

## Assign court case(s) to OU Account(s) by SA of the same branch, including assignment by PA (by case number)

Whenever an Organization opts to transact with the e-Courts electronically for a specific court case (i.e. linking up of an Organization Account with that specific court case), the PA, or SA, is required to assign that specific court case to OU Account(s) before the account holder(s) can carry out further electronic transactions with the e-Courts by means of iCMS<sup>1</sup>.

There are **two types of case link-up**, namely -

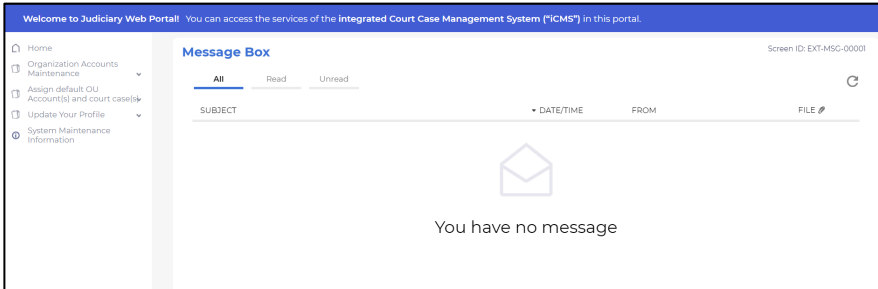
(1) Assign case(s) by **Profile** to OU(s) – If SA decides to assign court cases according to case profile (e.g. Personal Injuries Action of the District Court) to designated OU(s) of the same branch, no further link-up of such type of cases individually will be required.

(2) Assign case(s) by **Case No.** to OU(s) – If SA opts to assign individual cases to designated OUs of the same branch one by one, the OUs can only access to those particular cases that SA entitles them to access.

This step-by-step guide outlines the general process required

- to link-up court case to an OU Account **by SA of the same branch, including assignment by PA by Case Number**<sup>2</sup>; and
- to remove case(s) assigned to SA by PA **by Case Number**.

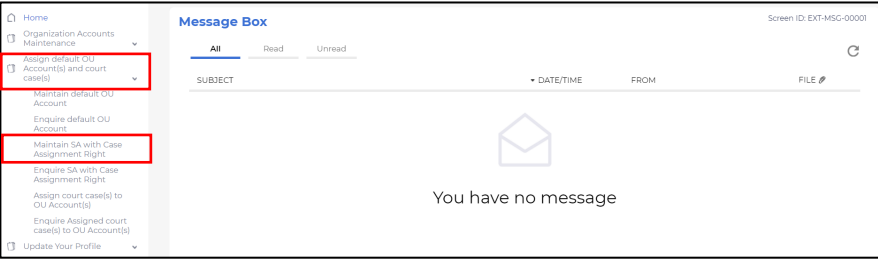
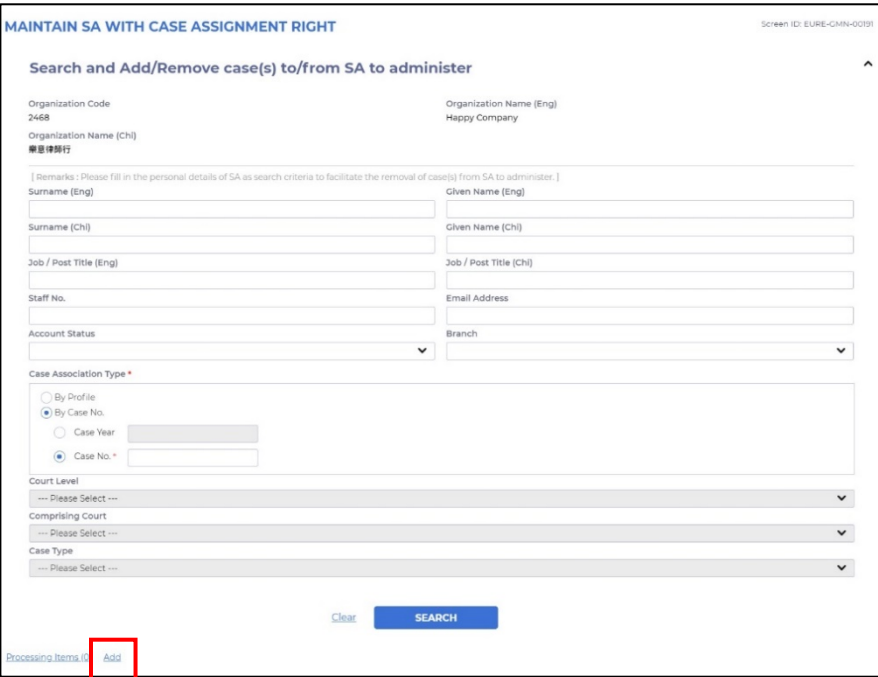
It is for general guidance only. The screenshots provided hereunder are for general illustration purpose and may not be specific for the case/document concerned.

Item	Process	Related screenshots for reference
1.	<p><b><u>Login user account</u></b></p> <p><i>[Note: Please refer to the step-by-step guide <b>Account Login and Logout</b> for information if necessary.]</i></p>	<p>The landing page after logged-in is displayed</p> 
<b>NOTE</b>	<p>The function of “Maintain SA with Case Assignment Right” is only available to the PA(s) of the Organization to access.</p>	

<sup>1</sup> When assigning court case to OU Account, PA and SA should be cautious to avoid conflict of interest.

