

## Assign court case(s) to OU Account(s) by PA/SA (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 PA/SA decides to assign court cases according to case profile (e.g. Personal Injuries Action of the District Court) to designated OU(s), no further link-up of such type of cases individually will be required.
- (2) Assign case by **Case No.** to OU(s) – If PA/SA opts to assign individual cases to designated OUs one by one, the OUs can only access to those particular cases that PA/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 a PA, and the SA assigned with iCMS Role “To link-up case to OU Accounts (all branches)”, by Case Number**<sup>2</sup>; and
- to remove case(s) assigned to OU **by Case Number**.

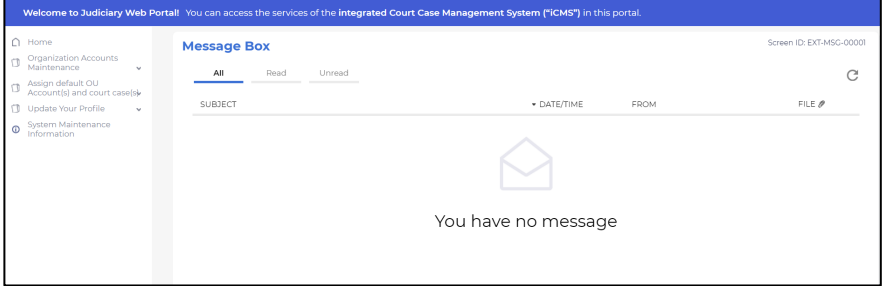
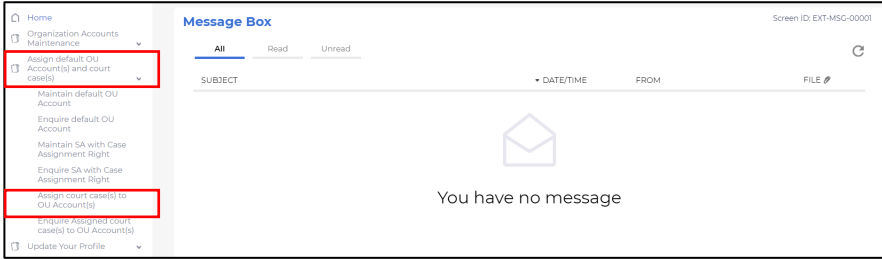
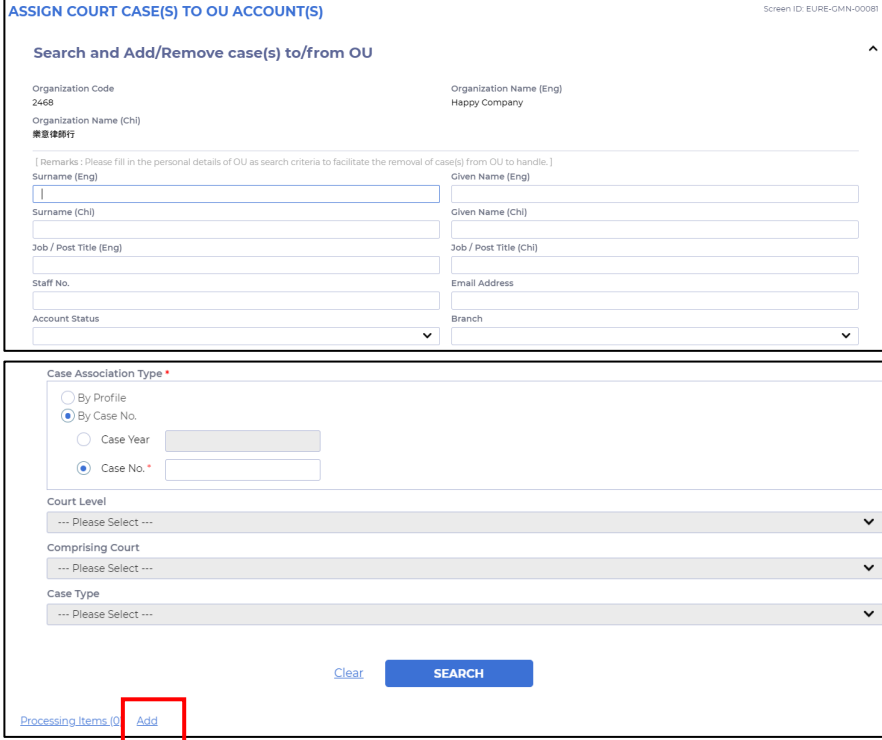
It is for general guidance only. The screenshots provided hereunder are for general illustration purpose and may not be specific for the case/document concerned.

