

QCase Firm Administration Guide

An organisation can nominate someone to register their organisation in [QCase](#) and manage employee access to the organisation's files. This includes configuring new and existing employee access and managing employee access to individual cases. These processes are performed by a user who is approved as a Firm Administrator for the organisation.

The Firm Administrator must register the organisation in QCase before other users can be registered as a user of the organisation. All users must register to access the QCase Portal as individuals (via [Queensland Digital Identity](#) or [myID](#)) with a work email address, with the same domain name as the organisation, so that they can be linked to the organisation.

Getting Started

Before setting up Firm Administration for your organisation we recommend you prepare for each stage:

1. Consider the tasks and workload and choose the right member of your organisation to take on the Firm Administrator responsibility. This is an important long-term role.
2. Prepare your digital identity using your business email and information – this will be a core part of your QCase login and essential for linking everyone within the same organisation.
3. Ensure only one person registers your organisation once and all the details are correct first time.
4. Advise other team members about what's required to setup their digital identity and QCase login details, so they can be successfully be added to the group and manage their cases.

QCase Portal role overview

Role	Register organisation	Manage users linked to the organisation	Commence cases and/or file documents	Access all cases linked to the organisation	Manage individual access to cases
Admin	✓	✓	✓	✓	✓
User			✓		

Case role overview

Role	Listed when a case is created	Able to manage individual access to cases	Listed when access is granted to a case
Firm Admin (Admin)	✓	✓	
Case Admin (user)	✓		
Case Contributor (user)			✓

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Register as a Firm Administrator in QCase

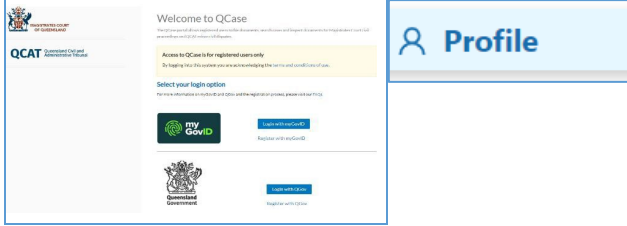


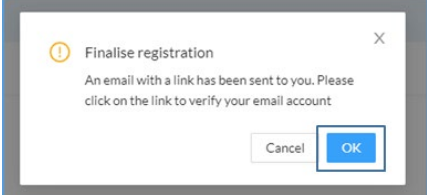
Overview

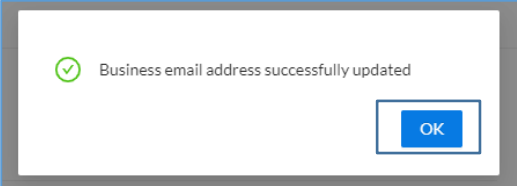
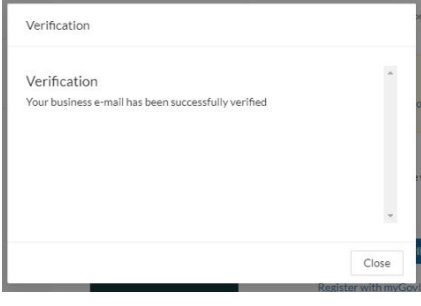
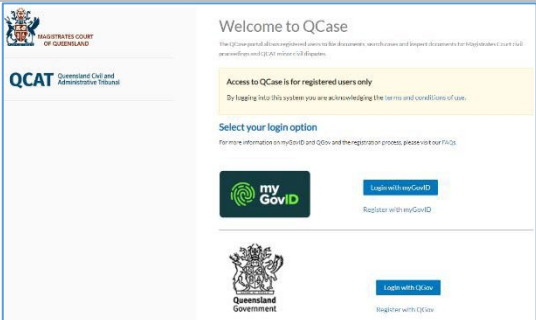
The Firm Administrator will need to register as a QCase user with either a Queensland Digital Identity or myID. For further guidance on this process, visit [QCase for Magistrates Courts FAQs](#) or [QCase for QCAT FAQs](#).

Once registered as a QCase user, they must register as a Firm Administrator before registering an organisation or business in QCase.

Each organisation must have at least one Firm Administrator. A Firm Administrator cannot remove themselves as the administrator of their organisation. In order for access to be removed another user must be assigned the role of Firm Administrator. The new Firm Administrator can then remove access.

