

The LS/CMI system

Guide for Business Administrators

This guide relates to Version 5.1 of the LS/CMI system.

April 2018

Version Control

| Version | Description | Date | Produced by |
|---------|---|-----------|--------------|
| 0.1 | First draft | 14/10/16 | Ian McIntosh |
| 0.2 | Amended following review of draft by Julie McDonald | 24/10/16 | Ian McIntosh |
| 1.0 | 1 st published version | 27/10/16 | Ian McIntosh |
| 2.0 | Updated for V5.1 of the system | 20/ 04/18 | Ian McIntosh |

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Introduction

This guide illustrates key tasks that Business Administrators are likely to undertake whilst using the LS/CMI system.

Anybody assigned to the **Business Admin** user group would usually have access rights which would allow them to:

- Add users to the system
- Amend users details
- Change the group a user is assigned to
- Remove users from the system
- Unlock accounts and reset passwords
- Add/ amend/ delete user groups
- Produce system reports

However, access to the system can be tailored by services, if required, by creating a new user group and assigning some staff to that new group.

Therefore, Business Administrators might be able to do more than the tasks set out within this guide – depending upon local decisions about their role and responsibilities.

The User Table: a brief overview

Dashboard
New Case
Administration

Document Library

Dashboard

| Open Tasks | | | | | System Case | | |
|------------|------|-------------|----------------|------------------------------|-------------|--------------|----------|
| | Case | Urn | Offender Name | Stage | Case | Urn | Off |
| Continue | 91 | S666777/23E | O'Shanter, Tam | Full Assess LS/CMI 1 to 8 | 97 | S000005/13\$ | Engineer |
| | | | | | 96 | S000005/13\$ | Engineer |

On Dashboard,
click
[Administration...](#)

DashboardNew CaseAdministration

Welcome Ian McIntosh

UsersAdd UserUser GroupsGroupsAdd GroupSystem PermissionsSystem AuditSystem Reports

Users

| | | | | ID | User Name | Title | Forename | Surname | Email | | | | |
|------|--------|----------------|-------------|----|-----------|---------|----------|----------|--------------------------------------|--|--|---------------------|--|
| Edit | Delete | Reset Password | User Groups | 1 | CManager | Case | Manager | | cmanager@training.com | | | 07/01/2016 15:12:46 | |
| Edit | Delete | Reset Password | User Groups | 3 | JJones | Jayne | Jones | | aa@il.com | | | 14/08/2015 09:00:01 | |
| Edit | Delete | Reset Password | User Groups | 4 | Ian | | Ian | McIntosh | ian.mc@training.com | | | 11/10/2016 11:48:08 | |
| Edit | Delete | Reset Password | User Groups | 5 | LKerr | Les | Kerr | | le@k.com | | | 02/03/2016 09:09:41 | |
| Edit | Delete | Reset Password | User Groups | 6 | JBlog | John | Bloggs | | jj@jj.com | | | 10/08/2015 14:23:56 | |
| Edit | Delete | Reset Password | User Groups | 7 | training1 | Trainer | One | | tt@jj.com | | | 15/04/2016 14:12:07 | |
| Edit | Delete | Reset Password | User Groups | 8 | training2 | Trainer | Two | | hh@c.com | | | | |
| Edit | Delete | Reset Password | User Groups | 9 | training3 | Trainer | Three | | jj@jj.com | | | | |
| Edit | Delete | Reset Password | User Groups | 10 | training4 | Trainer | Four | | uu@h.com | | | | |
| Edit | Delete | Reset Password | User Groups | 11 | training5 | Trainer | Five | | kk@c.com | | | | |
| Edit | Delete | Reset Password | User Groups | 12 | Julie | Julie | McDonald | | julie@training.com | | | 05/10/2016 09:10:54 | |
| Edit | Delete | Reset Password | User Groups | 16 | ogradey | James | O'Grady | | jogradey@training.com | | | 16/12/2015 09:23:02 | |
| Edit | Delete | Reset Password | User Groups | 19 | Mark | Mark | McSherry | | mark.mcsherry@RMAScotland.gsi.gov.uk | | | 17/08/2016 14:43:15 | |
| Edit | Delete | Reset Password | User Groups | 20 | TL | | Ian | McIntosh | lmcTL@training.com | | | 14/09/2016 13:52:39 | |

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...to view details
of any user of the
system

Information can be sorted by clicking on any column heading which is underlined (for example, users can be sorted alphabetically by clicking on Forename or Surname)

Dashboard

New Case

Administration

Users

Add User

User Groups

Groups

Add Group

System Permissions

System Audit

Users

| | ID | User Name | Title | Forename | Surname | Email | Phone | Prison | Last Login | Locked |
|--|----|-----------|-------|----------|----------|-----------------------|-------|--------|---------------------|-------------------------------------|
| Edit Delete Reset Password User Groups | 1 | CManager | | Case | Manager | cmanager@training.com | | | 07/01/2016 15:12:46 | <input type="checkbox"/> |
| Edit Delete Reset Password User Groups | 3 | JJones | | Jayne | Jones | aa@il.com | | | 14/08/2015 09:00:01 | <input checked="" type="checkbox"/> |
| Edit Delete Reset Password User Groups | 4 | Ian | | Ian | McIntosh | ian.mc@training.com | | | 11/10/2016 11:48:08 | <input type="checkbox"/> |
| Edit Delete Reset Password User Groups | 5 | LKerr | | Les | Kerr | le@k.com | | | 02/03/2016 09:09:41 | <input type="checkbox"/> |

1

234

4

The number of lines displayed on the table

The number of lines displayed on the table can be increased or decreased by using this drop down

A variety of other administrative functions are available via these menu options...

