# 7 SYSTEM MANAGEMENT

## 7.1 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 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
- customise mortgagee quick codes for the firm.

**Note**: Individual users also access the Maintain User screen in External System Administration to update their own details. See **3.9 Change your details or password**.

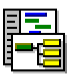
## 7.2 External System Administration screen

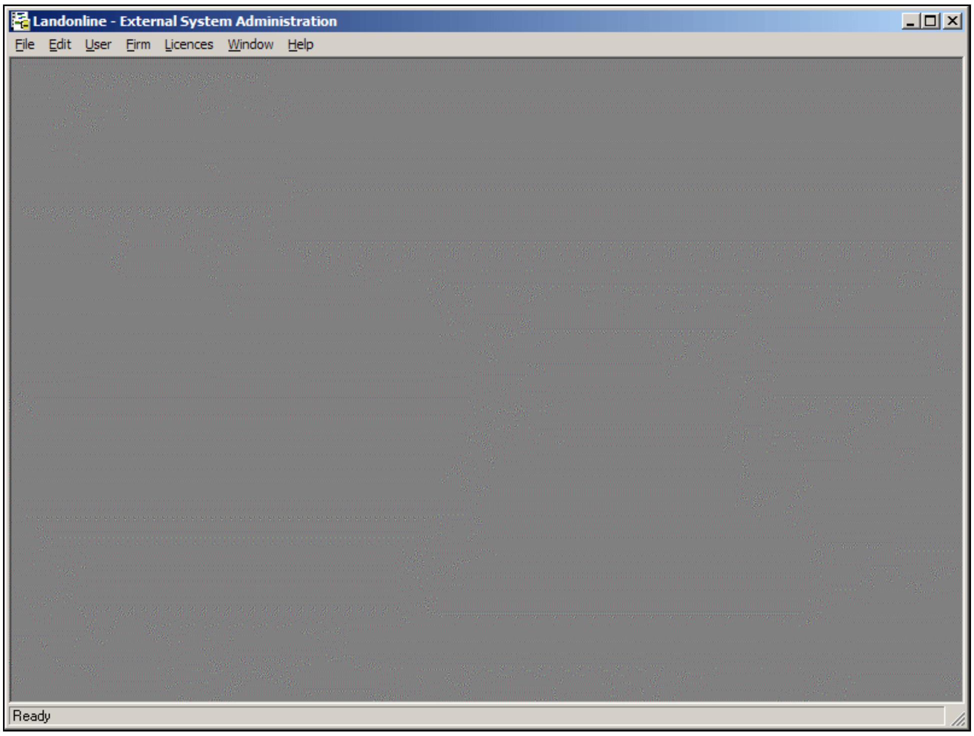
The External System Administration screen provides System Managers with access to the:

- 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.

Only System Managers can display the External System Administration screen.

In Workspace, to display the External System Administration screen:

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




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

## 7.3 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:

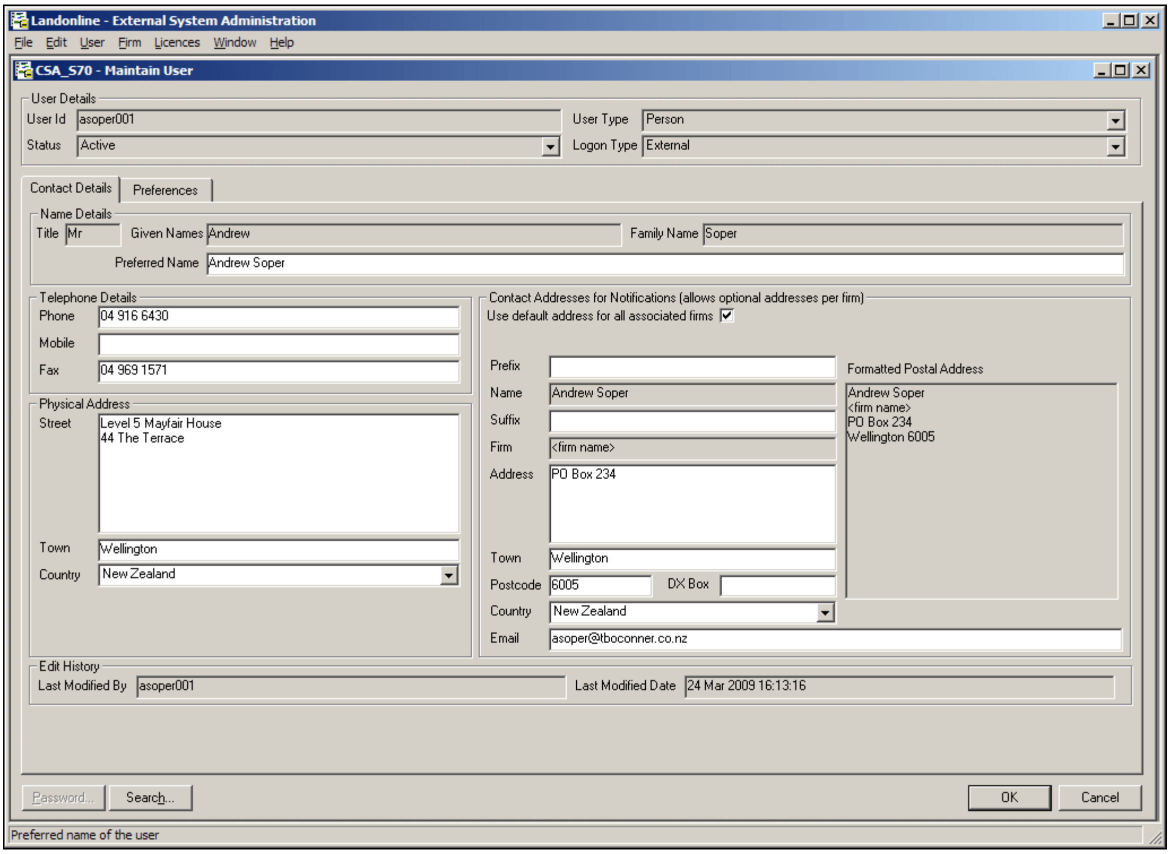
To view an individual user's details you:

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.

### 7.3.1 Display the Maintain User screen

To display the Maintain User screen, in External System Administration, select **User | Maintain User…**




When Andrew Soper, (the System Manager at Tarbottom O'Conner & Co) opens the Maintain User screen, it displays his user details. Andrew must search for a user to display their details.

### 7.3.2 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. The selected users contact details will display in the Contact Details tab and their preferences will display in the Preferences tab. These cannot be modified.

To search for the user:

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

### 7.3.3 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 **3.9.1 Change your details**.

## 7.4 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:

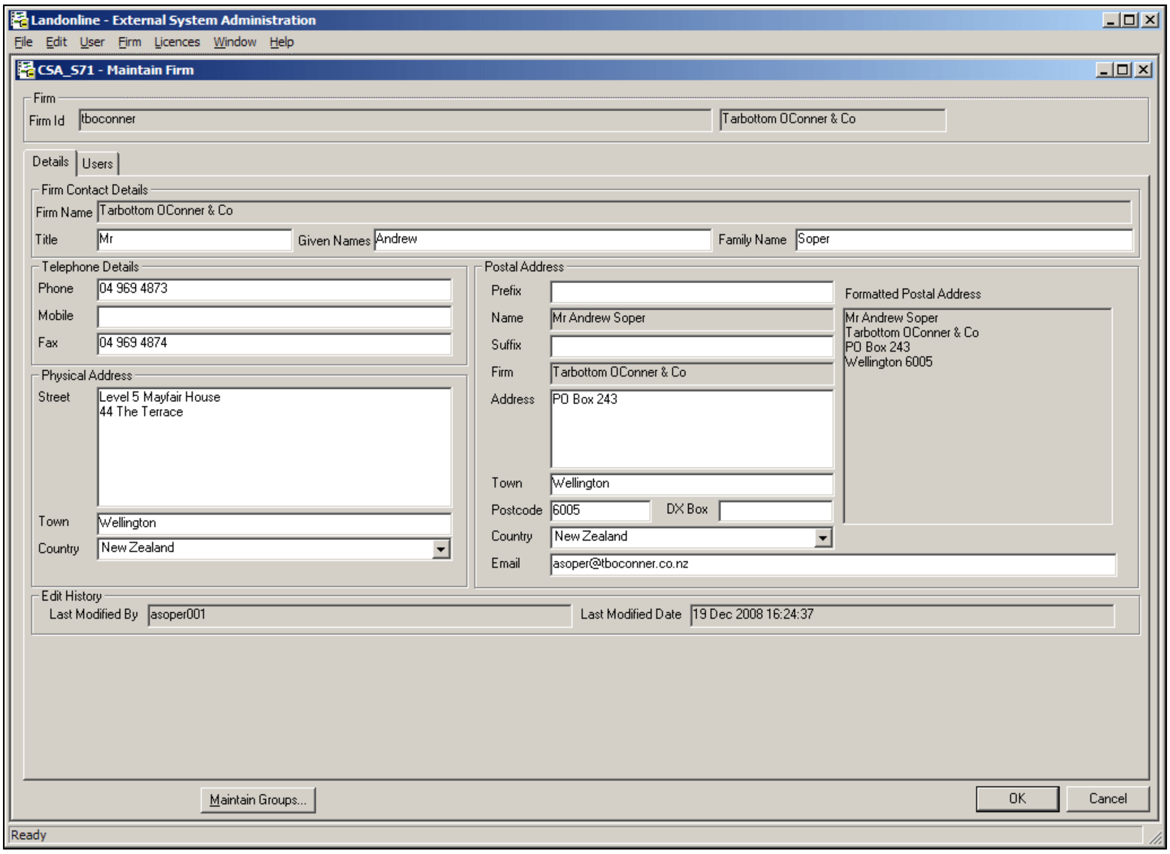
- Display the Maintain Firm screen.
- Modify the required details in the Details tab.
- Modify a user's details as they relate to a firm.

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

### 7.4.1 Display the Maintain Firm screen

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

To display the Maintain Firm screen, in External System Administration, select **Firm | Maintain Firm…**




The System Manager from Tarbottom, O'Connor and Co. has opened the Maintain Firm screen to update the address details for the firm.

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

**Note:** LINZ can generate a report showing who made changes to user details.

### 7.4.2 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 vertical bar (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**.

### 7.4.3 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 from the Associated Users list.
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.

## 7.5 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 and sign an instrument). The System Manager allocates appropriate privileges to each user based on their role (eg, Searches, Primary Contact, Conveyancing Professional).

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, a user could not be assigned the privileges required to search.