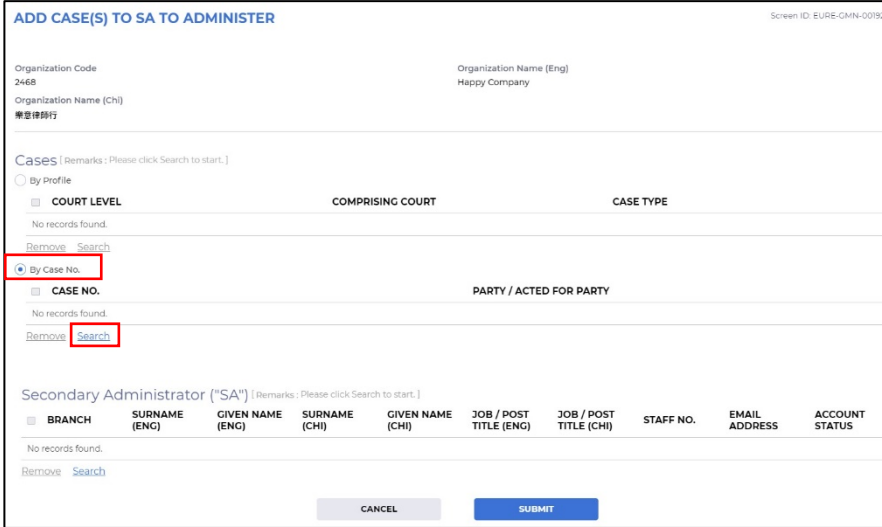
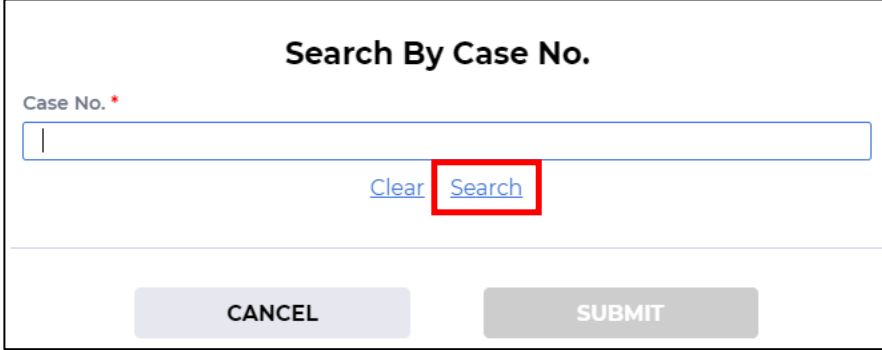

<sup>2</sup> For assignment of cases to OUs by profile, please refer to the step-by-step guide on **Assign court case(s) to OU Account(s) by SA of the same branch, including assignment by PA (by profile)** for more information.

Step-by-step guide - “Assign court case(s) to OU Account(s) by SA of same branch, including assignment by PA (by case number)”

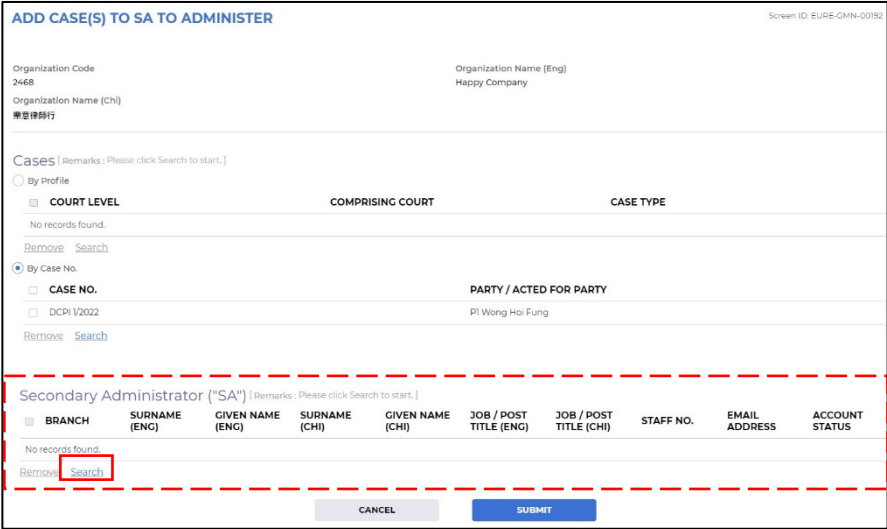
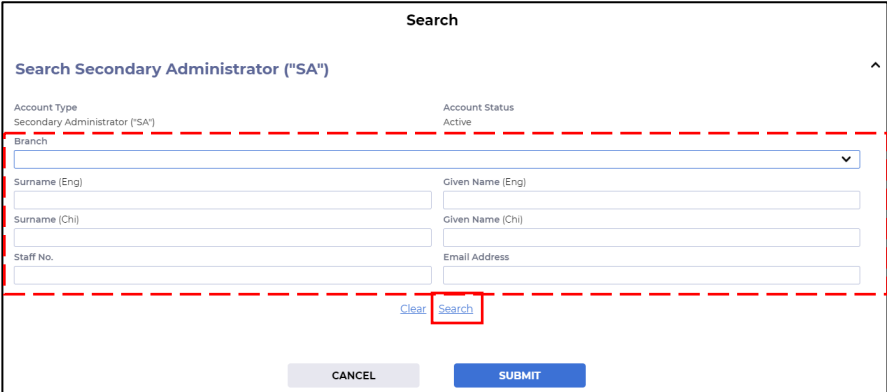
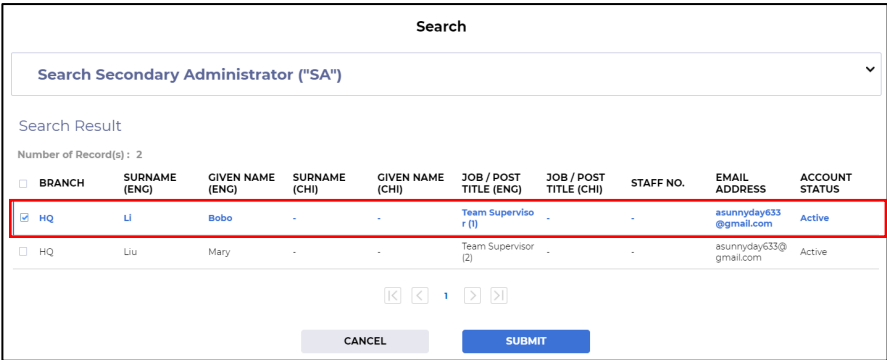
Item	Process	Related screenshots for reference
2.	<p><b><u>Assign default OU Account(s) and court case(s)</u></b></p> <p>After logging in with a PA account, under Main Menu &gt;</p> <p>Assign default OU Account(s) and court case(s) &gt;</p> <p>Select Maintain SA with Case Assignment Right &gt;</p>	<p>The landing page of PA Account after logged-in is displayed</p> 
<p><b>Add case(s) to SA to administer (by case number)</b></p>		
3.	<p><b><u>Maintain SA with Case Assignment Right</u></b></p> <p>Scroll to the bottom of the page, click “Add” for case association type selection &gt;</p> <p><i>[Note: Please refer to items 22 to 26 for procedure on removal of assigned case(s) (by case number) from SA(s).]</i></p>	<p>The “Maintain SA with Case Assignment Right” screen is displayed</p> 
<p><b>NOTE</b></p>	<p>By default, the maximum number of SAs linked up with each case party is ten. A PA may raise request to change the setting by using the function “Request change of Organization Configuration” <sup>3</sup>.</p>	