Dashboard

New Case

Administration

Welcome Ian McIntosh

Users

Add User

User Groups

Groups

Add Group

System Permissions

System Audit

System Reports

Users

| | | | | ID | User Name | Title | Forename | Surname | Email | Phone | Prison | Last Login | Locked |
|----------------------|------------------------|--------------------------------|-----------------------------|----|-----------|-------|----------|----------|--|-------|--------|---------------------|-------------------------------------|
| Edit | Delete | Reset Password | User Groups | 1 | CManager | | Case | Manager | cmanager@training.com | | | 07/01/2016 15:12:46 | <input type="checkbox"/> |
| Edit | Delete | Reset Password | User Groups | 3 | JJones | | Jayne | Jones | aa@il.com | | | 14/08/2015 09:00:01 | <input checked="" type="checkbox"/> |
| Edit | Delete | Reset Password | User Groups | 4 | Ian | | Ian | McIntosh | ian.mc@training.com | | | 11/10/2016 11:48:08 | <input type="checkbox"/> |
| Edit | Delete | Reset Password | User Groups | 5 | LKerr | | Les | Kerr | lk@k.com | | | 02/03/2016 09:09:41 | <input type="checkbox"/> |

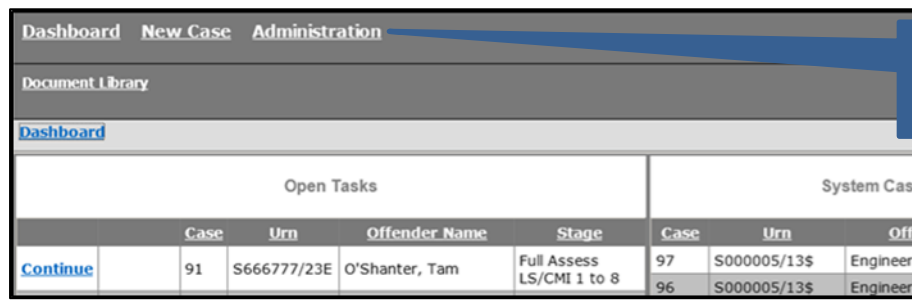
1

23

4

...and these links

Adding a new user



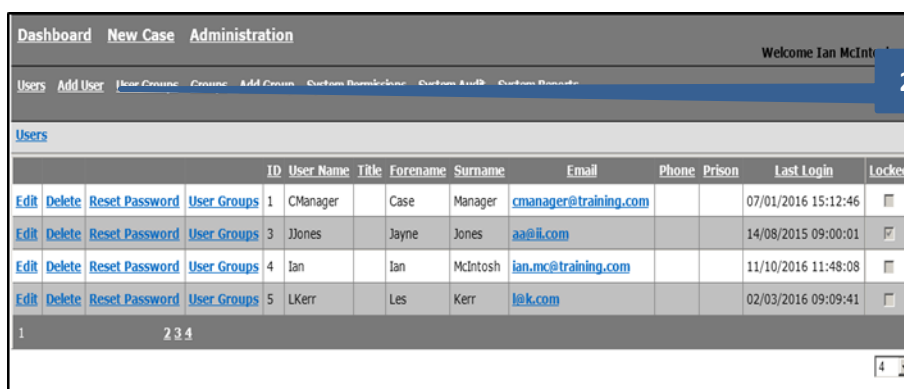
Dashboard New Case Administration

Document Library

Dashboard

| Open Tasks | | | | | System Case | | |
|--------------------------|------|-------------|----------------|------------------------------|-------------|--------------|-----------|
| | Case | Urn | Offender Name | Stage | Case | Urn | Offe |
| Continue | 91 | S666777/23E | O'Shanter, Tam | Full Assess LS/CM1 1 to 8 | 97 | S000005/13\$ | Engineer, |
| | | | | | 96 | S000005/13\$ | Engineer, |

1. On Dashboard, click Administration



Dashboard New Case Administration

Welcome Ian McIntosh

Users Add User User Groups Groups Add Group Custom Permissions Custom Fields Custom Reports

Users

| | ID | User Name | Title | Forename | Surname | Email | Phone | Prison | Last Login | Locked |
|--|----|-----------|-------|----------|---------|--|-------|--------|---------------------|-------------------------------------|
| Edit Delete Reset Password User Groups | 1 | CManager | Case | Manager | | cmanager@training.com | | | 07/01/2016 15:12:46 | <input type="checkbox"/> |
| Edit Delete Reset Password User Groups | 3 | JJones | Jayne | Jones | | aa@il.com | | | 14/08/2015 09:00:01 | <input checked="" type="checkbox"/> |
| Edit Delete Reset Password User Groups | 4 | Ian | Ian | McIntosh | | ian.mc@training.com | | | 11/10/2016 11:48:08 | <input type="checkbox"/> |
| Edit Delete Reset Password User Groups | 5 | LKerr | Les | Kerr | | l@k.com | | | 02/03/2016 09:09:41 | <input type="checkbox"/> |

1 2 3 4

2. Click on Add User



Add User

User Name:

Title:

Forename:

Surname:

Email:

Phone Number:

Password:

User Group:

Select Prison:

3. Complete all mandatory fields (User Name; Forename, Surname, Email)

Greyed out fields are optional

The password field will be completed automatically by the system

Add User

User Name:

Title:

Forename:

Surname:

Email:

Phone Number:

Password:

User Group:

Select Prison:

4. Use the drop down list to select which *User Group* the user is to be assigned to

Add User

User Name:

Title:

Forename:

Surname:

Email:

Phone Number:

Password:

User Group:

Select Prison:

5. FOR PRISON BASED USERS ONLY: Use the drop down list to select which prison the user is based in

Add User

User Name:

Title:

Forename:

Surname:

Email:

Phone Number:

Password:

User Group:

Select Prison:

6. Click on *Add*

Add User

User Name:

Title:

Forename:

Surname:

Email:

Phone Number:

Password:

User Group:


Select Prison:

[Saved Ian McIntosh](#) [Email User](#)

*User
successfully
added to
the system*

7. If required,
click on this link
to email & advise
the user they
have been added
to the system

Amending User Details



1. On Dashboard, click Administration

2. Click on Edit and make any required changes

| Username | Title | Forename | Surname | Email | Phone | Prison | Last Login | Locked |
|--|-------|----------|---------|----------|--|--------|---------------------|-------------------------------------|
| Edit Delete Reset Password User Groups | 1 | CManager | Case | Manager | cmanager@training.com | | 07/01/2016 15:12:46 | <input type="checkbox"/> |
| Edit Delete Reset Password User Groups | 3 | JJones | Jayne | Jones | aa@ll.com | | 14/08/2015 09:00:01 | <input checked="" type="checkbox"/> |
| Edit Delete Reset Password User Groups | 4 | Ian | Ian | McIntosh | ian.mc@training.com | | 11/10/2016 11:48:08 | <input type="checkbox"/> |
| Edit Delete Reset Password User Groups | 5 | LKerr | Les | Kerr | l@k.com | | 02/03/2016 09:09:41 | <input type="checkbox"/> |

