11 SYSTEM MANAGEMENT

11.1 Overview

All users and firms are initially entered into Landonline by LINZ System Administrators. They enter the user and firm details, associate users with firms and set up the initial security access levels. The day to day management of firm and user information and user access are managed by a firm's System Manager. Each firm appoints a member of their firm to be their System Manager. A firm may appoint more than one System Manager if required.

System Managers undertake their Landonline duties through the External System Administration screen. This provides access to other screens where user and firm information is maintained and user access levels are set. This chapter explains how a System Manager can:

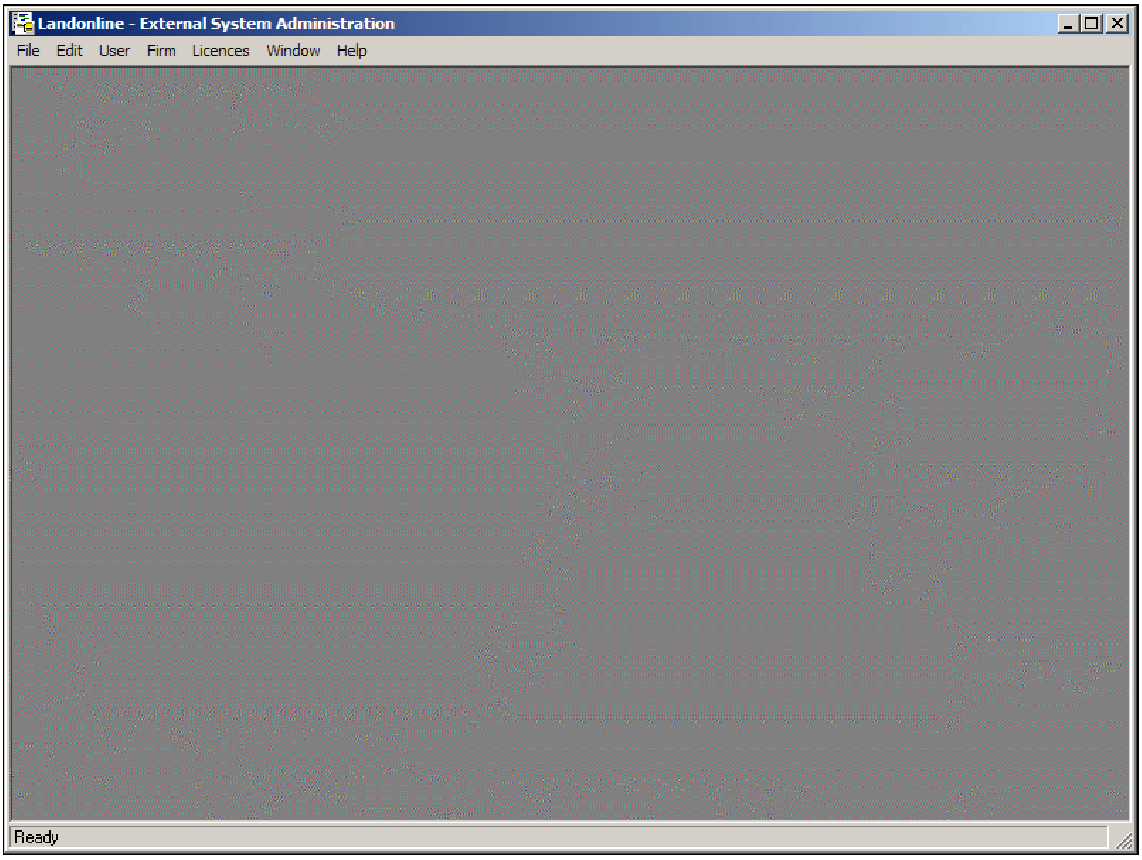
- view an individual user's details
- modify the firm's contact details
- associate and disassociate privileges with a user
- modify user groups
- disassociate a user from the firm
- generate a licence usage report.

Note: Individual users also access the Maintain User screen in External System Administration to update their own details. See topic **3.8 Change your details or password**.

11.2 External System Administration screen

The External System Administration screen provides System Managers with access to the:

- Maintain User screen where System Managers can view a user's details
- Maintain Firm screen where System Managers can maintain their firm's contact details and the privileges of users in their firm.
- Licence Usage Report screen where you can generate a report detailing how licences are used in your firm.

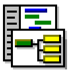


This shows the menus available to a System Manager in the External System Administration screen.