<sup>3</sup> Please refer to the step-by-step guide **Request change of organization configuration** for more information.

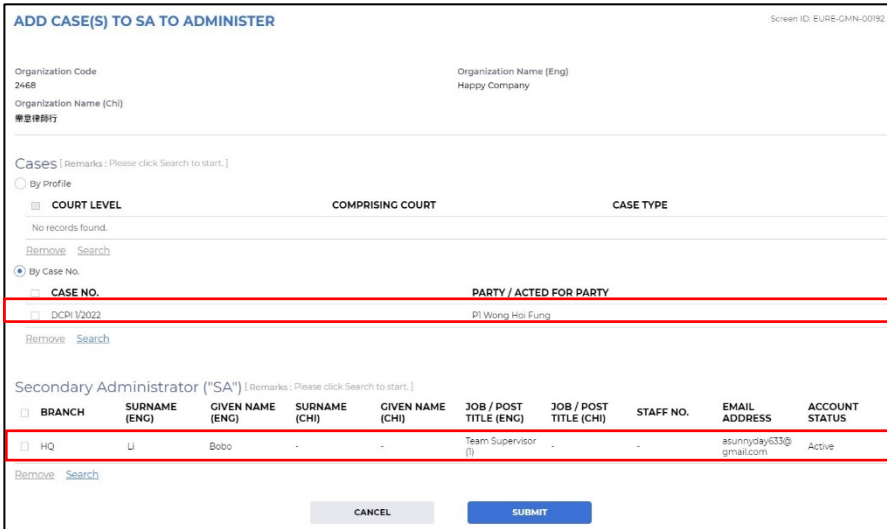
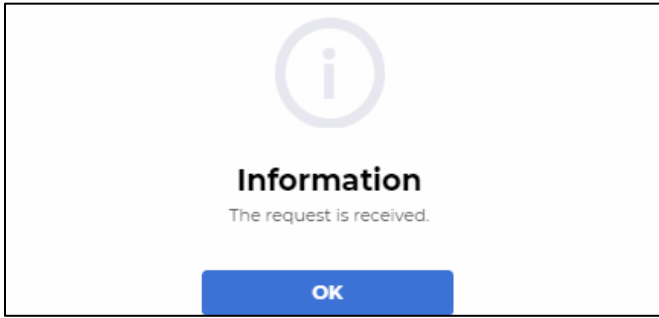
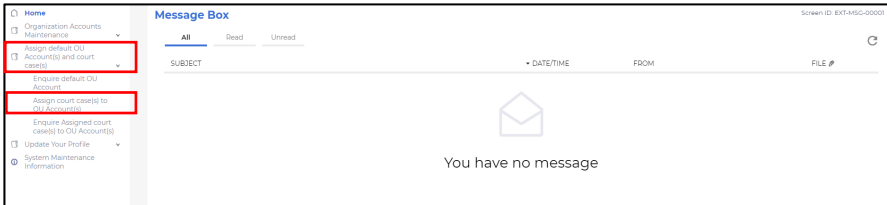
Step-by-step guide - “Assign court case(s) to OU Account(s) by SA of same branch, including assignment by PA (by case number)”

Item	Process	Related screenshots for reference
4.	<p><b><u>Add Case(s) to SA by case number</u></b></p> <p>Select the option “By Case No.” &gt;</p> <p>Click “Search” &gt;</p>	<p>The “Add Case(s) to SA to administer” screen is displayed</p> 
5.	<p><b><u>Input the case number</u></b></p> <p>Input the Case No. &gt;</p> <p>Click “Search” &gt;</p>	<p>The “Search By Case No.” screen is displayed</p> 
6.	<p><b><u>Select the Case No. to be linked up to a SA</u></b></p> <p>Search result shows in the record table.</p> <p>Tick the checkbox next to the case no. to be linked up to a SA &gt;</p> <p>Click “SUBMIT” &gt;</p>	<p>The “Search result” screen is displayed</p> 
<p><b>NOTE</b></p>	<p>PA may add more cases (up to ten) for assignment to SAs) by repeating Items 4 to 6.</p>	