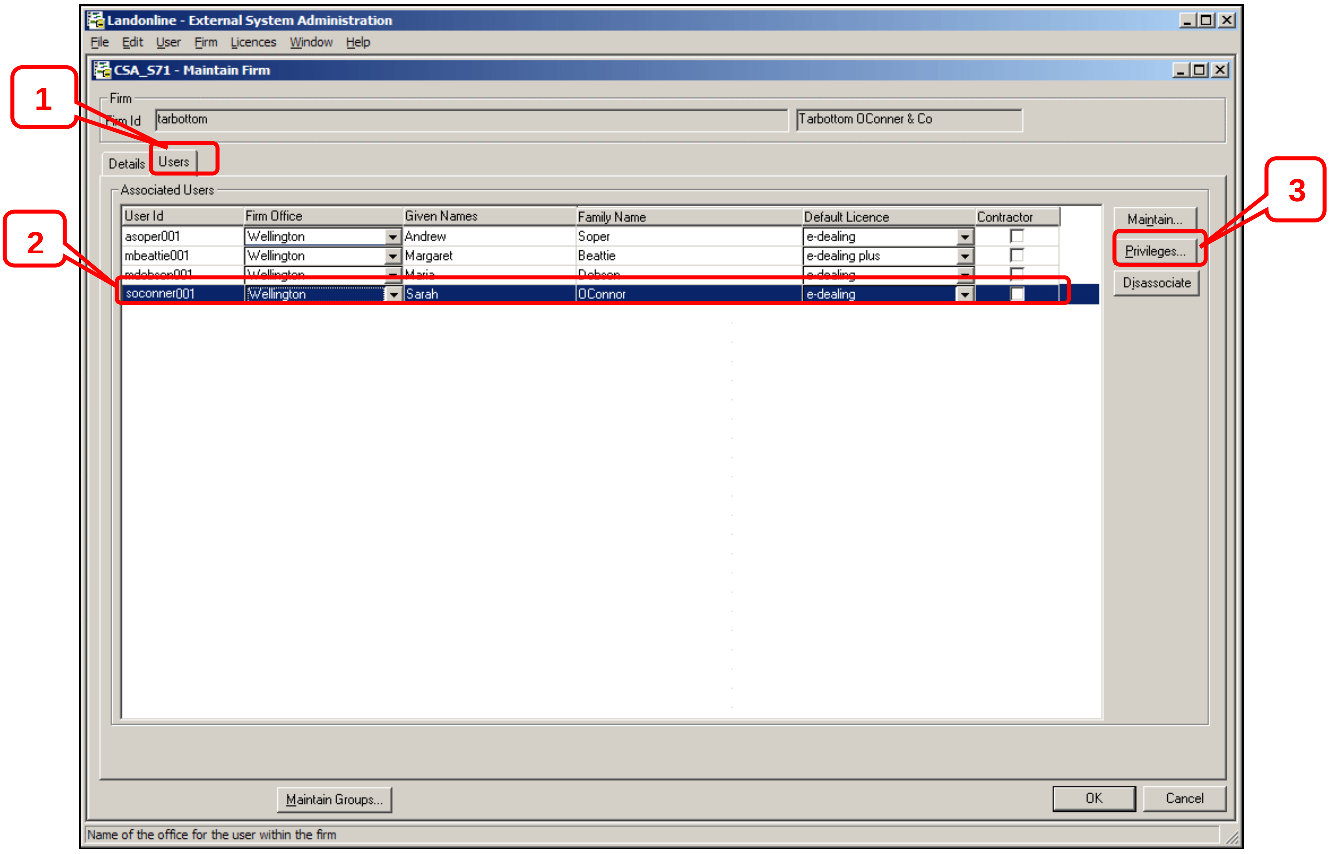
Steps:

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.