Process

Step	Action
1	<p>Log into the QCase Portal and click Profile from the side menu.</p> 
2	<p>On the Profile page, enter a valid business email into the Business or Organisation email address field.</p>  <p>Note: The Firm Administrator's email domain must match the email domain of other users of the organisation. Ensure this is entered correctly. For example, all users with an email address ending in <i>@legalfirm.com</i> may be registered as a user of the organisation once their business email has been verified.</p> <p>Note: a personal email address should not be used for this purpose. Personal email addresses should only be used for individual access to QCase.</p>
3	<p>Click 'Update'.</p> 
4	<p>The Finalise registration pop-up appears. Click OK to trigger a verification email.</p> 

5	The user will be notified that the Business email has been successfully updated. Click OK .	
6	A verification email will be sent to the business email address registered in step 2. Open the email and click on the link in the verification email.	<p><i>Note:</i> The email will be addressed from no_reply@justice.qld.gov.au and may appear in the junk folder of your email client, depending on your organisation's email security settings.</p>
7	A new QCCase tab will open in the Firm Administrator's web browser. The Firm Administrator will be directed to the ' Welcome to QCCase ' screen and a Verification pop-up will appear. Click Close .	
8	The Firm Administrator will be returned to the ' Welcome to QCCase ' screen.	

Register an organisation or business (Firm Admin only)

Overview

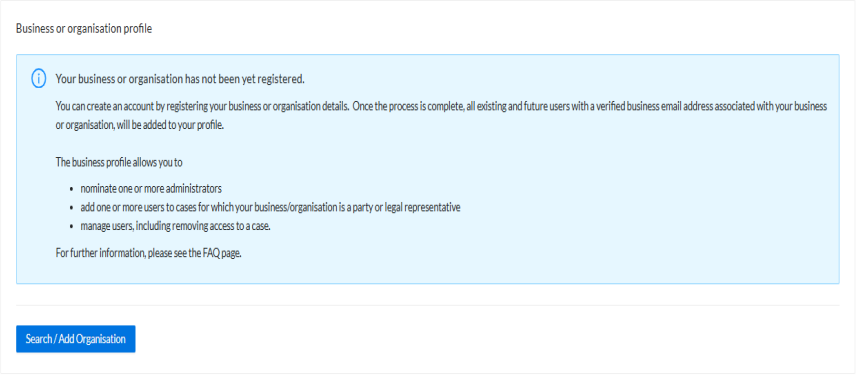
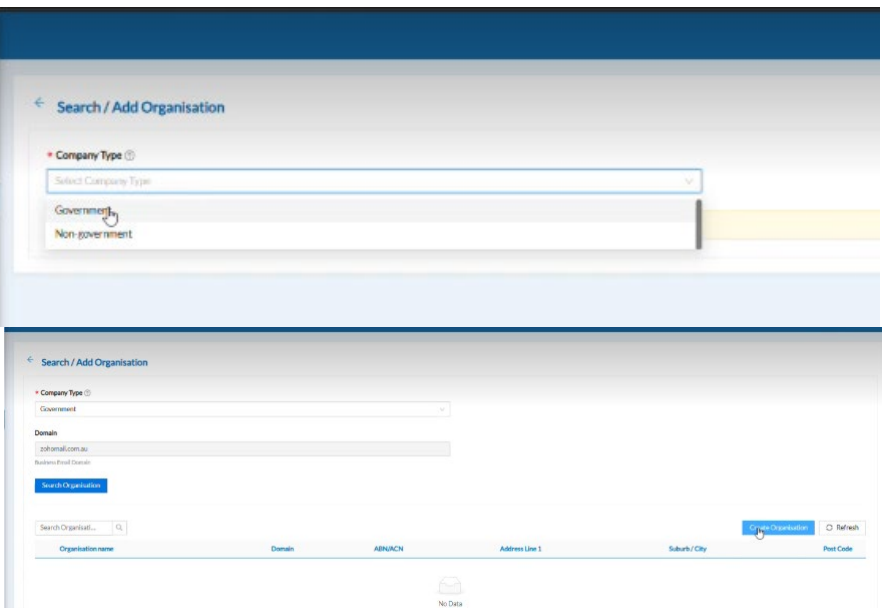
The Firm Administrator may now register an organisation or business in QCCase. This must be completed by the Firm Administrator. Once an organisation or business is registered, other individual users may then be registered as members of the organisation or business.