11.2.1 Display the External System Administration screen

Only System Managers can display the External System Administration screen.

To display the External System Administration screen, in Workspace:

1. Click  (System Maintenance) from the Workspace Toolbar.

11.3 View an individual user's details

A System Manager can view a user's contact details and preferences through the Maintain User screen. Individual users maintain their own details.

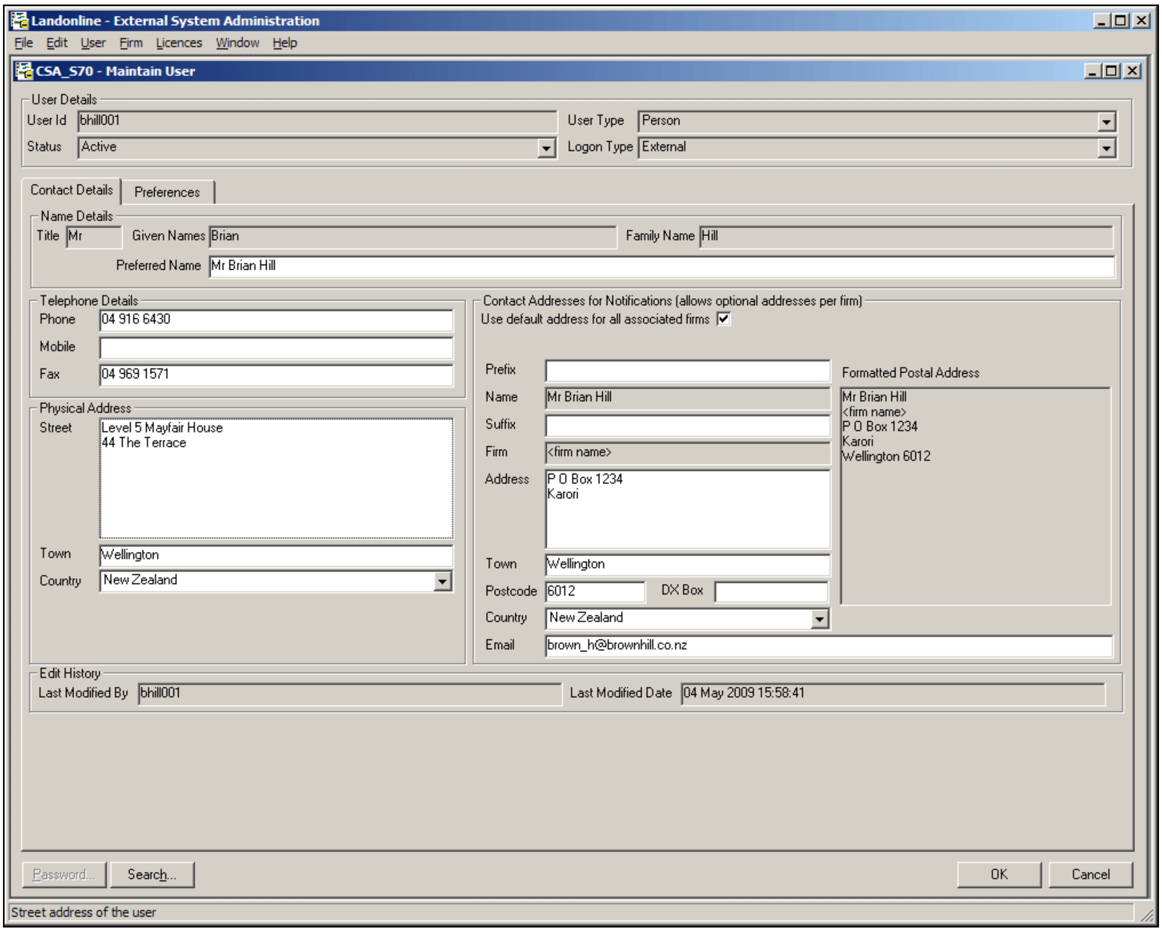
Steps:

To view an individual user's details you:

1. Display the Maintain User screen.
2. Search for the user.
3. View the user's contact details and preferences.

The following headings correspond with these steps and explain them in more detail.

11.3.1 Display the Maintain User screen



When Brian Hill (the System Manager at Brown Hill and Associates) opens the Maintain User screen it displays his user details. Brian must search for a user to display their details.