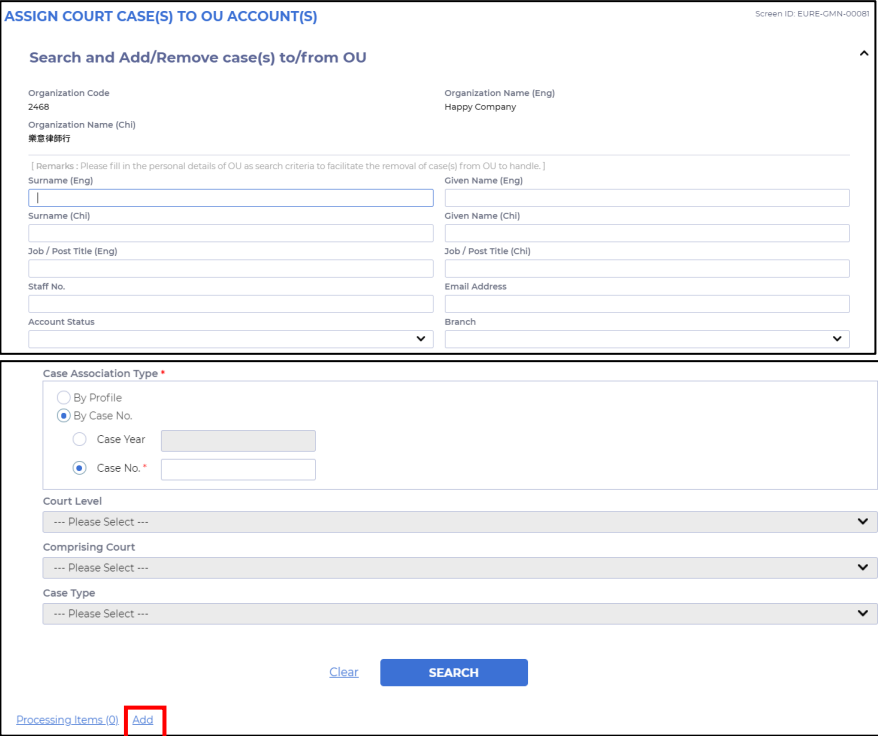
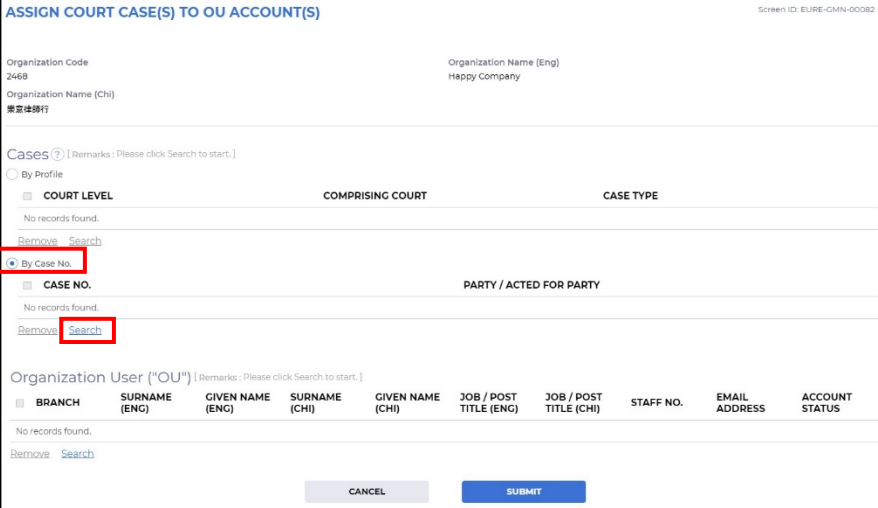
Step-by-step guide - “Assign court case(s) to OU Account(s) by SA of same branch, including assignment by PA (by case number)”

Item	Process	Related screenshots for reference																														
7.	<p><b><u>Search for a SA</u></b></p> <p>Under “Secondary Administrator (“SA”)” section</p> <p>Click “Search” &gt;</p>	<p>The “Add Case(s) to SA to administer – Secondary Administrator (“SA”)” screen is displayed</p> 																														
8.	<p><b><u>Input the search criteria to search a SA</u></b></p> <p>Input search criteria &gt;</p> <p>Click “Search” &gt;</p>	<p>The “Search Secondary Administrator (“SA”)” screen is displayed</p> 																														
9.	<p><b><u>Select the SA to whom cases to be linked-up by case number</u></b></p> <p>Depending on the search criteria entered, the result will then display</p> <p>Select the checkbox next to the SA(s) you want to assign the selected case no. to &gt;</p> <p><i>[Note: PA may select more than one SAs to link-up with the selected case number(s)]</i></p> <p>Click “SUBMIT” &gt;</p>	<p>The “Search result of Secondary Administrator (“SA”)” screen is displayed</p>  <table border="1"> <thead> <tr> <th>BRANCH</th> <th>SURNAME (ENG)</th> <th>GIVEN NAME (ENG)</th> <th>SURNAME (CHI)</th> <th>GIVEN NAME (CHI)</th> <th>JOB / POST TITLE (ENG)</th> <th>JOB / POST TITLE (CHI)</th> <th>STAFF NO.</th> <th>EMAIL ADDRESS</th> <th>ACCOUNT STATUS</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>HQ</td> <td>Li</td> <td>Bobo</td> <td>-</td> <td>Team Supervisor (1)</td> <td>-</td> <td>-</td> <td>asunnyday633@gmail.com</td> <td>Active</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HQ</td> <td>Liu</td> <td>Mary</td> <td>-</td> <td>Team Supervisor (2)</td> <td>-</td> <td>-</td> <td>asunnyday633@gmail.com</td> <td>Active</td> </tr> </tbody> </table>	BRANCH	SURNAME (ENG)	GIVEN NAME (ENG)	SURNAME (CHI)	GIVEN NAME (CHI)	JOB / POST TITLE (ENG)	JOB / POST TITLE (CHI)	STAFF NO.	EMAIL ADDRESS	ACCOUNT STATUS	<input checked="" type="checkbox"/>	HQ	Li	Bobo	-	Team Supervisor (1)	-	-	asunnyday633@gmail.com	Active	<input type="checkbox"/>	HQ	Liu	Mary	-	Team Supervisor (2)	-	-	asunnyday633@gmail.com	Active
BRANCH	SURNAME (ENG)	GIVEN NAME (ENG)	SURNAME (CHI)	GIVEN NAME (CHI)	JOB / POST TITLE (ENG)	JOB / POST TITLE (CHI)	STAFF NO.	EMAIL ADDRESS	ACCOUNT STATUS																							
<input checked="" type="checkbox"/>	HQ	Li	Bobo	-	Team Supervisor (1)	-	-	asunnyday633@gmail.com	Active																							
<input type="checkbox"/>	HQ	Liu	Mary	-	Team Supervisor (2)	-	-	asunnyday633@gmail.com	Active																							