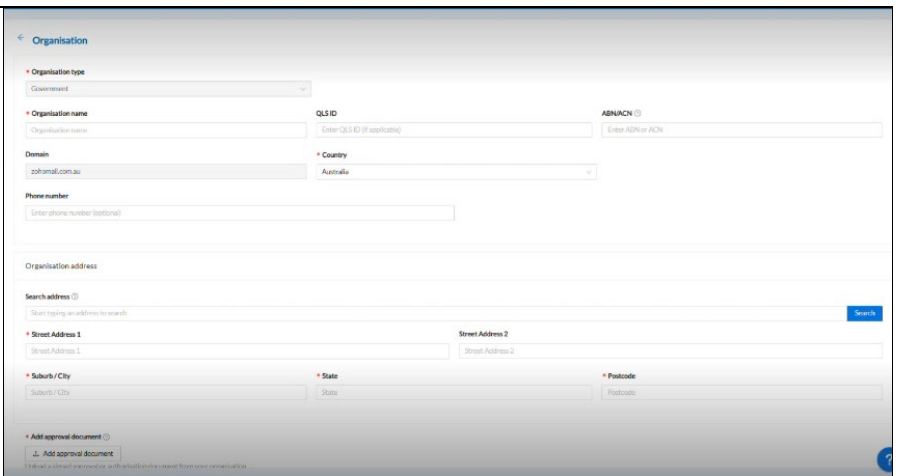
The registration process is different for government organisations and non-government organisations.

Please note that more than one organisation can be created for:

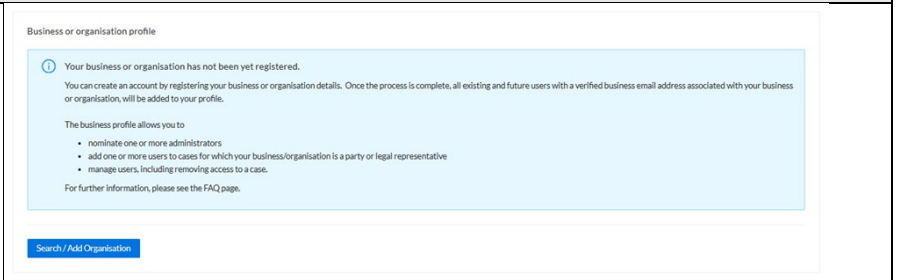
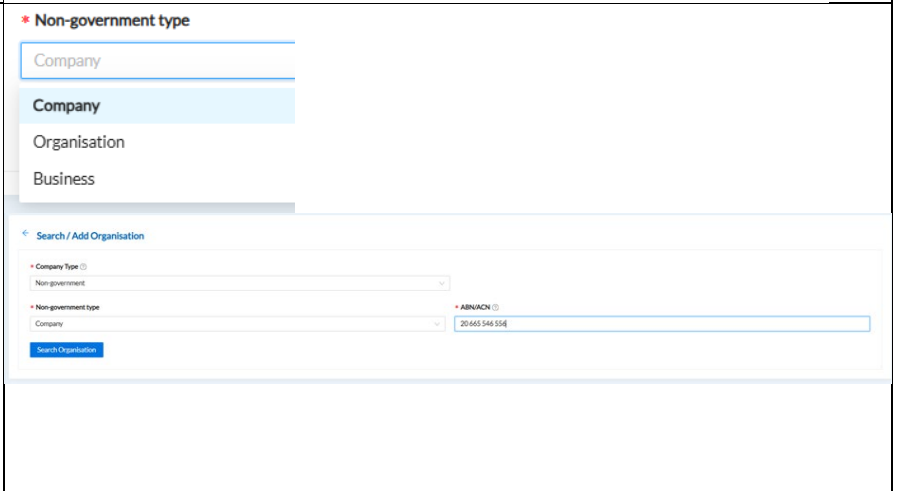
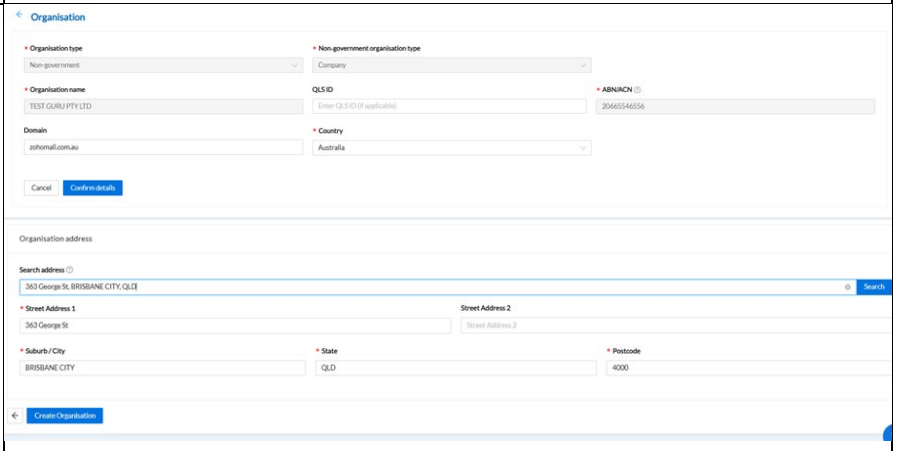
- same domain and different address for government Organisations.
- same ABN/ACN and different address for non-government organisations.