To display the Maintain User screen, in External System Administration:

1. Select **User | Maintain User…**

11.3.2 Search for the user

When the Maintain User screen is opened by a System Manager it displays their user details. The System Manager must search for a user to display their details. The selected user’s details will display in the User Details area. These cannot be modified. The selected users contact details will display in the Contact Details tab, and their preferences will display in the Preferences tab.

To search for the user:

1. Click Search... to display the External Search screen.
2. Search for the user. See topic **4.2.2 Search for a user or firm and add the details to the current screen**.

11.3.3 View user contact details and preferences

To view a user's contact details and preferences, select the Contact Details tab and Preferences tab in the Maintain User screen. For more information, see topic **3.8.1 Change your details**.

11.4 Modify your firm's contact and user details

A System Manager can maintain a firm's contact details through the Maintain Firm screen. They can also modify user details as they relate to the firm (eg the branch a user works for).

Tasks:

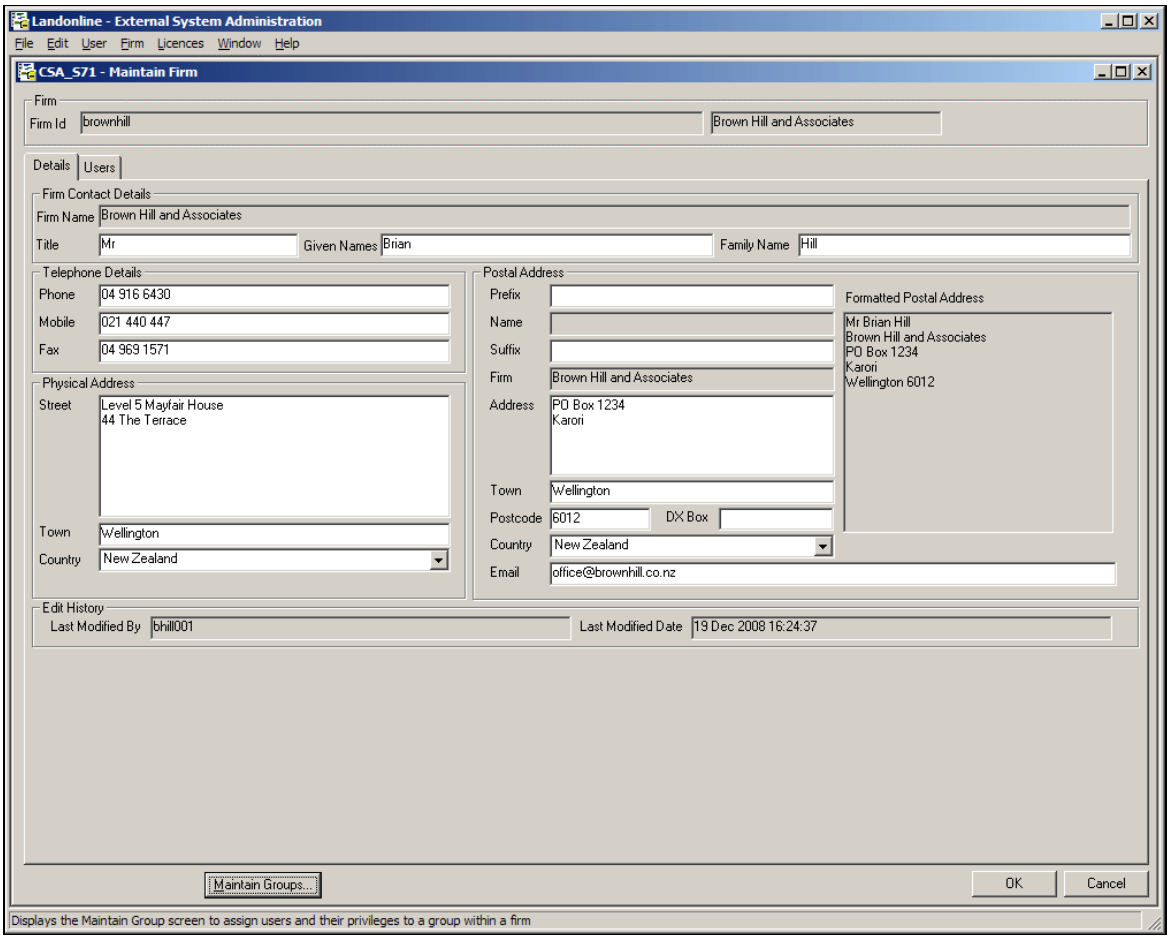
To maintain a firm's contact details System Managers:

- Display the Maintain Firm screen.
- Modify the required details in the Details tab.
- Modify a users details as they relate to a firm.