Dashboard **New Case** **Administration**

Users **Add User** **User Groups** **Groups** **Add Group** **System Permissions** **System Audit** **System Reports**

Users

| | | ID | User Name | Title | Forename |
|---|------------------------|--------------------------------|-----------------------------|-------|----------|
| Update Cancel | Delete | Reset Password | User Groups | 1 | CManager |
| Edit | Delete | Reset Password | User Groups | 3 | JJones |
| Edit | Delete | Reset Password | User Groups | 4 | Ian |

3. Save any changes by clicking on Update

Assigning a user to a different group

| | | |
|------------------|--------------|---------------------------|
| Dashboard | New Case | Administration |
| Document Library | | |
| Dashboard | | |
| Open Tasks | | System Case |
| Case | Urn | Offender Name |
| Continue | 91 | S666777/23E |
| | | O'Shanter, Tam |
| | | Full Assess LS/CMI 1 to 8 |
| Case | Urn | Offe |
| 97 | S000005/13\$ | Engineer, |
| 96 | S000005/13\$ | Engineer, |

1. On Dashboard, click Administration

Dashboard

New Case

Administration

Welcome Ian McIntosh

2

Users

Add User

User Groups

Case

Users

| | | | | ID | User Name | Title | Forename | Surname | Email | Phone | Prison | Last Login | Locked |
|------|--------|----------------|-------------|----|-----------|-------|----------|----------|-----------------------|-------|--------|---------------------|-------------------------------------|
| Edit | Delete | Reset Password | User Groups | 1 | CManager | | Case | Manager | cmanager@training.com | | | 07/01/2016 15:12:46 | <input type="checkbox"/> |
| Edit | Delete | Reset Password | User Groups | 3 | JJones | | Jayne | Jones | aa@il.com | | | 14/08/2015 09:00:01 | <input checked="" type="checkbox"/> |
| Edit | Delete | Reset Password | User Groups | 4 | Ian | | Ian | McIntosh | ian.mc@training.com | | | 11/10/2016 11:48:08 | <input type="checkbox"/> |
| Edit | Delete | Reset Password | User Groups | 5 | LKerr | | Les | Kerr | lk@k.com | | | 02/03/2016 09:09:41 | <input type="checkbox"/> |

1

2

3

4

4

Dashboard New Case Administration Welcome Ian McIntosh

Users Add User User Groups Groups Add Group System Permissions System Audit System Reports

Users > User Groups

Select User: 3: Jayne Jones

| | ID | Group Name | Assign |
|------------------------------------|----|---------------------------|-------------------------------------|
| System Permissions | 1 | Clinical User | <input type="checkbox"/> |
| System Permissions | 2 | Team Leader | <input checked="" type="checkbox"/> |
| System Permissions | 3 | Business Admin | <input type="checkbox"/> |
| System Permissions | 4 | Case Management Access | <input type="checkbox"/> |
| System Permissions | 5 | Read Only Service Manager | <input type="checkbox"/> |
| System Permissions | 6 | IT Admin | <input type="checkbox"/> |
| System Permissions | 7 | Maintenance | <input type="checkbox"/> |
| System Permissions | 8 | Cale Only | <input type="checkbox"/> |
| System Permissions | 9 | MFMC Only | <input type="checkbox"/> |
| System Permissions | 11 | New One | <input type="checkbox"/> |

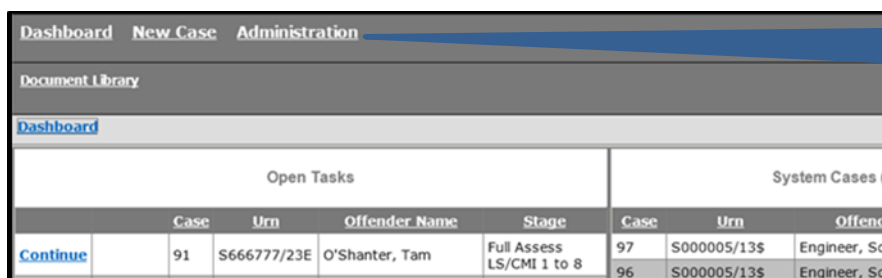
1 2 10

3. Click to tick (✓) to reassign user to the required group (in this example, Jayne Jones is now assigned to the Team Leader group)

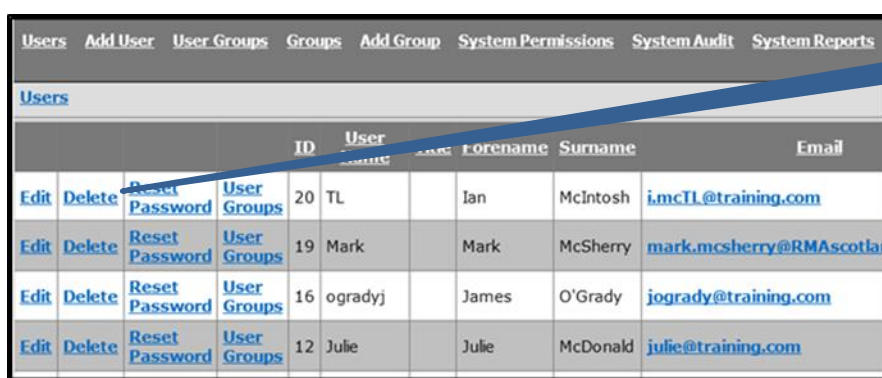
NOTE:

- A user can only be assigned to one group at a time.
- If a user needs to have access rights drawn from mixture of user groups, adding a new user group is recommended (see page 17).