### 7.5.1 Display the Allocate Privileges screen

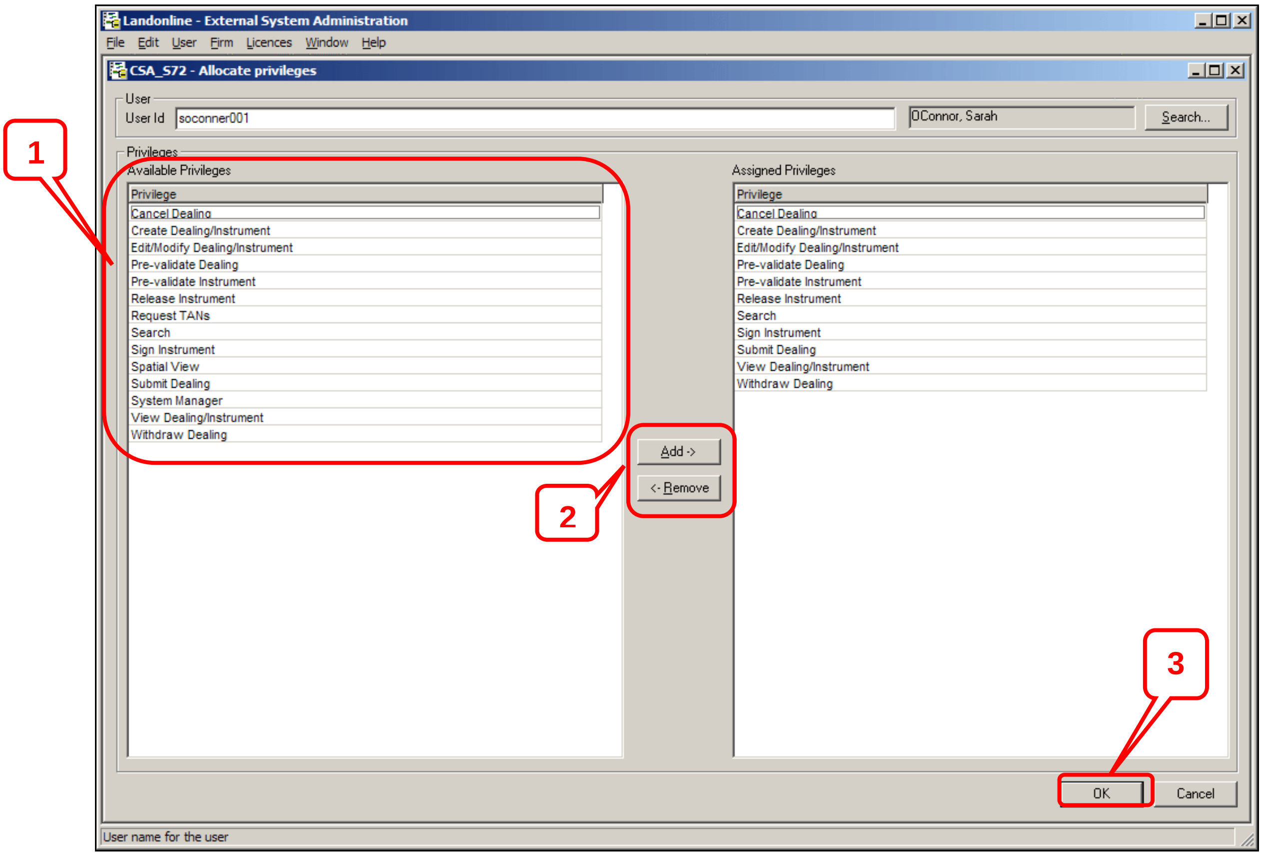



The System Manager has selected Sarah O’Connor to perform some maintenance work on.

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 Associated Users list.
3. Click Privileges... to display the Allocate Privileges screen.

### 7.5.2 Allocate or remove privileges




You can view the privileges that have been allocated to Sarah O'Connor.

To allocate privileges to a user

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.

To remove privileges from a user

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.

## 7.6 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.

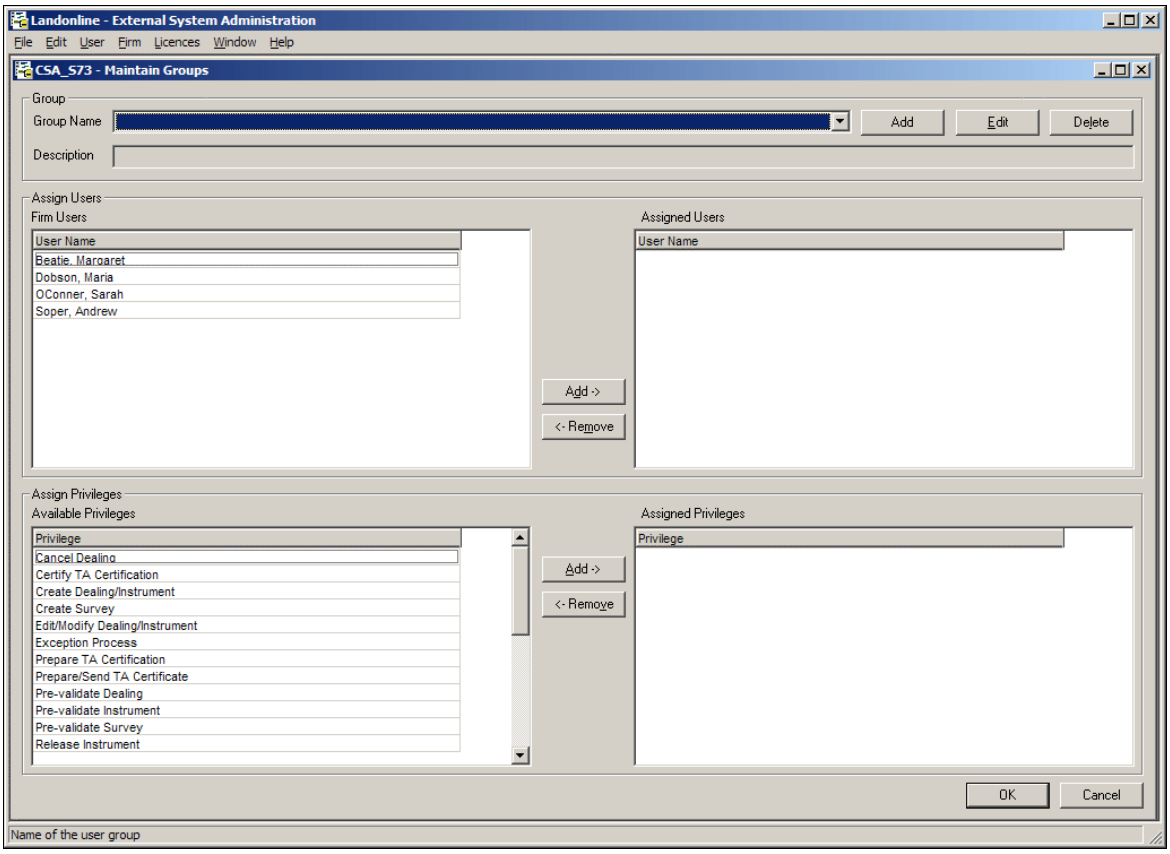
### 7.6.1 Display the Maintain Groups screen