Step-by-step guide - “Assign court case(s) to OU Account(s) by SA of same branch, including assignment by PA (by case number)”

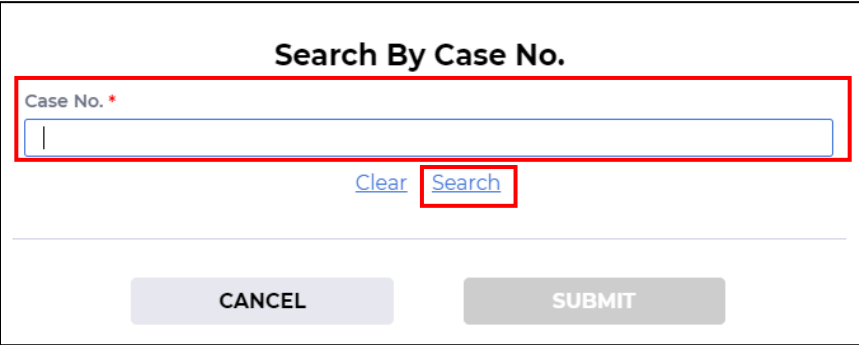

Item	Process	Related screenshots for reference
10.	<p><b><u>Confirm the options selected</u></b></p> <p>Check the case no. selected in Item 6 and the SA(s) selected in Item 9.</p> <p>Then click “SUBMIT” &gt;</p>	<p>All the selected options are displayed</p> 
11.	<p><b><u>Acknowledgement</u></b></p> <p>Click “OK” to complete &gt;</p>	<p>A pop-up message screen is displayed</p> 
<b>NOTE</b>	<p>SA can link up case to OUs of same branch by case number <b>AFTER</b> the related case is assigned by PA to this SA.</p>	
12.	<p><b>SA to assign court cases to OU by case number – <u>Assign default OU Account(s) and court case(s)</u></b></p> <p>After logging in with the designated SA Account, under Main Menu &gt;</p> <p>Select Assign default OU Account(s) and court case(s) &gt;</p> <p>Select Assign court case(s) to OU Account(s) &gt;</p>	<p>The landing page of SA Account after logged-in is displayed</p> 

Step-by-step guide - “Assign court case(s) to OU Account(s) by SA of same branch, including assignment by PA (by case number)”

