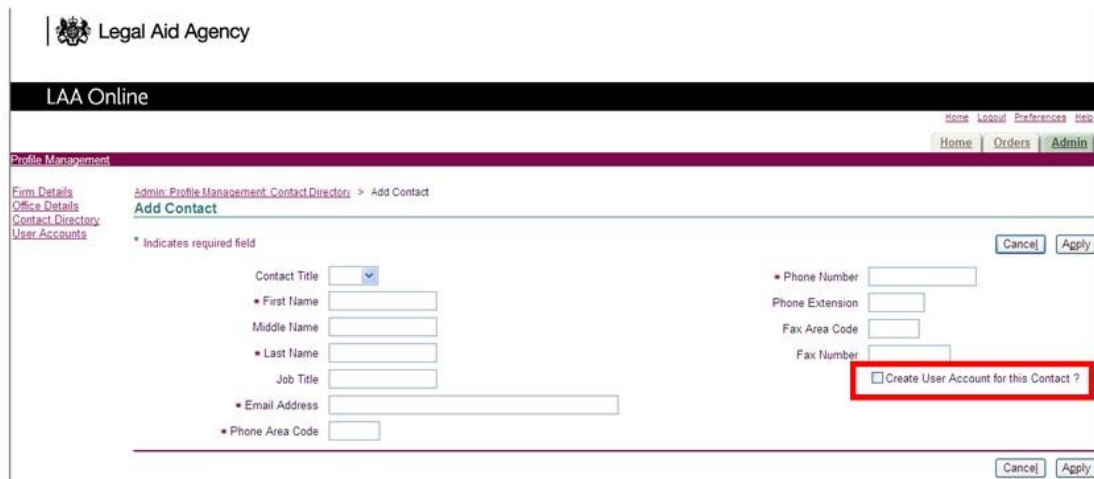
Primary Contacts

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. You will no longer be able to delete the 'Liaison Manager' from the Directory.

The Primary Contact will be allocated the job title '**Liaison Manager**'. You will no longer be able to change this job title.

Creating New Contacts

Click on the Add Button on the Contact Directory screen The Add Contact form will be displayed.



Legal Aid Agency

LAA Online

Home Logout Preferences Help

Home Orders Admin

Profile Management

Firm Details
Office Details
Contact Directory
User Accounts

Admin Profile Management Contact Directory > Add Contact

Add Contact

* Indicates required field

Contact Title

* First Name

Middle Name

* Last Name

Job Title

* Email Address

* Phone Area Code

* Phone Number

Phone Extension

Fax Area Code

Fax Number

Create User Account for this Contact ?

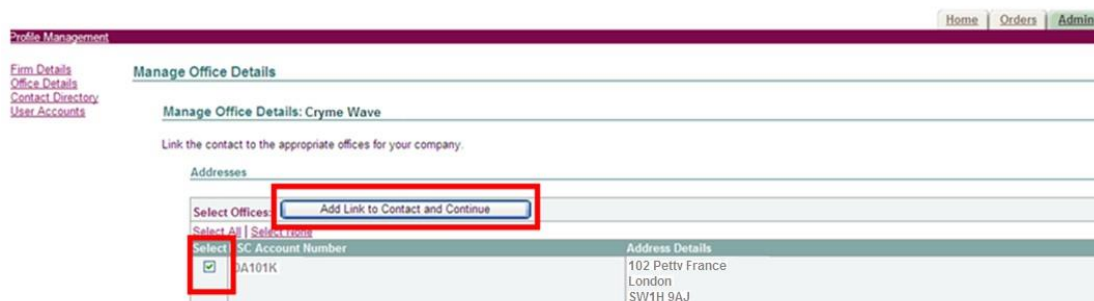
Cancel Apply

Cancel Apply

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.



Home Orders Admin

Profile Management

Firm Details
Office Details
Contact Directory
User Accounts

Manage Office Details

Manage Office Details: Cryme Wave

Link the contact to the appropriate offices for your company.

Addresses

Select Offices:

Select All | Select None

Select	SC Account Number	Address Details
<input checked="" type="checkbox"/>	JA101K	102 Pettit France London SW1H 9AJ

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**.