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.

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

1. Click Maintain Groups...




The System Manager is about to establish some user groups for the users at Tarbottom, O'Connor and Co.

## 7.6.2 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.

## 7.6.3 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.

## 7.6.4 Assign and remove users

To assign users to a group:

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.

To remove users from a group:

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.

### 7.6.5 Add or remove privileges from a group

To add privileges to a group:

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.

To remove privileges from a group:

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.

### 7.6.6 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. Click **Yes** to save your changes.

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

## 7.7 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.

**Note:** Before you disassociate a user from your firm, you should reassign all work in Workspace for that user, including any Requests. You cannot disassociate a user from a firm while they still have work assigned to them.

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 

4. Click 

to save the changes and close the Maintain Firm screen.

**Caution**: Once you disassociate a user you cannot associate the user with the firm again. This can only be done by a LINZ System Administrator. The disassociated user's work will still display in Workspace.

## 7.8 Maintain firm mortgagee quick codes

A System Manager can customise any mortgagee quick code to suit their firm using the Maintain Firm Mortgagee Quick Codes screen. They can also add a new quick code for a mortgagee that does not display in the LINZ Quick Codes list.

Once you create and save mortgagee quick codes for your firm, the next time a user in your firm opens the Prepare Mortgage screen, these codes will display at the top of the list in the Quick Code field.

Your Firm Quick Codes list can contain duplicates of the LINZ Quick Codes. The list you create is unique to your firm.

Tasks:

A System Manger can:

- Display the Maintain Firm Mortgagee Quick Codes screen.
- Copy an existing LINZ quick code to your firm list.
- Add a new firm mortgagee quick code.
- Print, copy or save your Firm Quick Codes list.

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

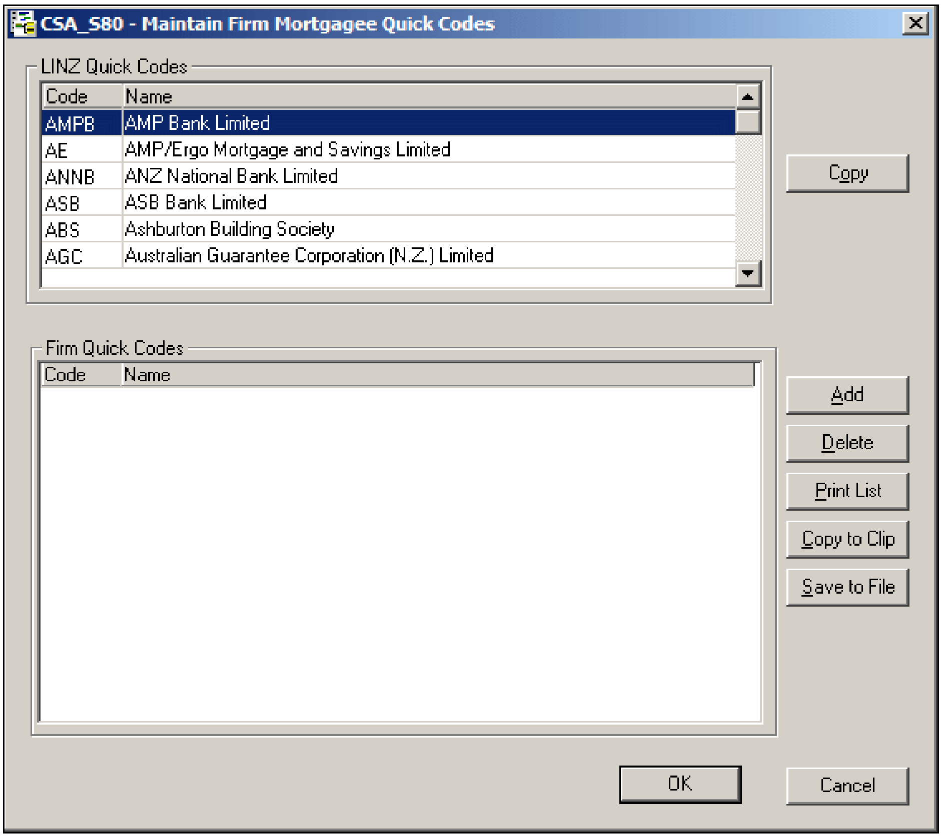
### 7.8.1 Display the Maintain Firm Mortgagee Quick Codes screen