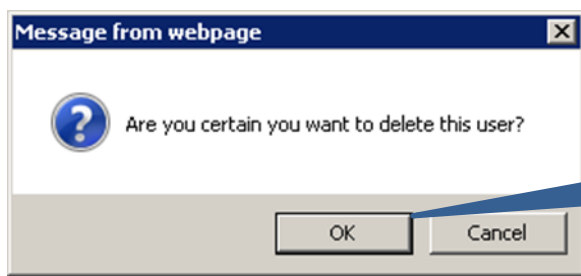
Deleting a user



1. On Dashboard, click Administration



2. Click on Delete



3. A warning message will pop up. Click on OK to proceed with deletion

NOTE:

If the user still has cases assigned to them, the system will generate the following message:
Error: Cannot delete user as they have LSCMI cases assigned to them. If this situation arises:

- Log back in and manually lock the user out of the system (see page 13)
- A Team Leader will need to reassign or close the cases still assigned to the user
- Once the user has no cases assigned to them, proceed with deletion

Locking accounts

Manually locking an account may be required in circumstances where a user has left the service but it is not yet possible to delete them from the system (because the user still has cases assigned to them on the system).

| | | |
|------------------|--------------|---------------------------|
| Dashboard | New Case | Administration |
| Document Library | | |
| Dashboard | | |
| Open Tasks | | |
| Case | Urn | Offender Name |
| Continue | 91 | S666777/23E |
| | | O'Shanter, Tam |
| | | Full Assess LS/CMI 1 to 8 |
| Case | Urn | Offend |
| 97 | S000005/13\$ | Engineer, Sc |
| 96 | S000005/13\$ | Engineer, Sc |

1. On Dashboard, click Administration

| | | |
|--------------|----------------|-----------------------|
| Dashboard | New Case | Administration |
| Users | Add User | User Groups |
| Groups | Add Group | System Permissions |
| System Audit | System Reports | |
| Users | | |
| | Name | Title |
| | Forename | Surname |
| | Email | |
| Edit | Delete | Reset Password |
| User Groups | 1 | CManager |
| | | Case |
| | | Manager |
| | | cmanager@training.com |
| Edit | Delete | Reset Password |
| User Groups | 3 | Jones |
| | | Jayne |
| | | Jones |
| | | aa@il.com |

2. Click on Edit

| | | | | | | |
|-------|----------|--------------------------------------|--|--|---------------------|--|
| Julie | McDonald | julie@training.com | | | 05/10/2016 09:10:54 | |
| James | O'Grady | jogrady@training.com | | | 16/12/2015 09:23:02 | |
| Mark | McSherry | mark.mcsherry@RMAScotland.gsi.gov.uk | | | 17/08/2016 14:43:15 | |
| Ian | McIntosh | ImcTI@training.com | | | 14/09/2016 13:52:39 | |
| 14 | | | | | | |

3. Use scroll bar at foot of the table to scroll to far right hand side

| Title | Forename | Surname | Email | Phone | Prison | Last Login | Locked |
|-------|----------|----------|-----------------------|-------|--------|---------------------|-------------------------------------|
| | Case | Manager | cmanager@training.com | | | 07/01/2016 15:12:46 | |
| | Jayne | Jones | aa@il.com | | | 14/08/2015 09:00:01 | <input checked="" type="checkbox"/> |
| | Ian | McIntosh | ian.mc@training.com | | | 12/10/2016 14:25:23 | |
| | Les | Kerr | le@k.com | | | 02/03/2016 09:09:41 | |
| | John | Blane | john@blane.com | | | 10/08/2015 | |

4. Click in box to tick [✓]

| | | | | | | | | | |
|------|--------|----------------|-------------|----|---------|--|-------|----------|------------------------------|
| Edit | Delete | Reset Password | User Groups | 12 | Julie | | Julie | McDonald | julie@training.com |
| Edit | Delete | Reset Password | User Groups | 16 | ogradyj | | James | O'Grady | jogrady@training.com |
| Edit | Delete | Reset Password | User Groups | 19 | Mark | | Mark | McSherry | mark.mcsherry@RMScotland.gsi |
| Edit | Delete | Reset Password | User Groups | 20 | TL | | Ian | McIntosh | lmCTL@training.com |

5. Use scroll bar to scroll back to the far left hand side of table

| | | | | ID | User Name | Title | Forename | Surname |
|--------|--------|----------------|----------------|----|-----------|-------|----------|----------|
| Edit | Delete | Reset Password | User Groups | 1 | CManager | | Case | |
| Update | Cancel | Delete | Reset Password | 3 | JJones | | Jayne | Jones |
| Edit | Delete | Reset Password | User Groups | 4 | Ian | | Ian | McIntosh |
| Edit | Delete | Reset Password | User Groups | 5 | I Kerr | | Ian | Kerr |

6. Click on Update

Unlocking accounts/ resetting passwords

| | | |
|------------------|---------------|----------------------------|
| Dashboard | New Case | Administration |
| Document Library | | |
| Dashboard | | |
| Open Tasks | | |
| System Cases | | |
| Case | Urn | Offender Name |
| Continue | 91 | S666777/23E O'Shanter, Tam |
| Full Assess | LS/CMI 1 to 8 | |
| Case | Urn | Offend |
| 97 | S000005/13\$ | Engineer, Sc |
| 96 | S000005/13\$ | Engineer, Sc |

1. On Dashboard, click Administration

| | | | | | | | |
|---|-------------|----------------|----------|-----------|--------------------|-----------------------|----------------|
| Level of Service / Case Management Inventory (v2) - Users | | | | | | | |
| Dashboard | New Case | Administration | | | | | |
| Users | Add User | User Groups | Groups | Add Group | System Permissions | System Audit | System Reports |
| Users | | | | | | | |
| ID | User Name | Forename | Surname | Email | | | |
| Edit Delete Reset Password | User Groups | 1 | CManager | Case | Manager | cmanager@training.com | |
| Edit Delete Reset Password | User Groups | 3 | JJones | Jayne | Jones | aa@il.com | |