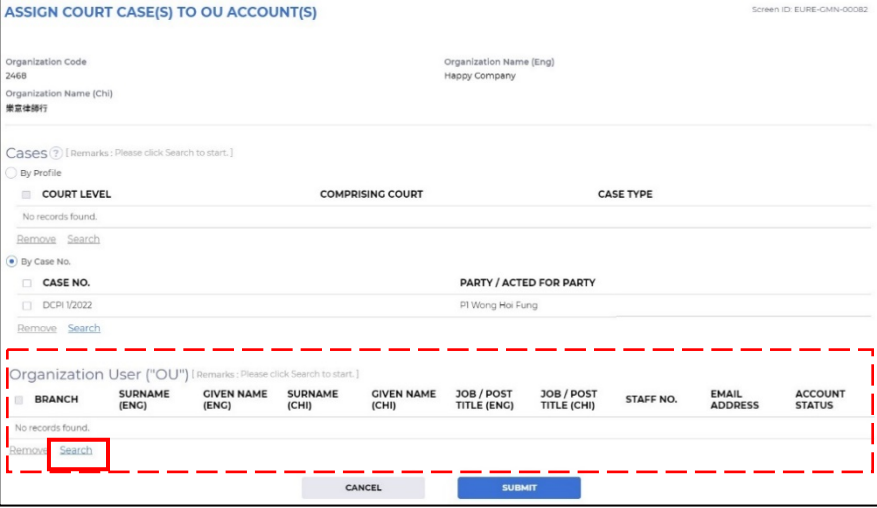
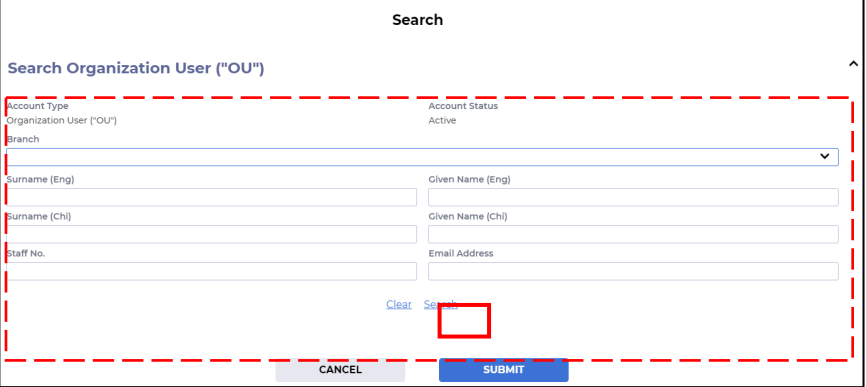
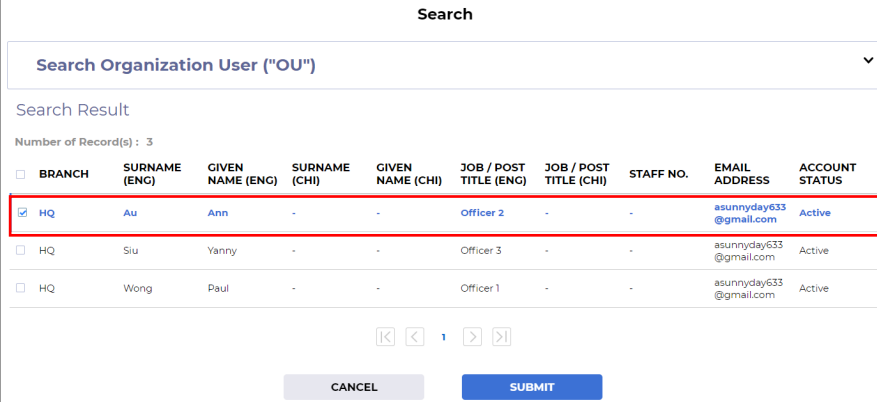
Item	Process	Related screenshots for reference
13.	<p><b><u>Assign court case(s) to OU Account(s)</u></b><sup>4</sup></p> <p>Scroll to the bottom of the page, click “Add” for case association type selection &gt;</p>	<p>The “Assign court case(s) to OU Account(s)” screen is displayed</p> 
<b>NOTE</b>	<p>By default, the maximum number of OUs linked up with each case party is ten. A PA may raise request to change the setting by using the function “Request change of Organization Configuration”<sup>3</sup>.</p>	
14.	<p><b><u>Assign cases to OU by case number</u></b></p> <p>Select the option “By Case No.” &gt;</p> <p>Click “Search” &gt;</p>	<p>The “Assign court case(s) to OU Account(s) – Case Association” screen is displayed</p> 

<sup>4</sup> For removal of assigned case(s) (by case number) from OU(s), please refer to the step-by-step guide on **Assign court case(s) to OU Account(s) by PA/SA (by case number)**.

Step-by-step guide - “Assign court case(s) to OU Account(s) by SA of same branch, including assignment by PA (by case number)”

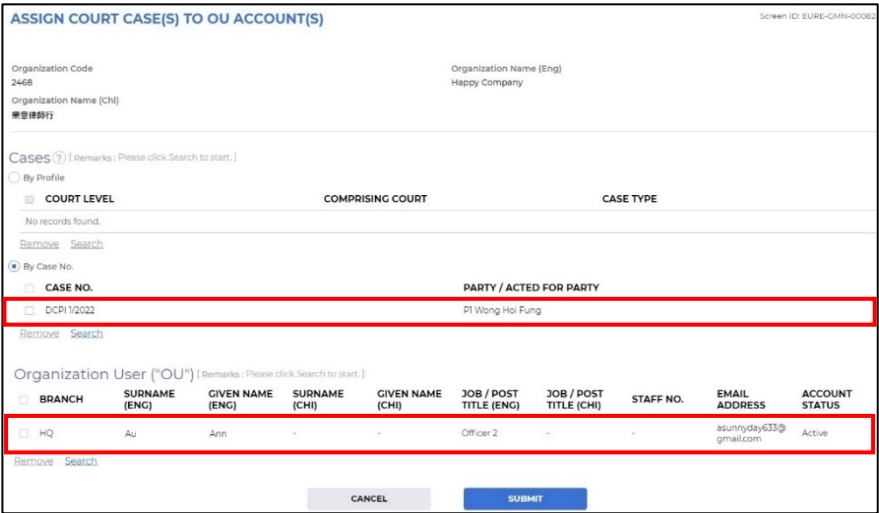
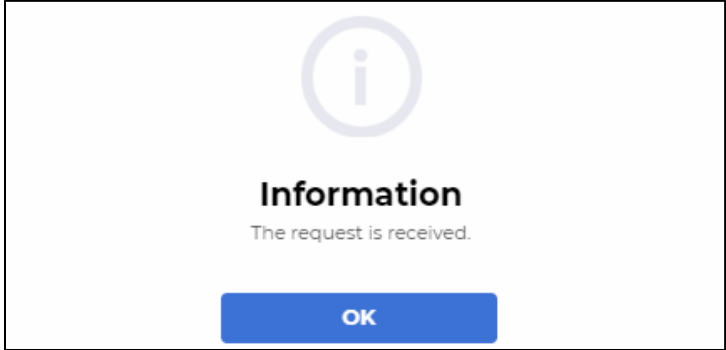
Item	Process	Related screenshots for reference
15.	<p><b><u>Input the case no.</u></b></p> <p>Input the Case No. &gt;</p> <p>Click “Search” &gt;</p>	<p>The “Search By Case No.” screen is displayed</p> 
16.	<p><b><u>Select the Case No. to be linked up to an OU</u></b></p> <p>Search result shows in the record table.</p> <p>Tick the checkbox next to the case no. to be linked up to an OU &gt;</p> <p>Click “SUBMIT” &gt;</p>	<p>The “Search result” screen is displayed</p> 
<b>NOTE</b>	<p>SA may add more cases (up to ten) for assignment to OU(s) by repeating Items 14 to 16.</p>	
17.	<p><b><u>Search for an OU</u></b></p> <p>Under “Organization User (“OU”)” section</p> <p>Click “Search” &gt;</p>	<p>The “Assign court case(s) to OU Account(s) – Organization User (“OU”)” screen is displayed</p>