The following headings correspond with these tasks and describe them in more detail.

11.4.1 Display the Maintain Firm screen

The Maintain Firm screen is where System Managers can modify their own firm's details and manage users.



The System Manager from Brown, Hill and Associates has opened the Maintain Firm screen to update the address details for the firm.

To display the Maintain Firm screen, in External System Administration:

1. Select **Firm | Maintain Firm…**

When the Maintain Firm screen is opened the firm's details display. The System Manager can only view their own firm's details.

11.4.2 Modify firm details in the Details tab

In the Details tab of the Maintain Firm screen:

1. Update the contact person and address details if required. The contact person receives all general communications on behalf of the firm. Do not use an apostrophe ('), double quotation (") or pipe (|) in any field in the Details tab.
2. Save the changes.

Note: To maintain the method by which your firm receives specific notifications, refer to the **Notices User Guide**.

11.4.3 Modify user details for the firm

In the Maintain Firm screen:

1. Select the Users tab to display the users for the firm.
2. Select the user.
3. Modify the Firm Office (branch) or Default Licence for the user if required.
4. Save the changes.

Note:

- You cannot alter any other details for the user in the Associated Users list.
- A check in the Contractor field indicates the user is a contractor to your firm. A contractor is a user who performs work for your firm but is not a member of your firm. They can be affiliated to more than one firm.

11.5 Maintain user privileges in your firm

User privileges are associated with a user through the Maintain Firm screen. Privileges determine what actions a user can perform in Landonline (eg certify an *e-survey*). The System Manager allocates appropriate privileges to each user based on their role (eg, Searches, Surveyor, Primary Contact). The privileges the System Manager can allocate to a user are limited to those allowed by the types of Landonline licences allocated to the firm. For example, if the firm didn't have a licence that enabled Searches then a user could not be assigned the privileges required to search.

Steps:

To allocate privileges to, or remove privileges from, a user:

1. Display the Maintain Firm screen.
2. Display the user's privileges in the Allocate Privilege screen.
3. Allocate privileges or remove privileges.

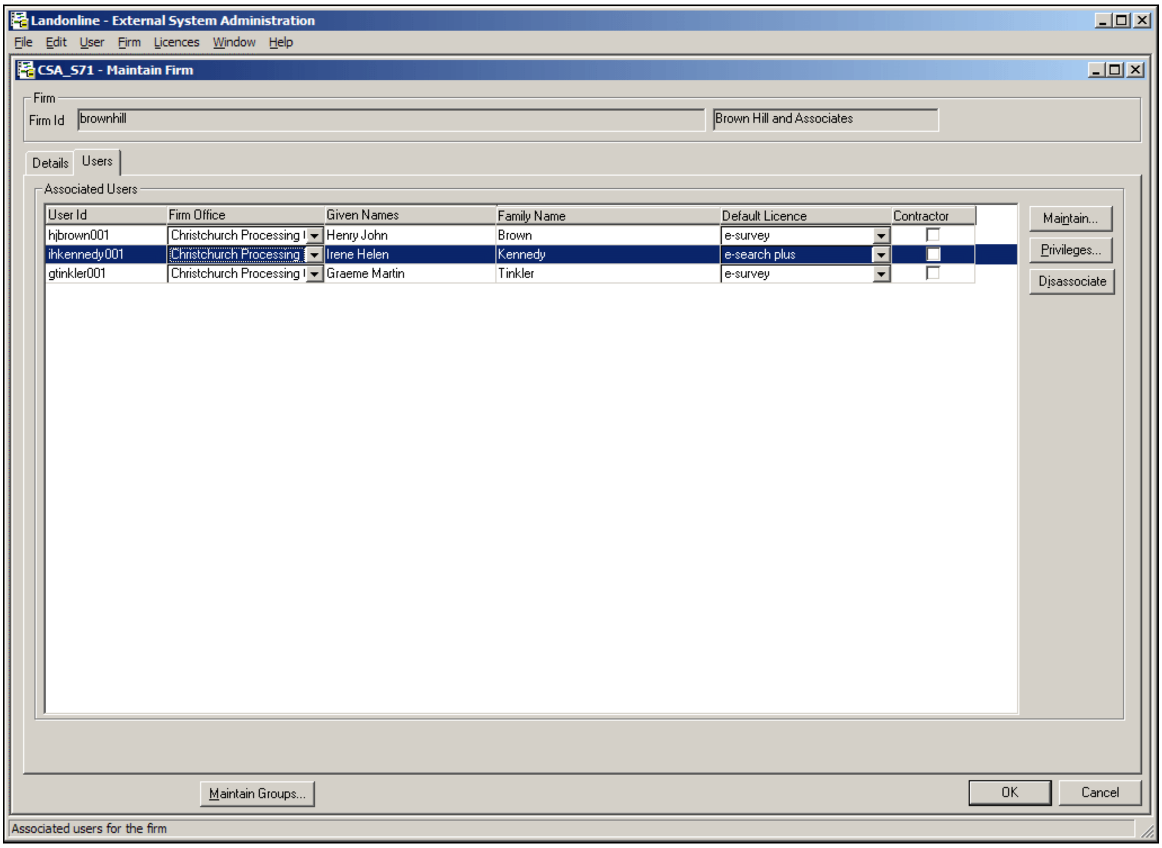
The following headings correspond with these steps and describe them in more detail.