Process

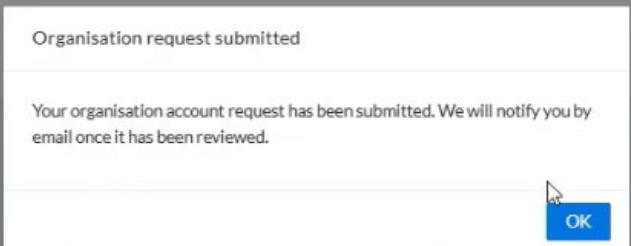
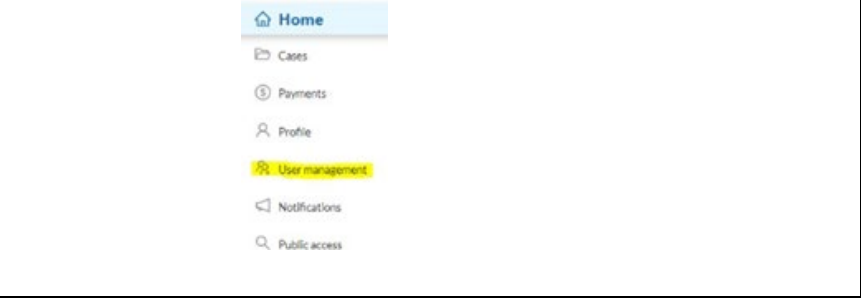
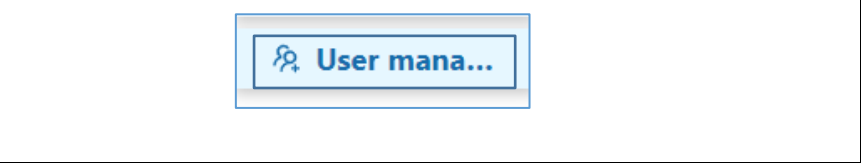
Step	Action
<h3>Create a Government Organisation</h3>	
<p>1</p> <p>After registering a business email, click Search/ Add Organisation.</p>	
<p>2</p> <p>On the Search/Add Organisation screen, select Government from the Company Type drop-down, then click Search /Add Organisation.</p> <p><i>Note:</i> The domain of the registered business email is automatically populated and cannot be edited.</p>	

<p>3</p>	<p>Enter in all mandatory information and attach an approval document from a manager including the organisation's letter head, then click Create Organisation Details when complete.</p> <p><i>Note:</i> All fields marked with * are mandatory fields.</p>	 <p>The screenshot shows the 'Organisation' form with the following fields: Organisation type (Government), Organisation name, QLS ID, ABN/ACN, Domain (zohomal.com.au), Country (Australia), Phone number, Organisation address, Search address, Street Address 1, Street Address 2, Suburb / City, State, and Postcode. There is a 'Search' button and a 'Create Organisation' button at the bottom.</p>
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Create a Non- Government Organisation

<p>1</p>	<p>After registering a business email, click Search/Add Organisation.</p>	 <p>The screenshot shows a message box titled 'Business or organisation profile' with the text: 'Your business or organisation has not been yet registered. You can create an account by registering your business or organisation details. Once the process is complete, all existing and future users with a verified business email address associated with your business or organisation, will be added to your profile. The business profile allows you to: nominate one or more administrators, add one or more users to cases for which your business/organisation is a party or legal representative, manage users, including removing access to a case. For further information, please see the FAQ page.' There is a 'Search / Add Organisation' button at the bottom.</p>
<p>2</p>	<p>On the Search/Add Organisation screen, select Non-government in the Company Type drop-down, then select Company, Organisation or Business. Fill in the ABN/ACN, then click Search /Add Organisation.</p> <p><i>Note:</i> The details entered are automatically checked with the Australian Business Register (ABR).</p>	 <p>The screenshot shows the 'Search / Add Organisation' form with the 'Non-government type' dropdown set to 'Company'. The ABN/ACN field contains '20665546556'. There is a 'Search Organisation' button at the bottom.</p>
<p>3</p>	<p>On the Organisation screen, check the information populated from the ABR details and click Confirm details. Fill in the address information and click Create Organisation.</p> <p><i>Note:</i> The domain can be provided but is not mandatory.</p>	 <p>The screenshot shows the 'Organisation' form with the 'Confirm details' button highlighted. The 'Non-government organisation type' dropdown is set to 'Company'. The 'Organisation name' field contains 'TEST GURU PVT LTD'. The 'ABN/ACN' field contains '20665546556'. The 'Domain' field contains 'zohomal.com.au'. The 'Country' field contains 'Australia'. The 'Organisation address' section is filled with '363 George St, BRISBANE CITY, QLD'. There is a 'Create Organisation' button at the bottom.</p>

