Lexis®Library Client Administra t on Tool User Guide

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

Alternatively the administrator can go directly to the admin site by entering the url:
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.

The system displays the new user ID

3. Reviewing a user's settings

On the Find a User

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.

To suspend a user click on Suspended under the Status heading.

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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.

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

- 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.

6. Viewing/Amending User Preferences for a Group of Users

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

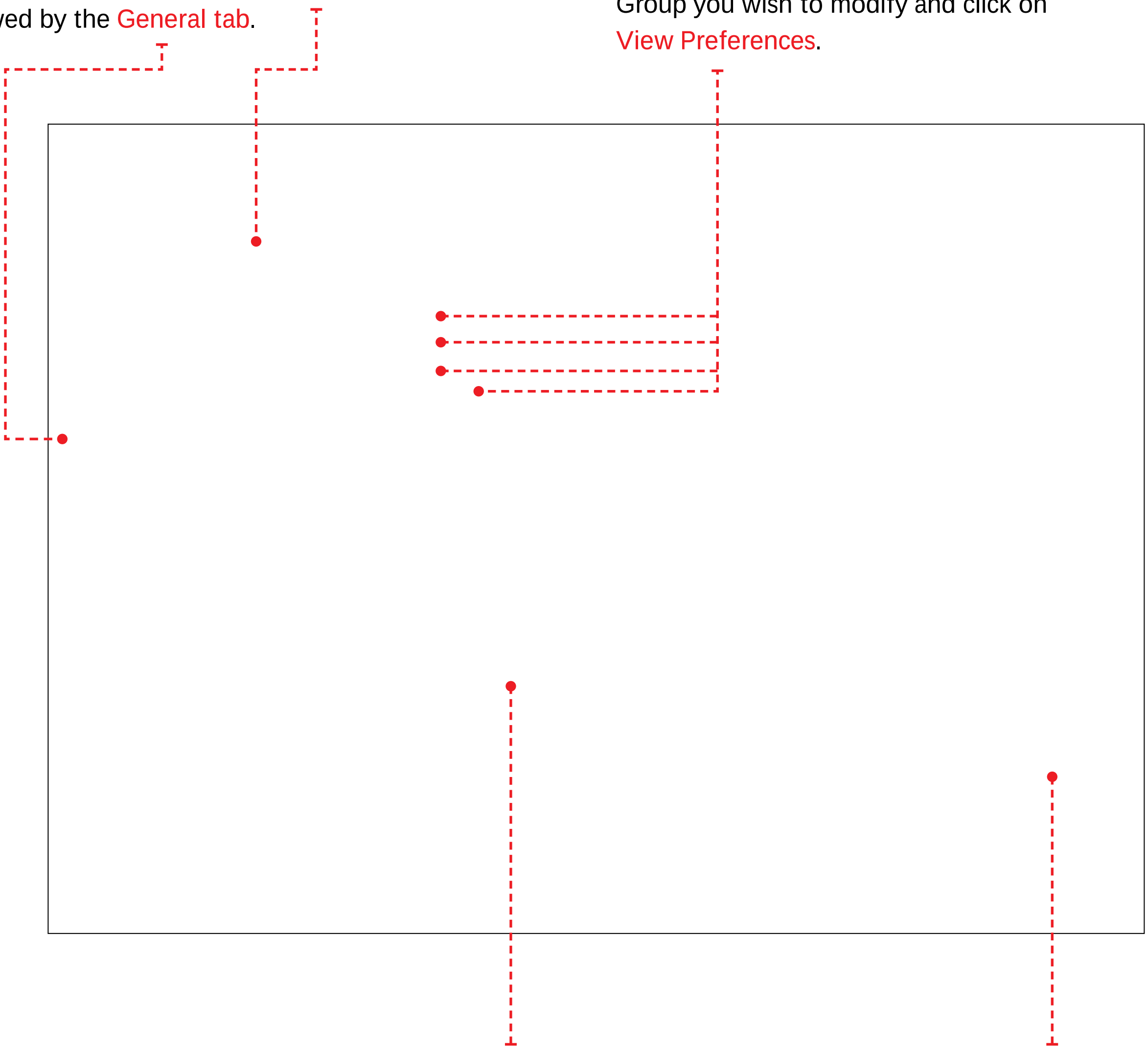
General Preferences consist of:

- 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

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.

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

Click on the Settings tab

Click on the User Preferences 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 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.

If you have added an annual, dated title to your customised bookshelf (such as the Orange and Yellow Handbooks) you might notice the dates do not update, even though the book has.

To update your titles, follow these steps in Client Admin:

Go to the ‘Settings’ Tab in the Client Admin tool.

- Lock/Unlock bookshelf property
  - From Client Admin tool, select Settings -> User Preferences
  - Select the required Preference Group and click on View Preferences
  - Then select Bookshelf Sources. This tab has option to lock/unlock the bookshelf property

- Resave bookshelf property for Customised PA
  - From Client Admin tool, select Settings -> Customised Practice Area Pages
  - Click on ‘Edit’ link and then click on ‘Save’ button
  - New pages become available 30 to 60 minutes after you create them. To see the new screens, you must sign out of Lexis®Library and then sign back in.

Once the titles have refreshed you can either put it back to locked or if you leave it unlocked it will most likely continue to update (when there are new editions, etc), but if you lock it you will still be able to update it whenever you want by using the instructions above.

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.

Visit our website **www.help.lexisnexis.co.uk**
or follow us on Twitter **@LNResources**
Helpdesk number: **0330 161 1234**

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