The screenshot displays the LAA Online web interface. At the top left, there is a logo for the Legal Aid Agency. Below it, a black header bar contains the text "LAA Online". To the right of the header, there are navigation links: "Home", "Logout", "Preferences", and "Help". Below the header, a purple bar contains the text "Profile Management". On the left side, there is a vertical menu with links for "Firm Details", "Office Details", "Contact Directory", and "User Accounts". The main content area shows a confirmation message: "Confirmation" followed by "Cryme Wave has been added to your Contact Directory". Below this message is a link that says "Return to Contact Directory". At the bottom of the page, there is a copyright notice: "Copyright (c) 2006, Oracle. All rights reserved." and a link for "Privacy Statement".

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.

Legal Aid Agency

LAA Online

Home Logout Preferences Help

Home Orders Admin

Profile Management

Firm Details
Office Details
Contact Directory
User Accounts

Contact Directory

Name	Email	Phone	Primary Contact	Remove	Manage Office Details	Edit
Cryme Wave	c.wave@legalaid.gsi.gov.uk	020-7718 8000				
a Trainer	a.trainer@legalaid.gsi.gov.uk	020-7718 8000	Y			

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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.

Home Orders Admin

Profile Management

Firm Details
Office Details
Contact Directory
User Accounts

Manage Office Details

Manage Office Details: Cryme Wave

Link the contact to the appropriate offices for your company.

Addresses

Select Offices:

Select All | Select None

Select	SC Account Number	Address Details
<input checked="" type="checkbox"/>	JA101K	102 Pettv France London SW1H 9AJ

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

Editing Contacts

You can no longer edit the details of any contact shown in the Contact Directory. Therefore, if you wish changes to be made to your firms contact in the Contact Directory. You should email Provider Records with the changes to be made.

[Firm Details](#)
[Office Details](#)
Contact Directory
[User Accounts](#)

Name	Email	Phone	Primary Contact	Remove	Manage Office Details	Edit
Bob Delaney	bd@gd.co.uk	0115-5050505				
David Brown	d.brown@iss.co.uk		Y			
Jenny Sissons	jensissons@tiscali.com	0117-000 0000				
another user	another.user@iss.gov.uk	020-88963544				

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[Firm Details](#)
[Office Details](#)
Contact Directory
[User Accounts](#)

Admin: Profile Management: Contact Directory > Edit Contact
Edit Contact

* Indicates required field

Contact Title

* First Name

Middle Name

* Last Name

Job Title

* Email Address

* Phone Area Code

* Phone Number

Phone Extension

Fax Area Code

Fax Number

[Firm Details](#)
[Office Details](#)
Contact Directory
[User Accounts](#)

Confirmation

Contact details for Jenny Sissons have been saved

[Return to Contact Directory](#)

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Remove a Contact

If one of the contact leaves the firm, you should email Provider Records to request that the contact be removed from the list.

If the Primary Contact leaves the firm, you will no longer be able to remove them from the list.

Contact your Contract Manager or Provider Records to request the change.

[Home](#) [Logout](#) [Preferences](#) [Help](#)
[Home](#) [Orders](#) [Admin](#)

Profile Management

[Firm Details](#)
[Office Details](#)
Contact Directory
[User Accounts](#)

Admin: Profile Management: Contact Directory > Contact Directory
Contact Directory

Name	Email	Phone	Primary Contact	Remove	Manage Office Details	Edit
David Brown	d.brown@iss.co.uk		Y			
Bob Delaney	bobdelaney123@yahoo.co.uk	0151-444 1111				



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.