Step-by-step guide - “Assign court case(s) to OU Account(s) by SA of same branch, including assignment by PA (by case number)”

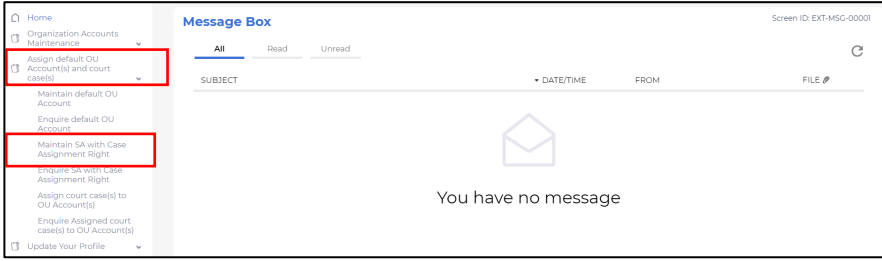
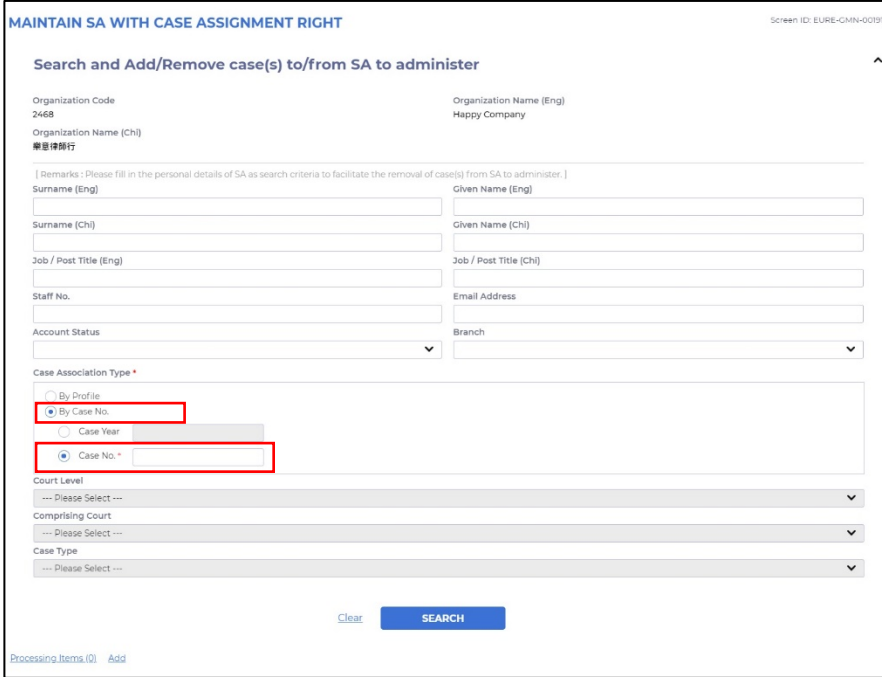
Item	Process	Related screenshots for reference																																								
																																										
18.	<p><b><u>Input the search criteria to search an OU</u></b></p> <p>Input search criteria &gt;</p> <p>Click “Search” &gt;</p>	<p>The “Search Organization User (“OU”)” screen is displayed</p> 																																								
19.	<p><b><u>Select the OU to whom cases to be linked-up by case number</u></b></p> <p>Depending on the search criteria entered, the result will then display</p> <p>Select the checkbox next to the OU(s) you want to assign the selected case no. to &gt;</p> <p><i>[Note: SA may select more than one OUs to link-up with the selected case number(s)]</i></p> <p>Click “SUBMIT” &gt;</p>	<p>The “Search Result of Organization User (“OU”)” screen is displayed</p>  <table border="1" data-bbox="639 1612 1511 1766"> <thead> <tr> <th>BRANCH</th> <th>SURNAME (ENG)</th> <th>GIVEN NAME (ENG)</th> <th>SURNAME (CHI)</th> <th>GIVEN NAME (CHI)</th> <th>JOB / POST TITLE (ENG)</th> <th>JOB / POST TITLE (CHI)</th> <th>STAFF NO.</th> <th>EMAIL ADDRESS</th> <th>ACCOUNT STATUS</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>HQ</td> <td>Au</td> <td>Ann</td> <td>-</td> <td>Officer 2</td> <td>-</td> <td>-</td> <td>asunnyday633@gmail.com</td> <td>Active</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HQ</td> <td>Siu</td> <td>Yanny</td> <td>-</td> <td>Officer 3</td> <td>-</td> <td>-</td> <td>asunnyday633@gmail.com</td> <td>Active</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HQ</td> <td>Wong</td> <td>Paul</td> <td>-</td> <td>Officer 1</td> <td>-</td> <td>-</td> <td>asunnyday633@gmail.com</td> <td>Active</td> </tr> </tbody> </table>	BRANCH	SURNAME (ENG)	GIVEN NAME (ENG)	SURNAME (CHI)	GIVEN NAME (CHI)	JOB / POST TITLE (ENG)	JOB / POST TITLE (CHI)	STAFF NO.	EMAIL ADDRESS	ACCOUNT STATUS	<input checked="" type="checkbox"/>	HQ	Au	Ann	-	Officer 2	-	-	asunnyday633@gmail.com	Active	<input type="checkbox"/>	HQ	Siu	Yanny	-	Officer 3	-	-	asunnyday633@gmail.com	Active	<input type="checkbox"/>	HQ	Wong	Paul	-	Officer 1	-	-	asunnyday633@gmail.com	Active
BRANCH	SURNAME (ENG)	GIVEN NAME (ENG)	SURNAME (CHI)	GIVEN NAME (CHI)	JOB / POST TITLE (ENG)	JOB / POST TITLE (CHI)	STAFF NO.	EMAIL ADDRESS	ACCOUNT STATUS																																	
<input checked="" type="checkbox"/>	HQ	Au	Ann	-	Officer 2	-	-	asunnyday633@gmail.com	Active																																	
<input type="checkbox"/>	HQ	Siu	Yanny	-	Officer 3	-	-	asunnyday633@gmail.com	Active																																	
<input type="checkbox"/>	HQ	Wong	Paul	-	Officer 1	-	-	asunnyday633@gmail.com	Active																																	