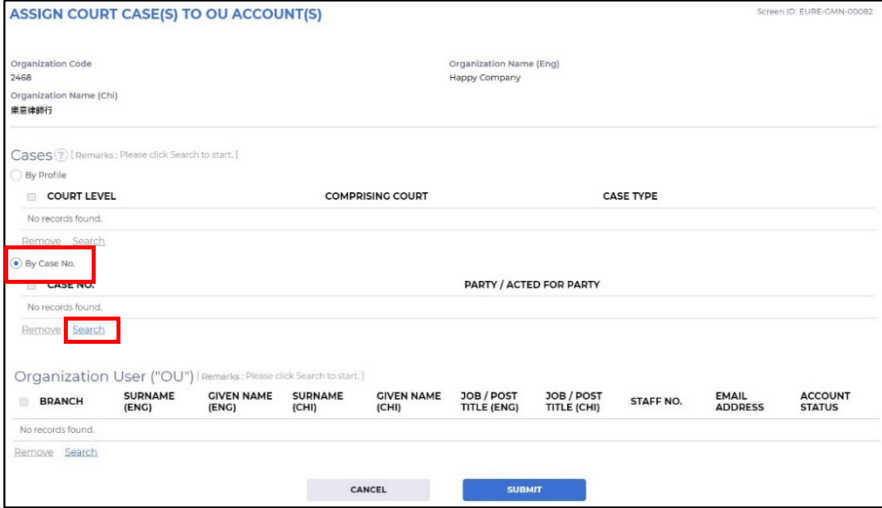
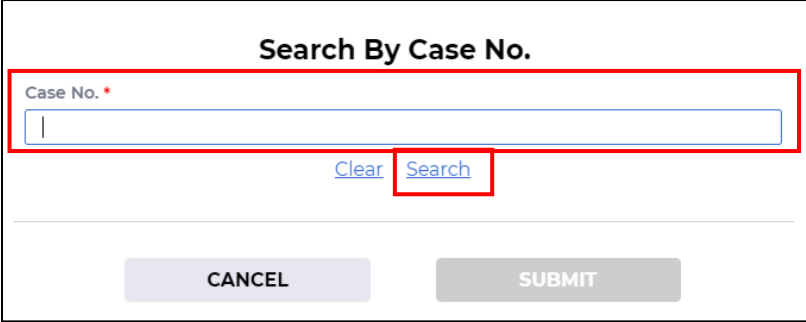
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<sup>1</sup> When assigning court case to OU Account, PA and SA should be cautious to avoid conflict of interest.


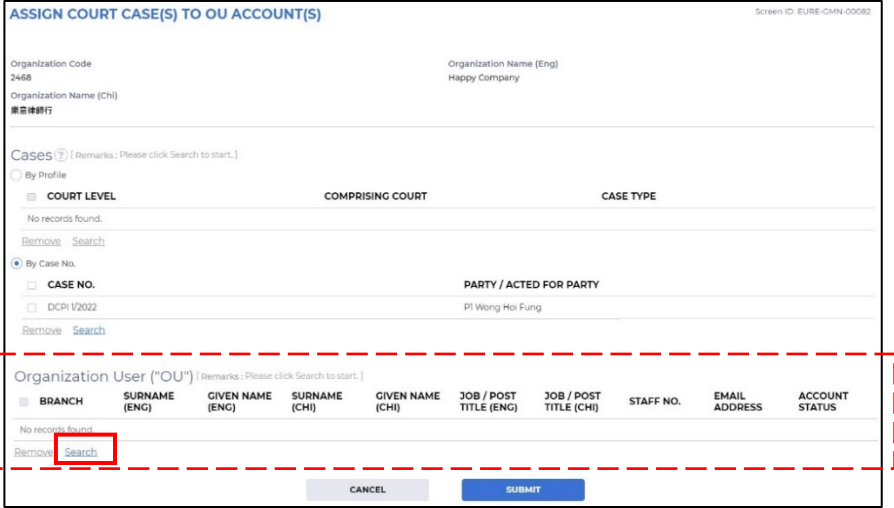
<sup>2</sup> For assignment of cases to OUs by profile, please refer to the step-by-step guide on **Assign court case(s) to OU Account(s) by PA/SA (by profile)** for more information.