The Maintain Firm Mortgagee Quick Codes screen is divided into two areas.

- The LINZ Quick Codes area displays a list of all existing LINZ mortgagee quick codes for you to select to copy to the Firm Quick Code area (if appropriate).
- The Firm Quick Code area is where you customise each mortgagee quick code to suit your firm or add a new mortgagee quick code for a one that does not display in the LINZ Quick Codes list.

To display the Maintain Groups screen, in the System Management:

1. Select Maintain | Maintain Mortgagee Quick Codes…




### 7.8.2 Copy an existing LINZ quick code to your firm list

You can copy one or more existing LINZ quick codes to customise for your firm.

In the Maintain Mortgagee Quick Codes screen:

1. Select a mortgagee quick code in the LINZ Quick Codes area.
2. Click 

to copy the selected mortgagee quick code to the Firm Quick Codes area.
3. In the Firm Quick Codes area:
   - Amend the code in the Code field (if required) to customise it for your firm.
   - Amend the mortgagee name in the Name field (if required).

- If you choose not to change any details of a copied mortgagee quick code a warning message displays, but you can continue.

4. To delete a mortgagee quick code from the Firm Quick Codes area, select it and click Delete. (There is no restriction on deleting your Firm Quick Codes.)
5. Click OK to save and close the screen.

**Note:** The Quick Code must be unique to each mortgagee.

### 7.8.3 Add a new firm mortgagee quick code

In the Maintain Firm Mortgagee Quick Codes screen:

1. Click Add to add a blank row in the Firm Quick Codes area.
2. Enter the quick code in the Code field.
3. Enter the name of the Mortgagee in the Name field.
4. To delete a mortgagee quick code from the Firm Quick Codes area, select it and click Delete.
5. Click OK to save and close the screen.

**Note:** Check your spelling is correct before saving, especially if the mortgagee is linked to a restricted Memorandum Number. The Quick Code must be unique to each mortgagee.

### 7.8.4 Print, copy or save your Firm Quick Codes list

You can print a list of your customised firm quick codes, copy them to the clipboard to paste elsewhere, or save them to a file on your computer. This functionality is similar to printing, copying and saving a list of search results in **Searches**.

In the Maintain Firm Mortgagee Quick Codes screen:

1. Perform one of the following actions to print, copy or save your list of Firm Quick Codes:
   - Click Print List to print the list displayed.
   - Click Copy to Clip to copy the list displayed to the clipboard to paste elsewhere outside Landonline (eg to MS Word, MS Excel, etc).
   - Click Save to File to save the list displayed to a file on your computer.
2. Click OK to save and close the screen.