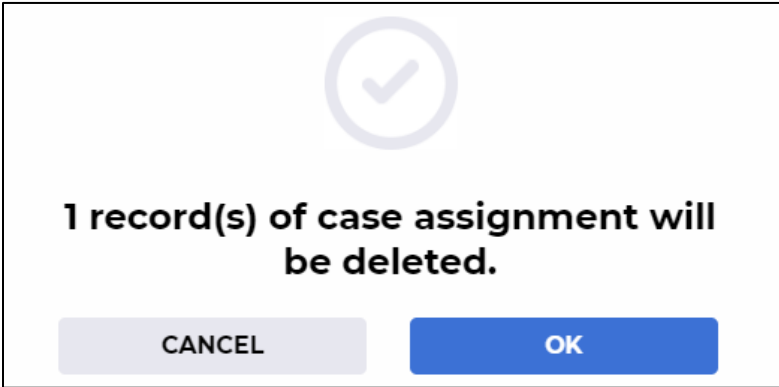
Step-by-step guide - “Assign court case(s) to OU Account(s) by SA of same branch, including assignment by PA (by case number)”

Item	Process	Related screenshots for reference
20.	<p><b><u>Confirm the options selected</u></b></p> <p>Check the case no. selected in Item 16 and the OU(s) selected in Item 19</p> <p>Then click “SUBMIT” &gt;</p>	<p>All the selected options are displayed</p>  <p>The screenshot shows the 'ASSIGN COURT CASE(S) TO OU ACCOUNT(S)' interface. It includes fields for Organization Code (2468) and Organization Name (Happy Company). Under 'Cases', the 'By Case No.' option is selected, and a table displays a case 'DCP11/2022' assigned to 'PI Wong Hoi Fung'. Below, the 'Organization User' section shows a table with columns for Branch, Surname, Given Name, Job/Post Title, Staff No., Email Address, and Account Status. The user 'Au Ann' is selected. Both the case and user rows are highlighted with red boxes. Buttons for 'CANCEL' and 'SUBMIT' are at the bottom.</p>
21.	<p><b><u>Acknowledgement</u></b></p> <p>Click “OK” to complete &gt;</p>	<p>A pop-up message screen is displayed</p>  <p>The screenshot shows an information pop-up message screen. It features a large 'i' icon, the text 'Information' and 'The request is received.', and a blue 'OK' button.</p>

Step-by-step guide - “Assign court case(s) to OU Account(s) by SA of same branch, including assignment by PA (by case number)”

Item	Process	Related screenshots for reference
<b>Remove Case(s) from SA to administer (by case number)</b>		
22.	<p><b><u>Assign default OU Account(s) and court case(s)</u></b></p> <p>After logging in with a PA account, under Main Menu &gt;</p> <p>Select Assign default OU Account(s) and court case(s) &gt;</p> <p>Select Maintain SA with Case Assignment Right &gt;</p>	<p>The landing page of PA Account is displayed</p> 
23.	<p><b><u>Search existing case assignment record with SA - by case number</u></b></p> <p><i>[Note: From this screen, apart from inputting the required fields relating to Case Association Type, you may also input other search criteria (e.g. personal particulars of SA) to narrow down the search result.]</i></p> <p>Select the option “By Case No.” &gt;</p> <p>Input Case No. &gt;</p> <p><i>[Note: PA may also conduct search by using the search criteria <u>case year</u>.</i></p> <p>Select the option “By Case No.”&gt;</p> <p>Input Case Year &gt;</p> <p>Select “Court Level”&gt;</p> <p>Select “Comprising Court” &gt; and “Case Type”]</p> <p>Click “SEARCH” &gt;</p>	<p>The “Maintain SA with Case Assignment Right – Search and Add/Remove case(s) to/from SA to administer” screen is displayed</p> 

Step-by-step guide - “Assign court case(s) to OU Account(s) by SA of same branch, including assignment by PA (by case number)”

Item	Process	Related screenshots for reference
24.	<p><b><u>Search result shows in the record table –</u></b></p> <p>Depending on the search criteria entered, the result will then display.</p> <p><b>To delete the existing case assignment record</b></p> <p>For the record which needs to be deleted, tick the checkbox next to the record and click “Delete” &gt;</p>	<p>The search result – “List of SA with rights to administer cases (By Case No.)” screen is displayed</p> 
25.	<p><b><u>Confirmation</u></b></p> <p>A message listing out the number of record(s) of case assignment will be deleted pops-up.</p> <p>Click “OK” to confirm the selection &gt;</p>	<p>A pop-up message screen is displayed</p> 
26.	<p><b><u>Acknowledgement</u></b></p> <p>Click “OK” to complete &gt;</p>	<p>A pop-up message screen is displayed</p> 