2. Click on Edit

| Title | Forename | Surname | Email | Phone | Prison | Last Login | Locked |
|-------|----------|----------|-------------------------------------|-------|--------|---------------------|-------------------------------------|
| | Case | Manager | cmanager@training.com | | | 07/01/2016 15:12:46 | <input type="checkbox"/> |
| | Jayne | Jones | aa@il.com | | | 14/08/2015 09:00:01 | <input checked="" type="checkbox"/> |
| | Ian | McIntosh | ian.mc@training.com | | | 12/10/2016 14:25:23 | <input type="checkbox"/> |
| | Les | Kerr | le@k.com | | | 02/03/2016 09:09:41 | <input type="checkbox"/> |
| | John | Bloggs | jj@jj.com | | | 10/08/2015 14:23:56 | <input type="checkbox"/> |
| | Trainer | One | tt@jj.com | | | 15/04/2016 14:12:07 | <input type="checkbox"/> |
| | Trainer | Two | hh@c.com | | | | <input type="checkbox"/> |
| | Trainer | Three | jj@jj.com | | | | <input type="checkbox"/> |
| | Trainer | Four | uu@h.com | | | | <input type="checkbox"/> |
| | Trainer | Five | kk@c.com | | | | <input type="checkbox"/> |
| | Julie | McDonald | julie@training.com | | | 05/10/2016 09:10:54 | <input type="checkbox"/> |
| | James | O'Grady | jogrady@training.com | | | 16/12/2015 09:23:02 | <input type="checkbox"/> |
| | Mark | McSherry | mark.mcsherry@RMScotland.gsi.gov.uk | | | 17/08/2016 14:43:15 | <input type="checkbox"/> |
| | Ian | McIntosh | lmcTL@training.com | | | 14/09/2016 13:52:39 | <input type="checkbox"/> |

3. Use scroll bar at foot of the table to scroll to far right hand side

| Forename | Surname | Email | Phone | Prison | Last Login | Locked |
|----------|----------|-----------------------|-------|--------|---------------------|-------------------------------------|
| Case | Manager | cmanager@training.com | | | 07/01/2016 15:12:46 | <input type="checkbox"/> |
| Jayne | Jones | aa@il.com | | | 14/08/2015 09:00:01 | <input checked="" type="checkbox"/> |
| Ian | McIntosh | ian.mc@training.com | | | 12/10/2016 14:25:23 | <input type="checkbox"/> |
| Les | Kerr | le@k.com | | | 02/03/2016 09:09:41 | <input type="checkbox"/> |
| John | Bloggs | jj@jj.com | | | 10/08/2015 | <input type="checkbox"/> |

4. Click in box to 'untick'

| | | | | ID | User Name | Title | Forename | Surname | Email |
|--------|--------|----------------|----------------|----|-----------|-------|----------|----------|-------------------------|
| Edit | Delete | Reset Password | User Groups | 1 | CManager | | Case | Manager | cmanager@training.com |
| Update | Cancel | Delete | Reset Password | 3 | JJones | | Jayne | Jones | aa@i.com |
| Edit | Delete | Reset Password | User Groups | 4 | Ian | | Ian | McIntosh | ian.mc@training.com |
| Edit | Delete | Reset Password | User Groups | 5 | LKerr | | Les | Kerr | le@k.com |
| Edit | Delete | Reset Password | User Groups | 6 | JBlog | | John | Bloggs | jj@jj.com |
| Edit | Delete | Reset Password | User Groups | 7 | training1 | | Trainer | One | tt@jj.com |
| Edit | Delete | Reset Password | User Groups | 8 | training2 | | Trainer | Two | hh@c.com |
| Edit | Delete | Reset Password | User Groups | 9 | training3 | | Trainer | Three | jj@jj.com |
| Edit | Delete | Reset Password | User Groups | 10 | training4 | | Trainer | Four | uu@h.com |
| Edit | Delete | Reset Password | User Groups | 11 | training5 | | Trainer | Five | kk@c.com |
| Edit | Delete | Reset Password | User Groups | 12 | Julie | | Julie | McDonald | julie@traini |
| Edit | Delete | Reset Password | User Groups | 16 | ogradyj | | James | O'Grady | jogradh@training.com |
| Edit | Delete | Reset Password | User Groups | 19 | Mark | | Mark | McSherry | msherry@RMAScotland.gsl |
| Edit | Delete | Reset Password | User Groups | 20 | TL | | Ian | McIntosh | lmcTL@training.com |

5. Use scroll bar to scroll back to the far left hand side of table

| | | | | ID | User Name | Title | Forename | Surname |
|--------|--------|----------------|----------------|----|-----------|-------|----------|----------|
| Edit | Delete | Reset Password | User Groups | 1 | CManager | | Case | |
| Update | Cancel | Delete | Reset Password | 3 | JJones | | Jayne | Jones |
| Edit | Delete | Reset Password | User Groups | 4 | Ian | | Ian | McIntosh |
| Edit | Delete | Reset Password | User Groups | 5 | LKerr | | Les | Kerr |

6. Click on Update

| | | | | ID | User Name | Title | Forename | Surname | Email |
|------|--------|----------------|-------------|----|-----------|-------|----------|----------|-----------------------|
| Edit | Delete | Reset Password | User Groups | 1 | CManager | | Case | Manager | cmanager@training.com |
| Edit | Delete | Reset Password | User Groups | 3 | JJones | | Jayne | Jones | aa@i.com |
| Edit | Delete | Reset Password | User Groups | 4 | Ian | | Ian | McIntosh | ian.mc@training.com |

7. Click on Reset Password

Message from webpage

Are you certain you want to reset this users password to the Default value?

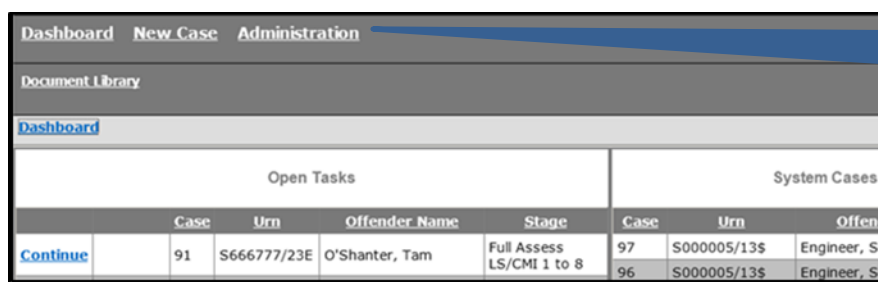
OK Cancel

8. A warning message will pop up. Click OK to proceed with resetting the user's password

Adding a new user group

If some users need to be able to do more (or less) than their current access rights allow, a new *User Group* with different permissions can be created rather than changing the permissions for the whole user group they are currently assigned to. The steps below incorporate the 3 stages required:

- Create the new user group
- Assign the required permissions to the new group
- Assign the required users to the new group



The screenshot shows the top navigation bar with 'Dashboard', 'New Case', and 'Administration'. Below it is a 'Document Library' section. The main content area has a 'Dashboard' sub-header and two tables: 'Open Tasks' and 'System Cases'. A blue callout box points to the 'Administration' link in the top bar.

| Open Tasks | | | | | System Cases | | |
|--------------------------|------|-------------|----------------|------------------------------|--------------|--------------|--------------|
| | Case | Urn | Offender Name | Stage | Case | Urn | Offend |
| Continue | 91 | S666777/23E | O'Shanter, Tam | Full Assess LS/CMI 1 to 8 | 97 | S000005/13\$ | Engineer, Sc |
| | | | | | 96 | S000005/13\$ | Engineer, Sc |

1. On Dashboard,
click [Administration](#)

Dashboard

New Case

Administration

Users

Add User

User Groups

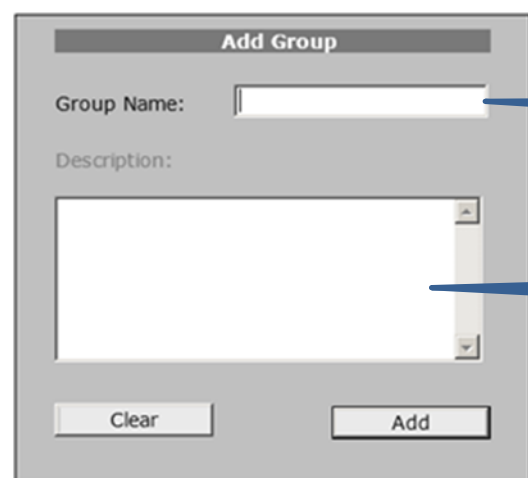
Groups

Add Group

Users

| | | | | ID | User Name | Title | Forename | Surname | Email |
|----------------------|------------------------|--------------------------------|-----------------------------|----|-----------|-------|----------|---------|---------------------------------------|
| Edit | Delete | Reset Password | User Groups | 1 | CManager | | Case | Manager | cmanager@training.com |
| Edit | Delete | Reset Password | User Groups | 3 | JJones | | Jayne | Jones | aa@il.com |

2. Click on [Add Group](#)



The screenshot shows the 'Add Group' form. It has a 'Group Name' text input field and a 'Description' text area. At the bottom are 'Clear' and 'Add' buttons. A blue callout box points to the 'Group Name' field.

Group Name:

Description:

[Clear](#) [Add](#)

3. Give the group a
name

4. (optional) Provide
some detail about
this new group

Add Group

Group Name:

Description:

Team leader access rights plus range of administration rightst such as ability to unlock accounts/ reset passwords, add users and reopen records.

Saved Special Team Leaders

5. Click on **Add**

New group successfully added to the system

| Dashboard New Case Administration | | | | | | | | | |
|--|------------------------|--------------------------------|-----------------------------|----|-----------|-------|----------|---------|--|
| Users Add User User Groups Groups Add Group System Permissions System Audit System Reports | | | | | | | | | |
| <u>Users</u> | | | | | | | | | |
| | | | | ID | User Name | Title | Forename | Surname | Email |
| Edit | Delete | Reset Password | User Groups | 1 | CManager | | Case | Manager | cmanager@training.com |
| Edit | Delete | Reset Password | User Groups | 3 | JJones | | Jayne | Jones | aa@ii.com |

6. Click on Groups

| Dashboard New Case Administration | | | | | | | | | |
|--|------------------------|------------------------------------|--|----|----------------------|---|--|-----|-----|
| Welcome Ian McIntosh | | | | | | | | | |
| Users Add User User Groups Groups Add Group System Permissions System Audit System Reports | | | | | | | | | |
| <u>Users</u> > <u>User Groups</u> > <u>Groups</u> | | | | | | | | | |
| | | | | ID | Group Name | | | | |
| Edit | Delete | System Permissions | | 14 | Special Team Leaders | Team leader access rights plus range of administration rightst such as ability to unlock accounts/ reset passwords, add users and reopen records. | | Ian | Ian |
| Edit | Delete | System Permissions | | 13 | LS & Caledonian | | | Ian | Ian |
| Edit | Delete | System Permissions | | 12 | spec | | | Ian | Ian |
| Edit | Delete | System Permissions | | 11 | New One | SW + Caledonian Access | | a | a |
| Edit | Delete | System Permissions | | 9 | MFMC Only | | | a | a |
| Edit | Delete | System Permissions | | 8 | Cale Only | | | a | a |

7. Click on System Permissions for the new group

| Level of Service / Case Management Inventory (v2) - System Permissions | | | | LS/CM | Help | Log Out |
|--|------------------------------|-----------------|--------------------------|-------|------|---------|
| Dashboard New Case Administration | | | | | | |
| Users Add User User Groups Groups Add Group System Permissions System Audit System Reports | | | | | | |
| Users > User Groups > Groups > System Permissions | | | | | | |
| Select User Group: 14: Special Team Leaders | | | | | | |
| ID | Page | Level | Assign | | | |
| 10 | Web Page Content | Write | <input type="checkbox"/> | | | |
| 20 | User Administration | Read | <input type="checkbox"/> | | | |
| 30 | User Administration | Write | <input type="checkbox"/> | | | |
| 40 | User Group Administration | Read | <input type="checkbox"/> | | | |
| 50 | User Group Administration | Write | <input type="checkbox"/> | | | |
| 60 | System Audit | Read | <input type="checkbox"/> | | | |
| 65 | System Reports | Read | <input type="checkbox"/> | | | |
| 70 | Document Library | Read | <input type="checkbox"/> | | | |
| 80 | Document Library | Write | <input type="checkbox"/> | | | |
| 91 | Case Approval - Section 6.4 | Approve1 | <input type="checkbox"/> | | | |
| 92 | Case Approval - Section 8.4 | Approve2 | <input type="checkbox"/> | | | |
| 93 | Case Approval - Section 11.2 | Approve3 | <input type="checkbox"/> | | | |
| 110 | Offender Handling | Delete Offender | <input type="checkbox"/> | | | |