11.5.1 Display the Maintain Firm screen

To **display** the Maintain Firm screen:

1. See topic **11.4.1 Display the Maintain Firm screen**.

11.5.2 Display the Allocate Privileges screen

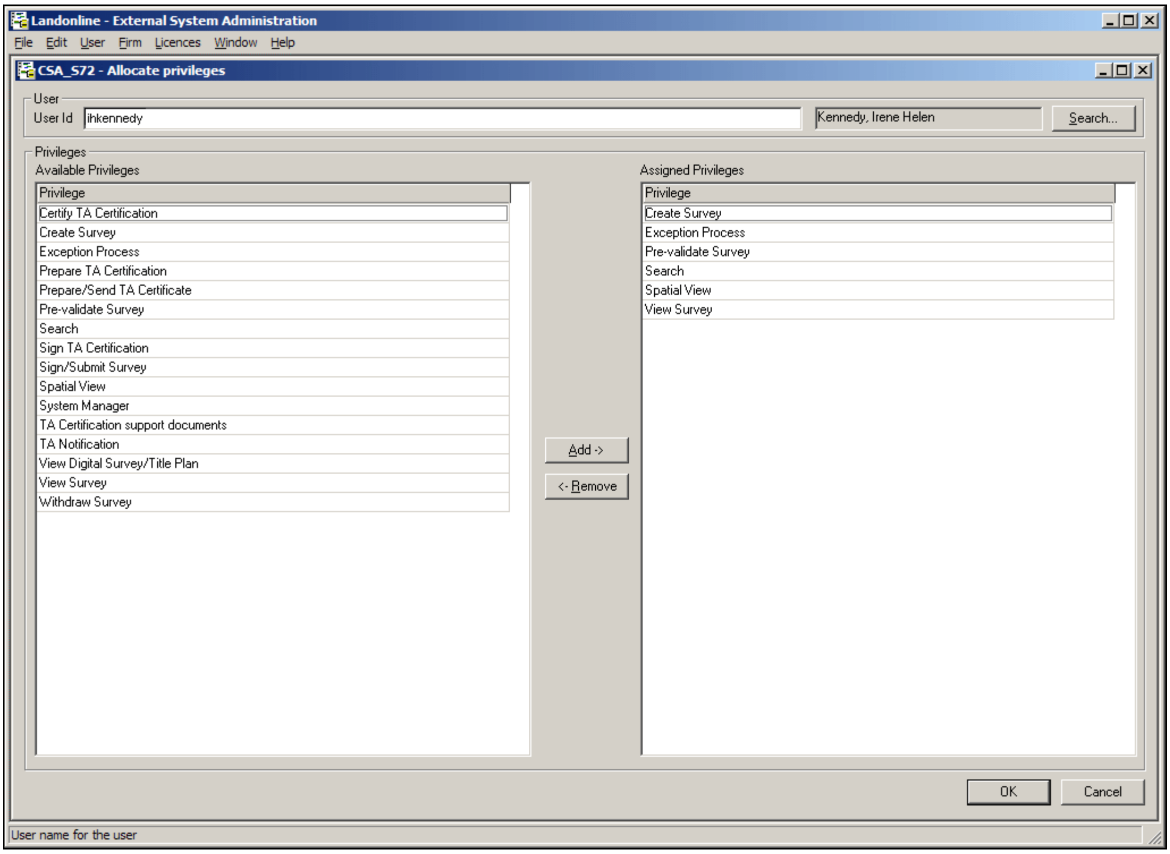


The System Manager has selected Irene Kennedy to perform some maintenance work on.