Manage an organisation or business account

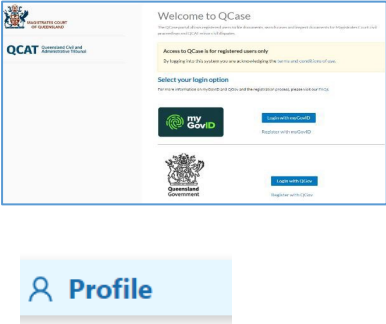
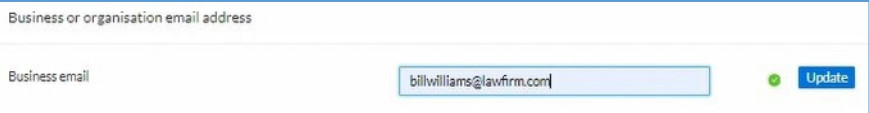
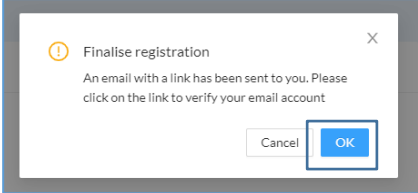
4	Once the request has been approved, the user will be promoted to Firm Administrator and receive an email about the outcome of the decision.		
5	<p>The Firm Administrator will see the User Management option in the side menu.</p> <p><i>Note:</i> If the User Management option does not appear in the side menu, click Refresh.</p>		
6	Click User Management to view the organisation's QCase Users.		
7	The Firm Administrator will be directed to the User Management screen where all users with a business email address of the same domain will be listed and can be managed.		

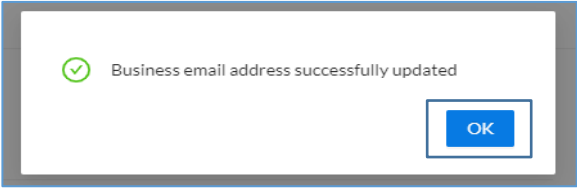
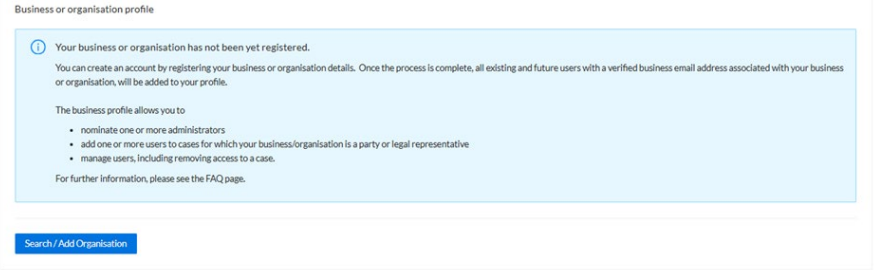
Register as a QCase user associated to an organisation (all users)