8. Click to tick [✓]
all permissions this
group needs

For more
information on
permissions, click
on [Help](#)

Dashboard

New Case

Administration

Welcome Ian McIntosh

Users

Add User

User Groups

Groups

Add Group

System Permissions

System Audit

System Reports

Users

» User Groups

» Groups

» System Permissions

Select User Group:

14: Special Team Leaders

| ID | Page | Assign |
|-----|------------------------------|-----------------|
| 10 | Web Page Content | Write |
| 20 | User Administration | Read |
| 30 | User Administration | Write |
| 40 | User Group Administration | Read |
| 50 | User Group Administration | Write |
| 60 | System Audit | Read |
| 65 | System Reports | Read |
| 70 | Document Library | Read |
| 80 | Document Library | Write |
| 91 | Case Approval - Section 6.4 | Approve1 |
| 92 | Case Approval - Section 8.4 | Approve2 |
| 93 | Case Approval - Section 11.2 | Approve3 |
| 110 | Offender Handling | Delete Offender |

9. Assign the
required users to
this new group (see
page 10)

Library

Accessing documents stored within the library:

Dashboard New Case Administration

Document Library

Open Tasks

| | Case | Urn | Offender Name | Stage | Case | U |
|--------------------------|------|-------------|---------------|------------------|------|--------|
| Continue | 89 | S000001/13D | Test, OLR | Offender History | 91 | S66677 |
| | | | | | 89 | S00000 |

10

1. On Dashboard
click Document
Library

Dashboard New Case Administration

Document Library

[Document Library](#)

CJSWR Logo Upload

Browse... [Upload Logo](#)

Document Upload

Search Browse... [Upload](#)

| | | | ID | File Name | Description |
|----------------------|------------------------|--------------------------|----|--|---|
| Edit | Delete | Download | 15 | Document Library Guidan... document 20180125.docx | Document provides overview of latest and training videos |
| Edit | Delete | Download | 14 | v5_1 Release Guidance Video January2018.avi | |
| Edit | Delete | Download | 13 | LSCMI IT Users Manual software v5_1 Release 20180125.docx | |
| Edit | Delete | Download | 11 | MFMC IT Users Manual - 20170828.docx | |

2. Click on Download for the
required document

Do you want to open or save LSCMI IT Users Manual software v5_1 Release 20180125.docx from 192.168.55.11?

3. Click on Open

Adding a document to the library:

Dashboard **New Case** **Administration**

Document Library

Open Tasks

| | Case | Urn | Offender Name | Stage | Case | U |
|--------------------------|------|-------------|---------------|------------------|------|--------|
| Continue | 89 | S000001/13D | Test, OLR | Offender History | 91 | S66677 |
| | | | | | 89 | S00000 |

10

1. On Dashboard click Document Library

Dashboard **New Case** **Administration**

Document Library

[Document Library](#)

CJSWR Logo Upload

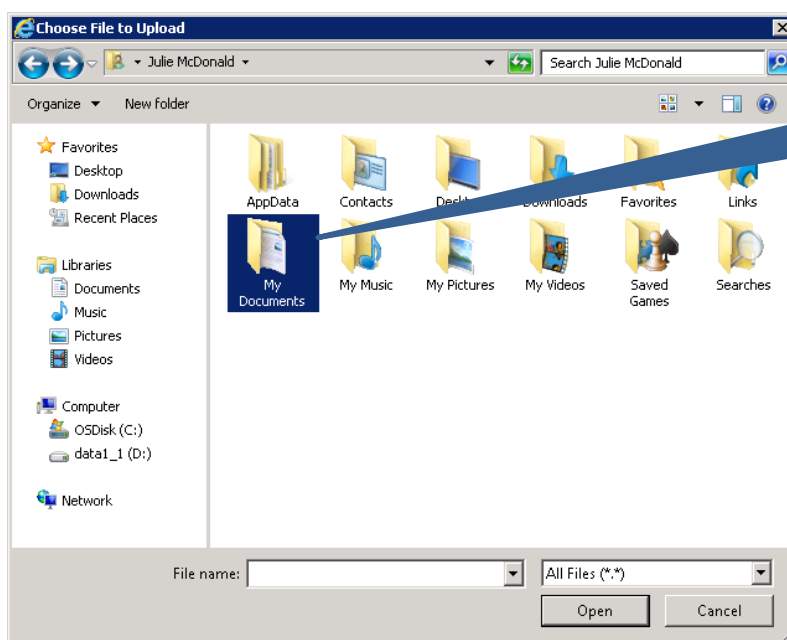
[Browse...](#) [Upload Logo](#)