Home Logout Preferences Help


Home Orders Admin

Profile Management

Firm Details
Office Details
Contact Directory
User Accounts

User Accounts

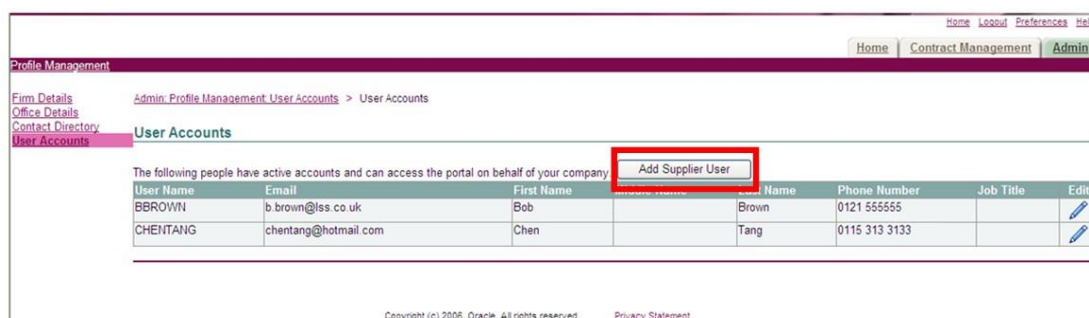
The following people have active accounts and can access the portal on behalf of your company.

User Name	Email	First Name	Middle Name	Last Name	Phone Number	Job Title	Edit
BBROWN	b.brown@lss.co.uk	Bob	John	Brown	0121 555555		
BOBDELANEY	bobdelaney123@yahoo.co.uk	Bob	Roger	Delaney	0151 111 6666		
CHENTANG	chentang@hotmail.com	Chen		Tang	0115 313 3133		
JENNYSISSONS	jensissons@tiscali.com	Jenny	Red	Sissons	0117 000 0000		
JUDYWHARBOUYS	mrswharbouys@tiscali.com	Judy		Wharbouys	0114 411 1144		

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

Creating User Accounts



Home Logout Preferences Help

Home Contract Management Admin



Profile Management

Firm Details
Office Details
Contact Directory
User Accounts

Admin: Profile Management User Accounts > User Accounts

User Accounts

The following people have active accounts and can access the portal on behalf of your company.

User Name	Email	First Name	Middle Name	Last Name	Phone Number	Job Title	Edit
BBROWN	b.brown@lss.co.uk	Bob		Brown	0121 555555		
CHENTANG	chentang@hotmail.com	Chen		Tang	0115 313 3133		

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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.

LAA Online

Home Logout Preferences Help

Home Orders Admin

Profile Management

Firm Details Office Details Contact Directory **User Accounts**

Register a Firm User

* Indicates required field

Firm Name TRAINING & CO

Firm Number 21

User Information

* Email

* Username

By default, the user's email address will be used as their Username for the system.

Contact Title

* First Name

Middle Name

* Last Name

Job Title

* Phone

Phone Extension

Fax

Note

Note will be included in the registration notification sent to the supplier user

Cancel Register

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.

User Access

Responsibilities

Select Object:
Applications

[Select All](#) | [Select None](#)

Select Responsibility	Application
<input type="checkbox"/> CWA Activity Reporter (External)	CWA Application
<input type="checkbox"/> CWA Activity Reporter Manager (External) role	CWA Application
<input type="checkbox"/> CWA Designated Signatory (external role)	CWA Application
<input type="checkbox"/> CWA Firm Manager (external role)	CWA Application
<input type="checkbox"/> CWA Firm Sysadmin (external role)	CWA Application
<input type="checkbox"/> CWA Office Manager (external role)	CWA Application
<input type="checkbox"/> CWA Reference Data Clerk (external role)	CWA Application

User Access Restrictions

If no Offices are specified, the user will be able to access all the data for this firm.

Office Restrictions

Firm Name	Office	Organization Name
Access not restricted by Office.		

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.

Responsibilities

Select Object:
Applications CWA Application

Select All | Select None

Select Responsibility	Application
<input type="checkbox"/> CWA Activity Reporter (External)	CWA Application
<input checked="" type="checkbox"/> CWA Activity Reporter Manager (External) role	CWA Application
<input type="checkbox"/> CWA Designated Signatory (external role)	CWA Application
<input type="checkbox"/> CWA Firm Manager (external role)	CWA Application
<input checked="" type="checkbox"/> CWA Firm Sysadmin (external role)	CWA Application
<input checked="" type="checkbox"/> CWA Office Manager (external role)	CWA Application
<input type="checkbox"/> CWA Reference Data Clerk (external role)	CWA Application

User Access Restrictions

If no Offices are specified, the user will be able to access all the data for this firm.