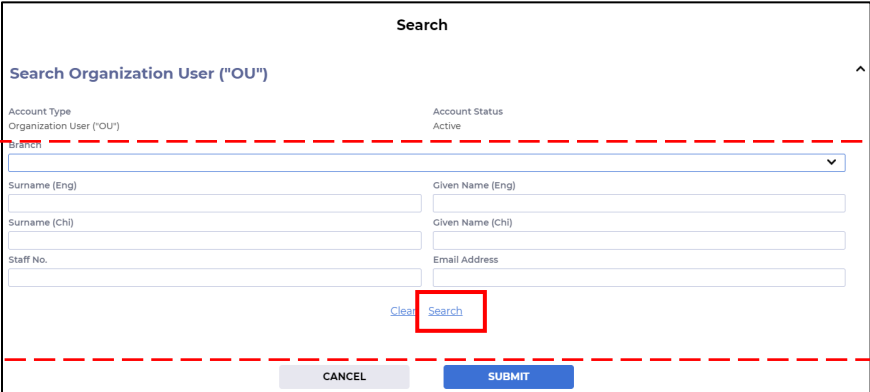
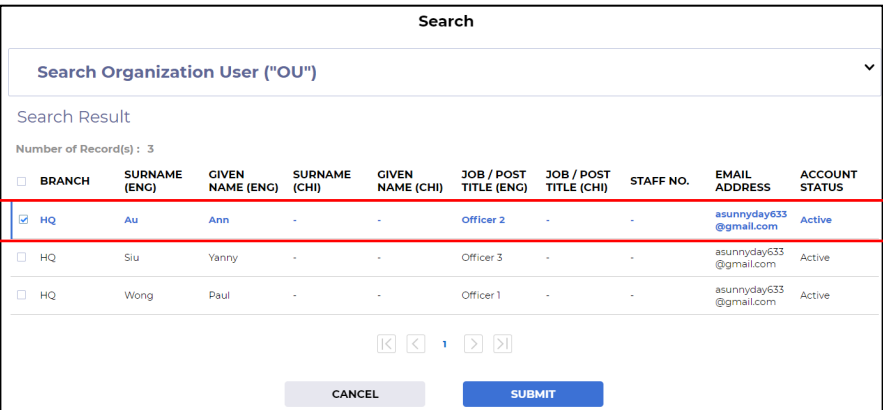
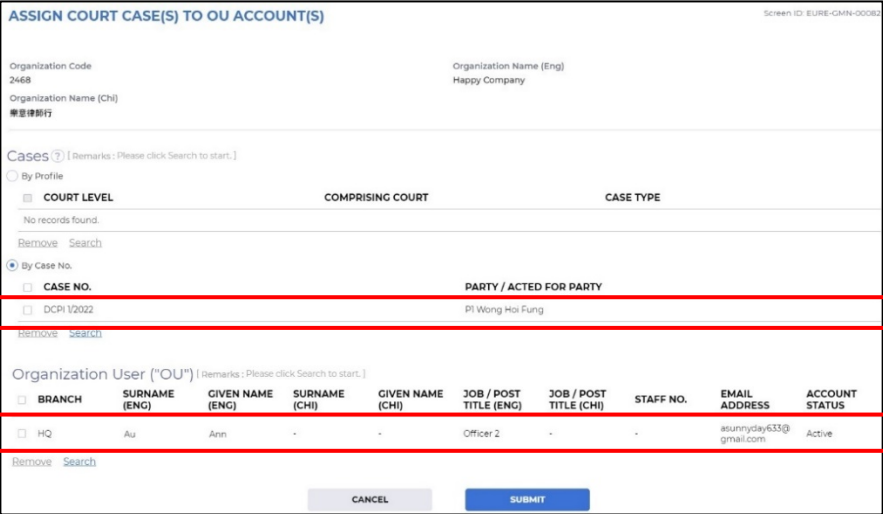
Step-by-step guide - “Assign court case(s) to OU Account(s) by PA/SA (by case number)”