To display the user's privileges in the Allocate Privileges screen:

1. Select the Users tab in the Maintain Firm screen to display the users for the firm.
2. Select the user from the Associate Users list.
3. Click Privileges... to display the Allocate Privileges screen.

11.5.3 Allocate or remove privileges



Here you can see the privileges that have been allocate to Irene Kennedy.

11.5.3.1 Allocate privileges to a user

In the Allocate Privileges screen:

1. Select the required privileges from the Available Privileges list.
2. Click Add -> to copy the privileges to the Assigned Privileges list.
3. Click OK to save the changes and close the screen.

11.5.3.2 Remove privileges from a user

In the Allocate Privileges screen:

1. Select the required privileges from the Assigned Privileges list.
2. Click <- Remove to delete the privileges from the list.
3. Click OK to save the changes and close the screen.

11.6 Modify user groups

User groups are established by the System Manager. They contain groups of privileges and are used to assign the same privileges to multiple users. For example, a System Manager can establish a user group for Conveyancing Professionals within the firm.

Tasks:

To modify user groups System Managers:

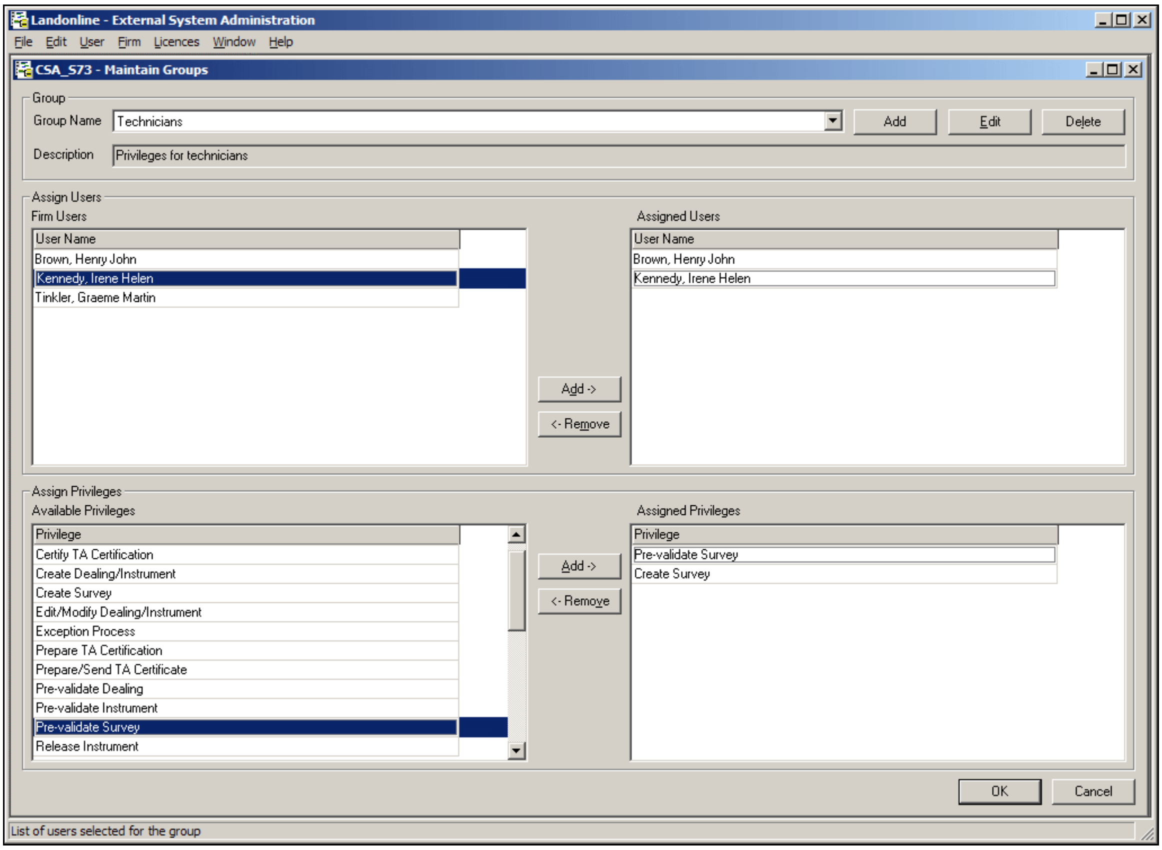
- Display the Maintain Groups screen.
- Create a new user group.
- Modify a group name or description.
- Assign users to, or remove users from, a group.
- Add privileges to, or remove privileges from, a group.
- Delete a group.