## 7.9 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:

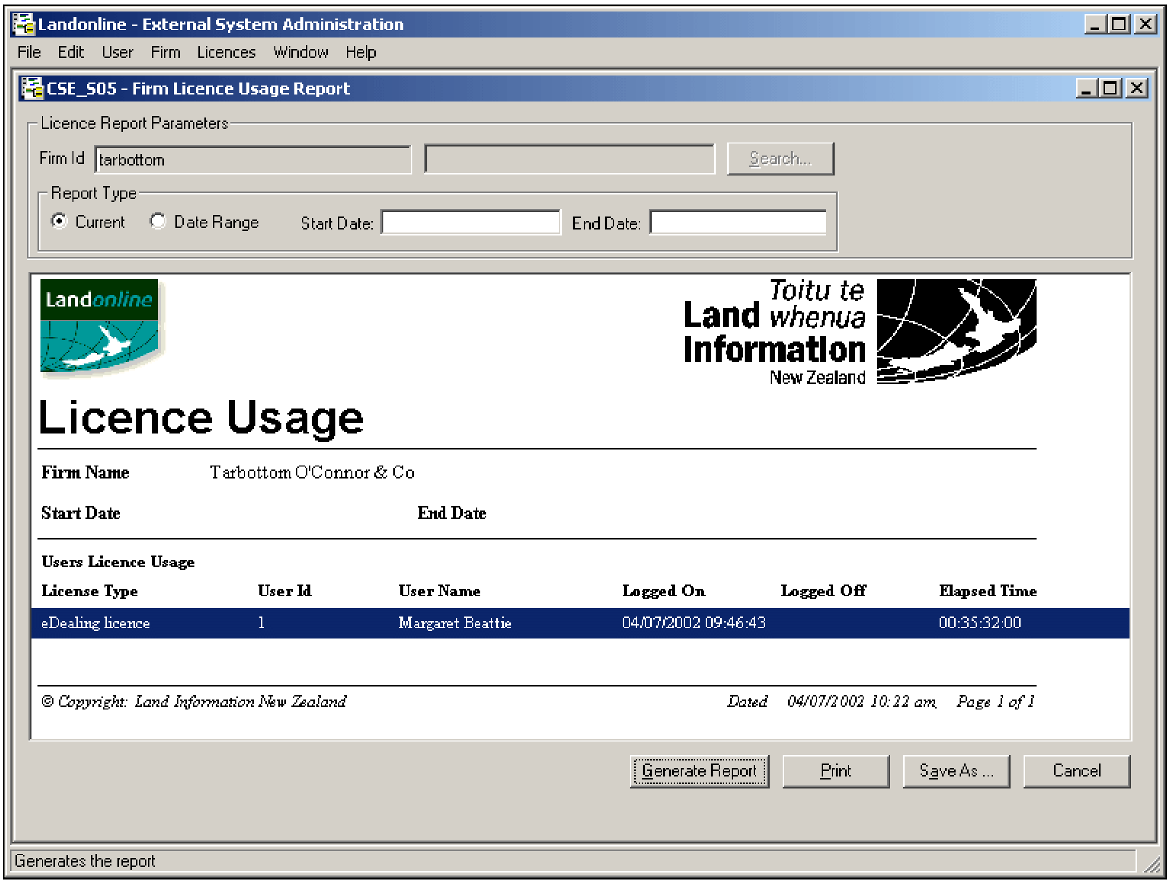
- Display the Licence Usage Report screen.

- 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.

### 7.9.1 Display the Licence Usage Report screen

To display the Licence Usage Report screen, in the External System Administration screen, select **Licence | Licence Report…**




This is a Licence Usage Report for Tarbottom, O'Connor and Co.

### 7.9.2 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 


### 7.9.3 Print the Licence Usage Report

In the Licence Usage Report screen:

1. Generate the Licence Usage Report.
2. Click 

### 7.9.4 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.
4. Type a name for the file.
5. Select a file format for the report (eg tif).
6. Click Save

## 7.10 System Management Toolkit

**Table 7-1** lists other tools that assist a System Manager to maintain user security access levels to Landonline, and user and firm information.

| Tool | Description |
|---|---|
| Quick Reference Cards | Section: System Management.<br>Topics:<br>• Change firm details.<br>• Change firm details for a user.<br>• Change a user's privileges.<br>• Create privilege groups.<br>• Generate a Licence Usage report.<br>• Maintain Firm Quick Codes. |

**Table 7-1 System Management Toolkit resources**