Overview

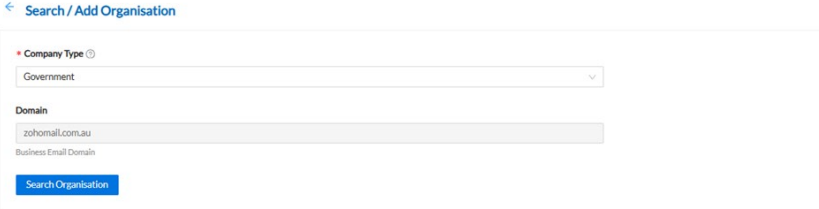
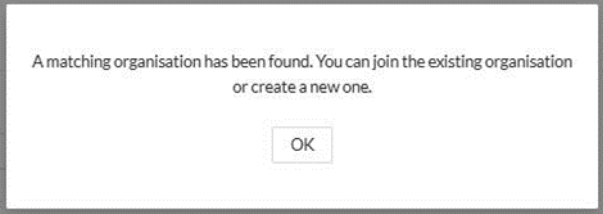
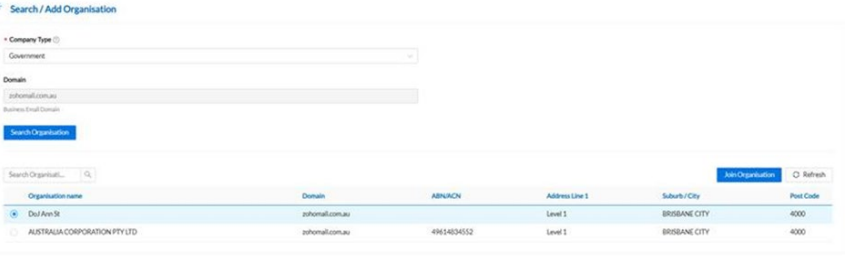
Each individual must register as a QCase user before they can register as a member of an organisation in QCase. Once registered as a QCase user, an individual must complete the following steps to be registered as a member of the organisation in QCase. This will allow the Firm Administrator/s to manage the user's access to the organisation's cases in QCase. It will also ensure that any cases created in QCase by the individual are linked to the organisation.

Process

Step	Action
Register a business email address	
<p>1</p> <p>Log into the QCase Portal and click Profile.</p>	
<p>2</p> <p>On the Profile page, enter a valid business email into the Business or Organisation email address field.</p> <p><i>Note:</i> The user's email domain must match the Firm Administrator's email domain.</p>	
<p>3</p> <p>After clicking Update, the Finalise registration pop-up appears. Click OK to trigger a verification email.</p>	

4	The user will be notified that the Business email has been successfully updated. Click OK .	
5	A verification email will be sent to the registered business email.	<i>Note:</i> The email will be addressed from no_reply@justice.qld.gov.au and may appear in the junk folder of your email client, depending on your organisation's email security settings.
6	Once the email has been verified, click on Search /Add Organisation .	

Join a Government Organisation

1	<p>On the Search/Add Organisation page, select Government as the Company type , then click Search Organisation.</p> <p><i>Note:</i> The domain of the registered business email is automatically populated and cannot be edited.</p>	 																					
2	<p>Select the Organisation you want to join and click Join Organisation.</p> <p><i>Note:</i> As there can be more than one account with the same domain for a government organisation, the user must select the firm they want to join based on the email domain and business address (the combination of the</p>	 <table border="1" data-bbox="630 1697 1481 1787"> <thead> <tr> <th>Search Organisation</th> <th>Organisation name</th> <th>Domain</th> <th>ABN/ACN</th> <th>Address Line 1</th> <th>Suburb/City</th> <th>Post Code</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/></td> <td>Dal Ave St</td> <td>zohomall.com.au</td> <td></td> <td>Level 1</td> <td>BRISBANE CITY</td> <td>4000</td> </tr> <tr> <td><input type="radio"/></td> <td>AUSTRALIA CORPORATION PTY LTD</td> <td>zohomall.com.au</td> <td>4961402452</td> <td>Level 1</td> <td>BRISBANE CITY</td> <td>4000</td> </tr> </tbody> </table>	Search Organisation	Organisation name	Domain	ABN/ACN	Address Line 1	Suburb/City	Post Code	<input checked="" type="radio"/>	Dal Ave St	zohomall.com.au		Level 1	BRISBANE CITY	4000	<input type="radio"/>	AUSTRALIA CORPORATION PTY LTD	zohomall.com.au	4961402452	Level 1	BRISBANE CITY	4000
Search Organisation	Organisation name	Domain	ABN/ACN	Address Line 1	Suburb/City	Post Code																	
<input checked="" type="radio"/>	Dal Ave St	zohomall.com.au		Level 1	BRISBANE CITY	4000																	
<input type="radio"/>	AUSTRALIA CORPORATION PTY LTD	zohomall.com.au	4961402452	Level 1	BRISBANE CITY	4000																	

	domain and address will be the identifier).	
3	Click Confirm , then an email notification is then sent to Firm Admin about the join request.	
4	The firm administrator can then go to User Management and approve or reject the request. The user will receive an email notification about the request status.	

Join a Non-Government Organisation

1	On the Search/Add Organisation page, fill in the ABN/ACN, then click Search Organisation .	
2	Select the Organisation you want to join and click Join Organisation . <i>Note:</i> As there can be more than one account with the same ABN/ACN for non-government organisations, the user must select the firm they want to join based on ABN/ACN and business address (the combination of the ABN/ACN and address will be the identifier).	