The following headings correspond with these tasks and describe them in more detail.

11.6.1 Display the Maintain Groups screen

The Maintain Groups screen is divided into three areas.

- The Group area is where the user group name and description are created and modified.
- The Assign Users area is where users are assigned to and removed from user groups.
- The Assign Privileges area is where privileges are assigned to, and removed from, a user group.



The System Manager is establishing some user groups for the users at Brown, Hill and Associates.

To display the Maintain Groups screen, in the Maintain Firm screen:

1. Click Maintain Groups...

11.6.2 Create a new user group

In the Maintain Groups screen:

1. Click Add to display the Maintain Group Name screen.
2. Type the name for the group in the Group Name field.
3. Type a description for the group in the Description field.
4. Click OK to save the new group and return to the Maintain Groups screen.

11.6.3 Modify a group name or description

In the Maintain Groups screen:

1. Select the group in the Group Name field.
2. Click Edit to open the Maintain Group name screen.
3. Modify the group name or description.
4. Click OK to save the change and return to the Maintain Groups screen.

11.6.4 Assign and remove users

11.6.4.1 Assign users to a group

In the Maintain Groups screen:

1. Select the Group in the Group Name field.
2. Select the user from the Firm list.
3. Click Add -> to copy the user to the Assigned Users list.
4. Save the changes.

11.6.4.2 Remove users from a group

In the Maintain Groups screen:

1. Select the Group in the Group Name field.
2. Select the user from the Assigned User list.
3. Click <- Remove to delete the user from the Assigned User list.
4. Save the changes.

Note: A user can be assigned to more than one group.

11.6.5 Add privileges to, or remove privileges from a group

11.6.5.1 Add privileges to a group

In the Maintain Groups screen:

1. Select the Group in the Group Name field.
2. Select the required privileges from the Available Privileges list.
3. Click Add -> to copy the privileges to the Assigned Privileges list.
4. Save the changes.

11.6.5.2 Remove privileges from a group

In the Maintain Groups screen:

1. Select the user group in the Group Name field.
2. Select the privileges to be removed from the Assigned Privileges list.
3. Click <- Remove to delete the privileges from the Assigned Privileges list.
4. Save the changes.

Note: When privileges are deleted from a user group, they are also deleted from all users in that user group.

11.6.6 Delete a user group

In the Maintain Groups screen:

1. Select the user group in the Group Name field.
2. Click Delete to delete the Group.
3. Save the changes.

Note: When you delete a group all users associated with that group lose the group privileges.

11.7 Disassociate a user from the firm

System Managers can disassociate a user from their firm if, for example, the user leaves the firm. When a user is disassociated they can no longer log on to Landonline from the firm and cannot perform work for that firm.

To disassociate a user, in the Maintain Firm screen:

1. Select the Users tab in the Maintain Firm screen.
2. Select the user to be disassociated from the Associated Users list.
3. Click Disassociate
4. Click OK to close the Maintain Firm screen and save the change.

Caution: Once you disassociate a user you cannot associate the user with the firm again. This can only be done by LINZ. The disassociated user’s work will still display in Workspace but can only be edited by someone with the same privileges.

11.8 Generate a Licence usage report

A System Manager can produce a report to show current and historic licence usage information within their firm.

