Access to the Client Administration tool

The Client Administration tool allows LexisNexis customers to manage their own user accounts without assistance from customer support. With the Client Administration tool, client administrators may:

- Add new users
- Reset a user’s password
- Manage user profiles by suspending, re-activating and deactivating users
- Personalise user profiles by assigning users to preference groups
- Set up My Bookshelf sources for a preference group
- Create up to 20 new Practice Area Pages

To create a preference group or change a user’s subscription entitlements customers must contact their account manager.

1. Access to the Client Administration tool

Via the Admin link on LexisLibrary - [www.lexisnexis.com/uk/legal](http://www.lexisnexis.com/uk/legal)

Alternatively the administrator can go directly to the admin site by entering the url: [http://www.lexisnexis.com/uk/legal/cadmin/displayAttributeGroupListFrame.do](http://www.lexisnexis.com/uk/legal/cadmin/displayAttributeGroupListFrame.do)
Sign in to the Client Admin tool with the normal LexisLibrary access details.

Client Administrator Sign-on screen.

2. Adding a new user

Under the Users tab, click on Add a New User.
Add New User Wizard Step 1

The Add New User wizard appears. In step one of the wizard, enter the user's contact information. Click on the Next Step button.

Locate an existing user who works in the same area of practice and put a tick in the box to the left and click on Next Step.

Review the new user's contact information, product subscription, and content subscription group(s). If all is correct then click on OK - Create New User to complete the process.

The system displays the new user ID and temporary password, which you may email to the user directly from the system. The user will be required to change this password the first time they log in.

LexisPSL subscribers: If you have YourStyle as part of your LexisPSL subscription ensure the YourStyle option appears in the Subscription Groups. If it does not please contact Technical Support on 0845 370 1234 (Calls cost 7p/min).
3. Reviewing a user’s settings

On the **Find a User** tab enter the user’s last name and/or first name and/or user ID to search for a particular user. The search looks for exact matches. Note: If the user you are looking for doesn’t appear try using wildcards or truncation to broaden your search. If too many users appear enter more specific user details.

Find a User search form.

Click on the user’s name in the list to go to the User Details screen.
Resetting a user’s password
To reset a user’s password click on the Reset Password link under the ID and Password heading. The system displays a temporary password which may be emailed to the user directly from the system. The user will be required to change the temporary password upon logging in for the first time following the password reset.

Suspending, deactivating or re-activating a user

To suspend a user click on Suspended under the Status heading.
Note: A suspended user’s alerts are halted within 24 hours and permanently deleted in 30 days. If you do not re-activate this user within one year the user will be permanently deleted.

To re-activate a user follow the same steps but click on the Re-activate User link under the Status heading. If a user was suspended less than 30 days ago their alerts will be restored. If a user was suspended more than 30 days ago they will have to re-create their alerts.

Use Permanently deactivated to remove a user’s account.

Changing a user’s contact information
Contact details can be edited and saved on the User Details screen.
4. Viewing Preferences for a group of users

To view the default preferences for a group of users:

Step one: Click on the **Settings** tab.

Step two: Click on the **User Preferences** tab.

Step three: Select Account and Product to view a list of available Preference Groups. Select the Preference Group you wish to modify and click on **View Preferences**.

Changing Preferences for a group of users

To change the default preferences for a group of users change the settings of their Preference Group.

**Notes**

- If a preference setting is locked users will not be able to change it in their personal preferences. Click on the Locked/Not Locked link next to a preference setting to toggle it between locked and not locked.
- When changes are saved the new settings will take effect for all users in this Preference Group the next time they log in.

The default preferences for the selected Preference Group can be viewed and edited on the **General** and **Search and Results** tabs.

Click on **Save** when finished.
5. Viewing Application Settings for a group of users

Application Settings are basic attributes of the application such as:

- Whether users can save their sign-in information
- Whether project IDs are required
- The logo that appears on the general search form

These settings are managed within Preference Groups but these settings cannot be overwritten by users.

Changing application settings for a Preference Group

Click on the **Settings** tab

Step one: Click on the **Application Settings** tab.

Step two: Select an Account and Product to view a list of available Preference Groups. Select the Preference Group you want to modify and click on **View Settings**.

Step three: Change the application settings for the current group.

Step four: Click on **Save**. The new application settings will apply for users in this group the next time they log in.
6. Viewing/Amending User Preferences for a Group of Users

User Preferences are divided into three areas – General, Search and Results and Bookshelf Sources.

General Preferences consist of:
- What Start Page users see
- Whether users have to enter a project ID
- What language and time zone users see
- Whether or not pop-ups display

Changing General User Preferences

Click on the Settings tab

Step one: Click on the User Preferences tab, followed by the General tab.

Step two: Select an Account and Product to view a list of available Preference Groups. Select the Preference Group you wish to modify and click on View Preferences.

Step three: Change the user preference settings for the current group as required.

Step four: Click on Save when finished. The new User Preference settings will apply for users in this group the next time they log in.
Changing search & result user preferences

Search and Result Preferences consist of:

• The display of Results (number displayed and format)
• Results Group panel default
• How Documents are displayed
• Date range selection default

Click on the **Settings** tab

Step one: Click on the **User Preferences** tab, followed by the **Search & Results** tab further down the page.

Step two: Select an Account and Product to view a list of available Preference Groups. Select the Preference Group you want to modify and click on **View Preferences**.

Step three: Click on **Save** when finished. The new Search & Results settings will apply for users in this group the next time they log in.
Changing bookshelf sources

Bookshelf Sources enable you to manage the Bookshelf sources on the Home Page and on predefined Practice Area Pages.

Click on the **Settings** tab. Select an Account and Product to view a list of available Preference Groups. Select the Preference Group you want to modify and click on **View Preferences**.

Click on the **User Preferences** tab. Click on **Bookshelf Sources** tab. Click on the **Edit** link to the right of the Search Form / Practice Area Page for which you would like to amend the Bookshelf Sources.

Follow the three step process outlined to amend the Bookshelf Sources which appear on the selected practice area page.

Click on **Done** when finished. Repeat the steps above for all Forms/Practice Area Pages you wish to amend.

The new Bookshelf Sources settings will apply for users in this group the next time they log in.

7. Creating Customised Practice Area Pages

To create a new Practice Area Page for your users click on the **Settings** tab. Click on the **Customised Practice Area Pages** tab.

Select an Account and Product and click **View Custom Practice Area Page** to view a list of any Customised Practice Area Pages you have already created.

To create a new Practice Area page click **Create a New Practice Area Page**.
Fill out the form:

Give your Practice Area Page a name.

Determine which sources you would like to display on the Bookshelf following the process outlined.

Select up to 6 URLs which you would like to include. There is a drop-down menu of LexisNexis links which you may also include.

Click on Create when you are happy with the choices you have made. (Note: It will take up to one hour before you can view the Customised Practice Area Page you have just created. You will need to log out and log back in to see your new PAP).

You can edit or delete any Customised Practice Area Page you have created from the Customised Practice Area Pages tab by clicking on the appropriate Edit/Delete link and following the steps above.

Note: If you want to lock or unlock these pages, then go to the Bookshelf Sources tab in the User Preferences section. The same setting applies to both customised and standard practice area pages.

Note: If you have created a new user Preference Group since creating a new practice area page, the new group may not see the new practice area page. If this should happen click on the Re-publish link.