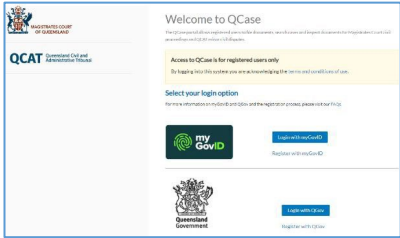
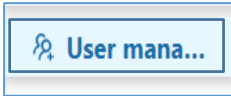
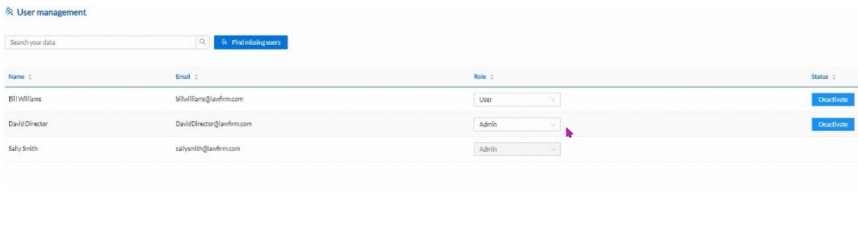
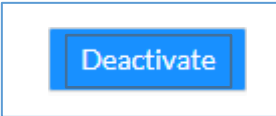
3	Click Confirm . An email notification is then sent to the firm administrator about the join request.	
4	The firm administrator can then go to User Management and approve or reject the request. User then will get the email notification about the request status.	
5	<p>The QCase user has been successfully set up. The user can now commence cases, file documents and search cases as a member of the organisation.</p> <p>Note: It is important to ensure that the user is associated with the business or organisation before commencing cases or filing documents, as a member of the organisation. If the user is not associated with the business or organisation prior to starting a case, this could cause access issues for other users of the organisation.</p> <p>Note: A Remove button will appear next to the registered Business email on the users Profile screen. Whilst the user can utilise this function to remove their association to the business it is recommended that any access changes are managed by the Firm Administrator.</p>	

Manage the organisation's QCase Users (Firm Admin only)

Overview

Once a QCase user registers in the QCase Portal and verifies their business email address, the Firm Administrator is able to view those users as members of their organisation. The Firm Administrator will then be able to manage each users access to the organisation's cases in QCase.

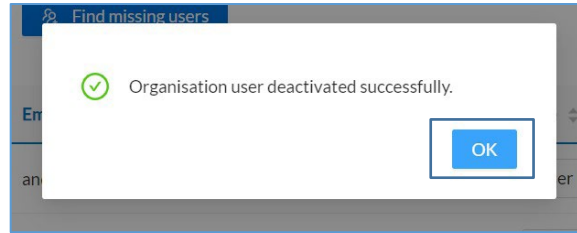
Process

Step	Action
1	Log into the QCase Portal . 
2	From the Home screen, click User Management . 
3	From this screen the Firm Administrator can view the organisation's members. The Firm Administrator can change a user's access to Admin if required or can change another Admin user's access to User .  <p>Note: If the organisation's members do not appear in the list, click Refresh.</p> <p>Note: If a user's access is changed to Admin the user will be able to view all cases linked to the organisation.</p>
4	The Firm Administrator can also remove a user from their organisation. Identify the user to be removed and click Deactivate .  <p>Note: A Firm Administrator cannot remove themselves as the administrator of their organisation. The Firm Administrator must first assign the role of Admin to another user and then the new Firm Administrator can remove their access.</p>

5

An **Organisation user deactivated successfully** pop-up will appear. Click **OK**.

The user will no longer be able to access any cases associated to the organisation.



Note: The user will still appear in the **User Management** screen on any cases they previously had access to as a **Case Contributor** but will show a red **Activate** button in the **Action** column and will be unable to access the case.

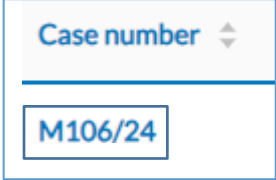
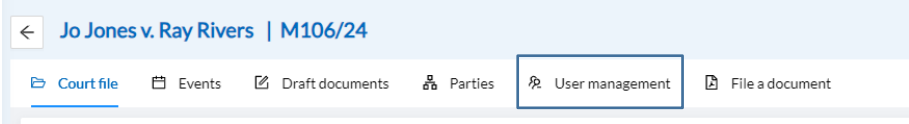
Note: if you wish to reinstate a deactivated user, the Firm Administrator will need to contact a Registry.