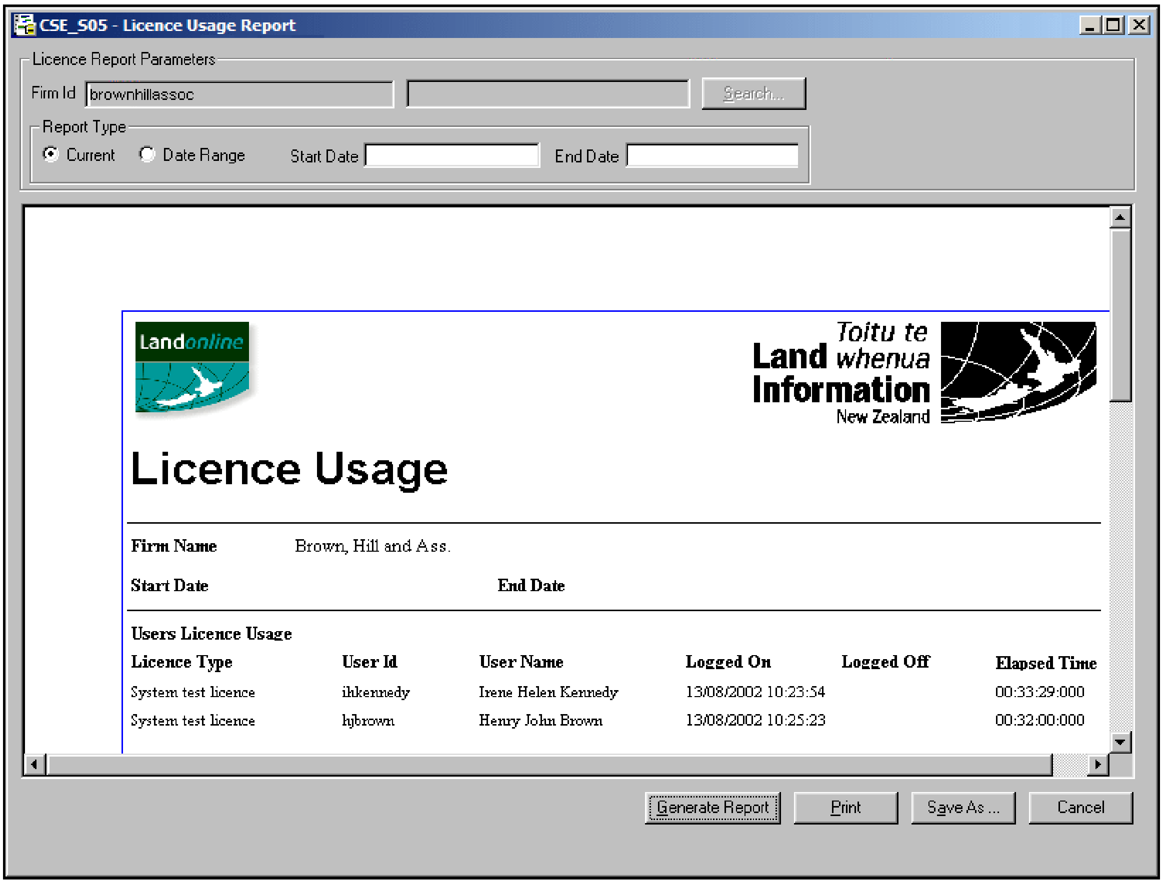
Tasks:

A System Manger can:

- Display the Licence Usage Report screen.
- Generate a Licence Usage Report.
- Print the Licence Usage Report.
- Save the Licence Usage Report to their computer.

The following headings correspond with these tasks and describe them in more detail.

11.8.1 Display the Licence Usage Report screen



This is a Licence Usage Report for Brown, Hill and Associates.

To display the Licence Usage Report screen, in the External System Administration screen:

1. Select Licence | Licence Report…

11.8.2 Generate a Licence Usage Report

In the Licence Usage Report screen:

1. Click Current or Date Range in the Report Type area.
2. If you selected Date Range type a Start Date and End Date to specify the period you want to generate the report for.
3. Click Generate Report...

11.8.3 Print the Licence Usage Report

In the Licence Usage Report screen:

1. Generate the Licence Usage Report.
2. Click Print

11.8.4 Save the Licence Usage Report

You can save the Licence Usage Report to your computer.

To save the Licence Usage Report, in the Licence Report screen:

1. Generate the Licence Usage Report.
2. Click Save As...
3. Select a location on your computer to save the file to.
4. Type a name for the file.
5. Select a file format for the report. (eg tif).
6. Click Save

11.9 System Management Toolkit

Table 11-1 lists other tools that assist a System Manager to maintain user security access levels to Landonline, and user and firm information.

Tool	Description
Landonline Help	Press F1 in to display Landonline Help in any System Management screen.
Quick Reference Cards	Section: System Management Topics: • Change firm details • Change firm details for a user • Change privileges • Create privilege groups • Generate usage report.

Table 11-1 System Management Toolkit