Document Upload

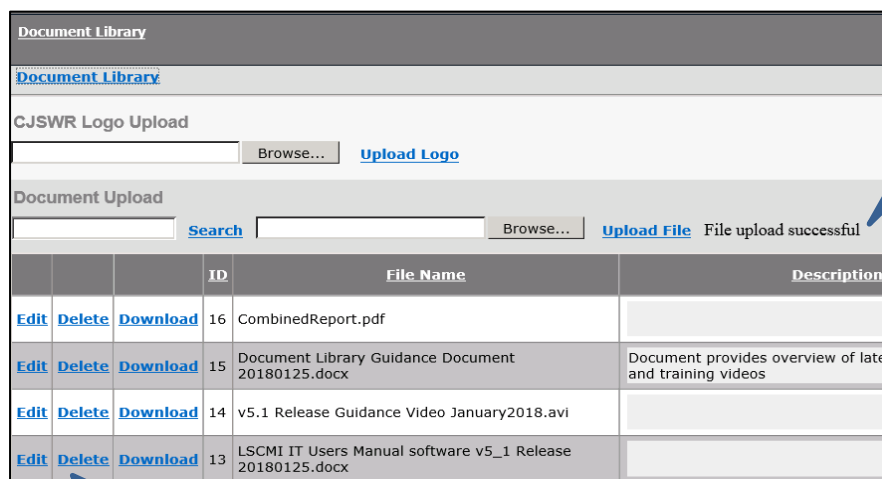
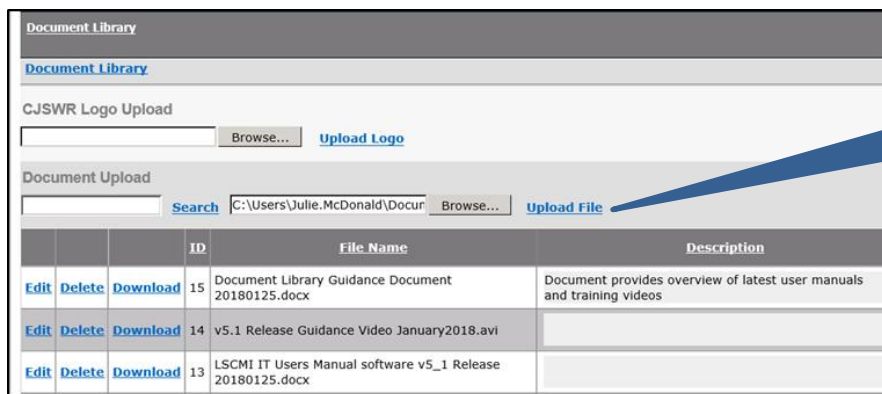
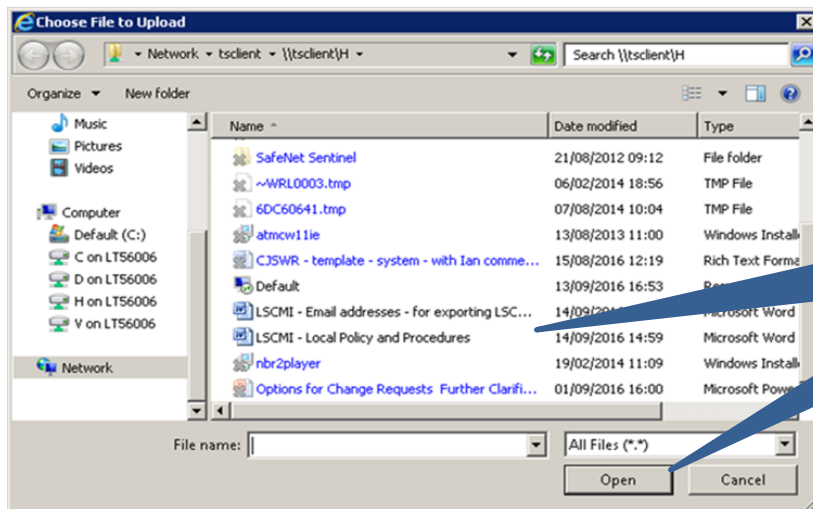
[Search](#) [Browse...](#) [Upload File](#)

| | | | ID | File Name | Description |
|----------------------|------------------------|--------------------------|----|---|--|
| Edit | Delete | Download | 15 | Document Library Guidance Document 20180125.docx | Document provides overview of latest and training videos |
| Edit | Delete | Download | 14 | v5.1 Release Guidance Video January2018.avi | |
| Edit | Delete | Download | 13 | LSCMI IT Users Manual software v5_1 Release 20180125.docx | |
| Edit | Delete | Download | 11 | MFMC IT Users Manual - 20170828.docx | |

2. Click on *Browse* and...



3. ...browse to where the document is stored



7. Out of date documents can be deleted/ replaced

NOTE

If the *Document Library* link is not visible on user dashboards, assign the library permissions to the business administrator group (and any other user groups who need access to the documents library):

- **Access right 70 (Document Library – Read)** is likely to be appropriate for all user groups as this will allow the user to access and read any document stored within the library
- **Access right 80 (Document Library – Write)** allows a user to add and remove documents from the library. It is recommended that this access right be provided to a limited number of users/ groups only

System Report

The following steps illustrate how to extract information on all cases within your LS/CMI system.

For additional guidance (for example, on how to report only on particular types of case), please refer to the separate guide, *The LS/CMI SYSTEM REPORT: How to extract data from the system*.

| | | |
|------------------|--------------|----------------|
| Dashboard | New Case | Administration |
| Document Library | | |
| Dashboard | | |
| Open Tasks | | |
| System Cases | | |
| Case | Urn | Offender Name |
| 91 | S666777/23E | O'Shanter, Tam |
| 97 | S000005/13\$ | Engineer, Sc |
| 96 | S000005/13\$ | Engineer, Sc |

1. On Dashboard, click on Administration

| | | |
|--------------|----------------|-----------------------|
| Dashboard | New Case | Administration |
| Users | Add User | User Groups |
| Groups | Add Group | System Permissions |
| System Audit | System Reports | |
| Users | | |
| ID | User Name | Title |
| 1 | CManager | Case |
| 3 | JJones | Jayne |
| Forename | Surname | Email |
| Manager | Manager | cmanager@training.com |
| Jones | Jones | aa@ii.com |

2. Click on System Reports

| | | |
|--------------------------|-------------------------|--------------------|
| Dashboard | New Case | Administration |
| Users | Add User | User Groups |
| Groups | Add Group | System Permissions |
| System Audit | System Reports | |
| Document Library | | |
| Users | System Reports | |
| Download To Excel | Enable Filters | |
| Case ID | URN | Local Reference |
| 86 | S483491/55R | P394875 |
| 85 | S089234/77N | P981273 |
| 84 | S765341/88Y | P2987322 |
| Interview Date | LSIR:SV Score | LSIR:SV Band |
| 08/02/2018 00:00:00 | 6 | Maximum |
| 08/02/2018 00:00:00 | | |
| 08/02/2018 00:00:00 | | |
| LSCMI 1-8 Score | LSCMI 1-8 Original Band | Override Requested |
| 21 | High | False |
| 14 | Medium | True |
| 18 | Medium | True |
| LSCMI 1-8 Requested Band | Approval Status | |
| High | Approved | |
| Low | Pending Approval | |

3. Click on Download To Excel

Do you want to open or save SystemsReport_20_04_2018_636598168249911866.xls from 192.168.55.11?

Open Save Cancel X

4. Open or Save