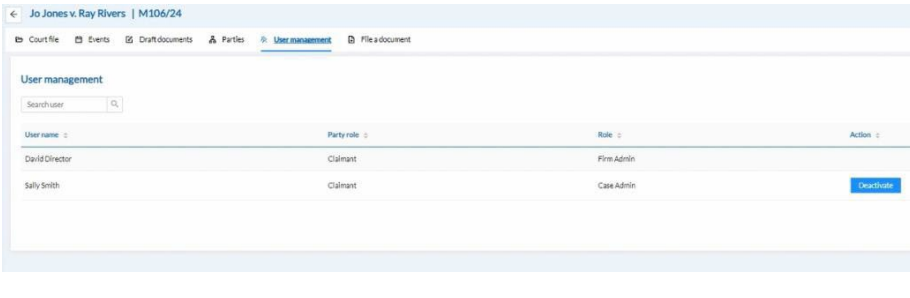

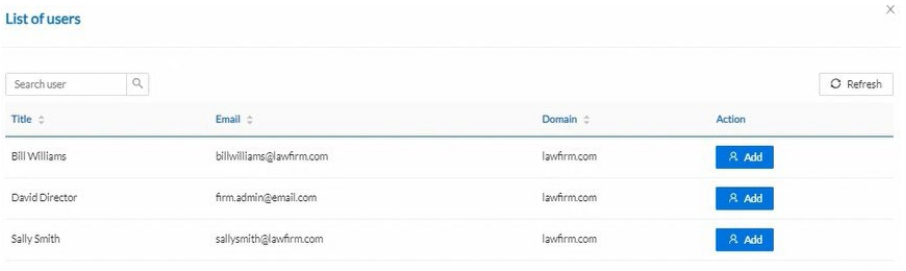

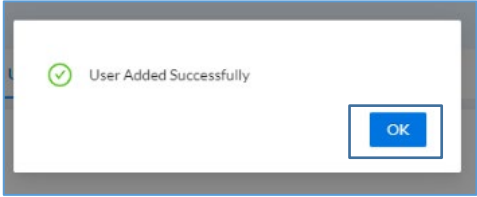

Manage user access to individual cases (Firm Admin only)


Overview

The Firm Administrator can manage the organisation's QCase users' access to specific cases. The Firm Administrator can view all cases created or accessed by the organisation's QCase users.

Process

Step	Action
1	<p>Log into the QCase Portal.</p> 
2	<p>Click Cases.</p> <p><i>Note:</i> From the Cases screen the Firm Administrators can view all cases that are associated to the organisation. The Firm Administrator can also view cases from the Home screen under the Recent Cases section.</p> 
3	<p>To manage access to a specific case, find the relevant case number from the list or use the search function to find the case and click the specific Case Number.</p> 
4	<p>The Firm Administrator is directed to the case. To allocate the specific case to another QCase user within the organisation, click User Management, from the available tabs.</p> 

5	<p>The Firm Administrator is directed to the User Management screen and can review the organisation's QCase users who currently have access to the case.</p>	
<p>Note: There are three types of roles that can appear on a case. A Firm Administrator will appear as Firm Admin. The user who created the case will appear as Case Admin. A user who is added to the case will appear as a Case Contributor.</p> <p>Note: If the case is created by a Firm Administrator, then only the Firm Administrator will appear on the case as Firm Admin and no other user will have access to this case.</p>		
6	<p>To add additional QCase users to the specific case, Click Add Another.</p>	
7	<p>A List of Users pop-up will appear, displaying a list of QCase users associated to the organisation.</p>	
8	<p>Identify the QCase user that requires access to the specific case and click Add.</p>	
9	<p>A User Added Successfully pop-up will appear, Click OK.</p>	
10	<p>The Firm Administrator will be directed back to the User Management screen and the newly added QCase user will appear in the list of users with access to the specific case.</p>	

11	Click Refresh if the user does not appear.	<i>Note:</i> The additional QCase user granted access by the Firm Administrator to the specific case will be able to view the case when the user next signs in to QCase by selecting Case from the side menu.
12	If necessary, the Firm Administrator can also Deactivate a Case Contributor or Case Admin from the case via the User Management screen. Identify the QCase user to be removed from the specific case and click Deactivate .	
13	<p>A User Successfully Deactivated pop-up will appear, Click OK.</p> <p><i>Note:</i> once a user is deactivated, the user will be unable to access the case in QCase. If access is required, the Firm Administrator will need to navigate to the User Management screen on the case and click Activate to grant the user access to the specific case again.</p>	