Office Restrictions

Modify Offices

Firm Name	Office	Organization Name
Access not restricted by Office.		

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.

LAA Online

Home Logout Preferences Help

Home Orders Admin

Profile Management

Admin Profile Management User Accounts > Modify Office Restrictions

Modify Office Restrictions

Cancel Apply

Select All | Select None

Select Firm Name	Office	Description
<input type="checkbox"/> TRAINING & CO	0A101K	0A101K

Cancel Apply

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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.

Office Restrictions

Modify Offices		
Firm Name	Office	Organization Name
Access not restricted by Office.		

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

Profile Management

Home | Logout | Preferences | Help

Home | Contract Management | Admin

Admin: Profile Management > Confirmation

Confirmation

You have successfully registered Bob Delaney. A registration notification has been mailed to Bob at bobdelaney123@yahoo.co.uk

[Return to User Accounts](#)

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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.

Logout | Preferences | Help

Logged In As SA

Navigator

Edit Navigator

- CWA Activity Reporter (External)
- CWA Activity Reporter Manager (External) role
- CWA Designated Signatory (external role)
- CWA Firm Manager (external role)
- CWA Firm Sysadmin (external role)**
- CWA Office Manager (external role)
- CWA Reference Data Clerk (external role)
- eForms Author
- eForms Firm Administrator
- eForms Reviewer

CWA Firm Sysadmin (external role)

- Home Page

Edit Favorites

You have not selected any favorites. Please use the "Edit Favorites" button to set up your favorites.

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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.

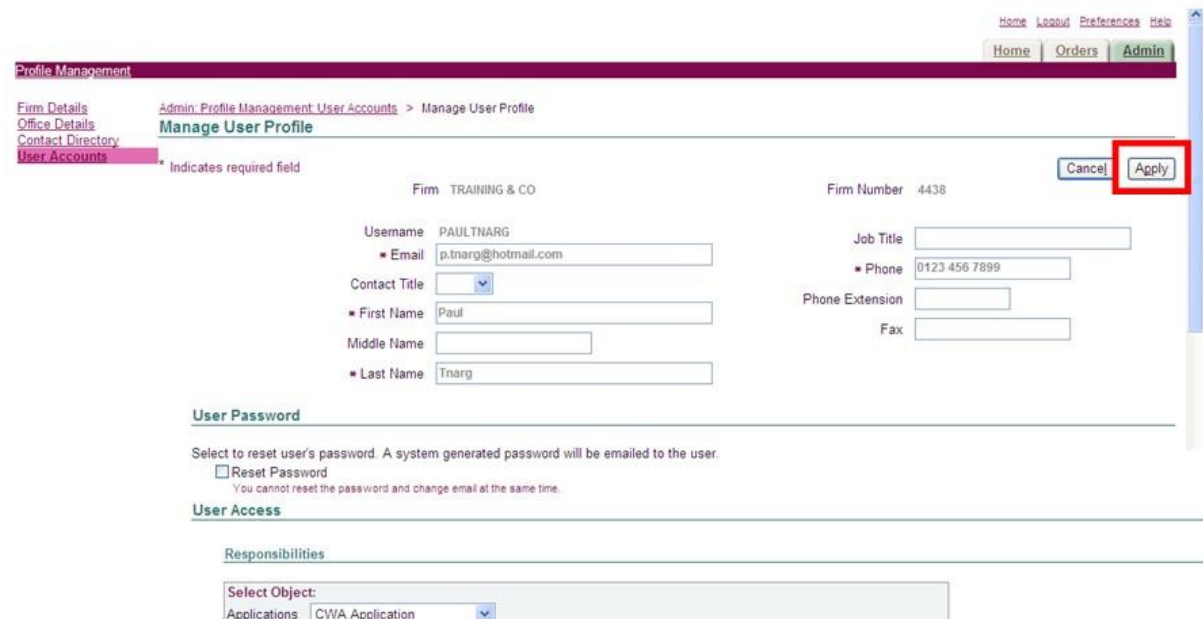
You cannot modify the Username or Password for the user.

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.