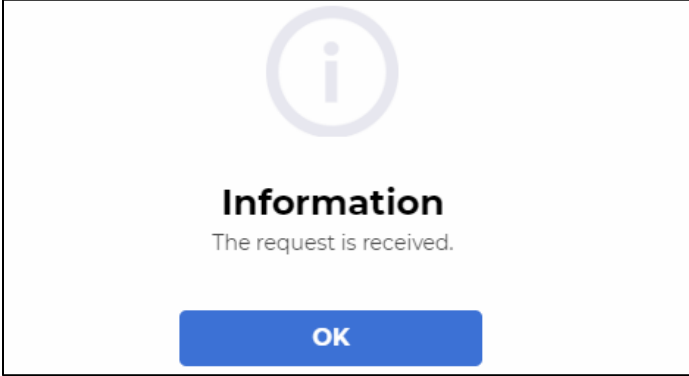
Item	Process	Related screenshots for reference
1.	<p><b><u>Login user account</u></b></p> <p><i>[Note: Please refer to the step-by-step guide <b>Account Login and Logout</b> for information if necessary.]</i></p>	<p>The landing page after logged-in is displayed</p> 
2.	<p><b><u>Assign default OU Account(s) and court case(s)</u></b></p> <p>Under Main Menu &gt; Assign default OU Account(s) and court case(s) &gt;</p> <p>Select Assign court case(s) to OU Account(s) &gt;</p>	
<b>Add Case(s) to OU (by case number)</b>		
3.	<p><b><u>Assign court case(s) to OU Account(s)</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 12 to 16 for procedure on removal of assigned case(s) (by case number) from OU(s).]</i></p>	<p>The “Assign court case(s) to OU Account(s)” screen is displayed</p> 

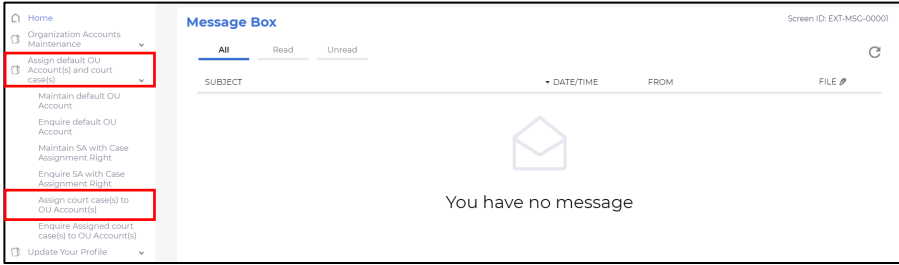
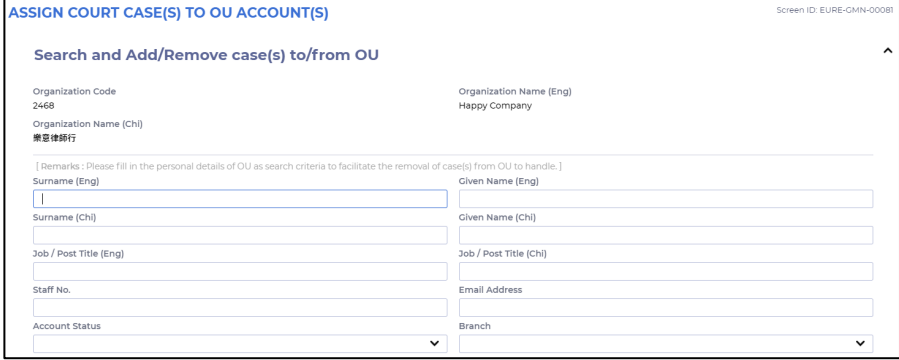
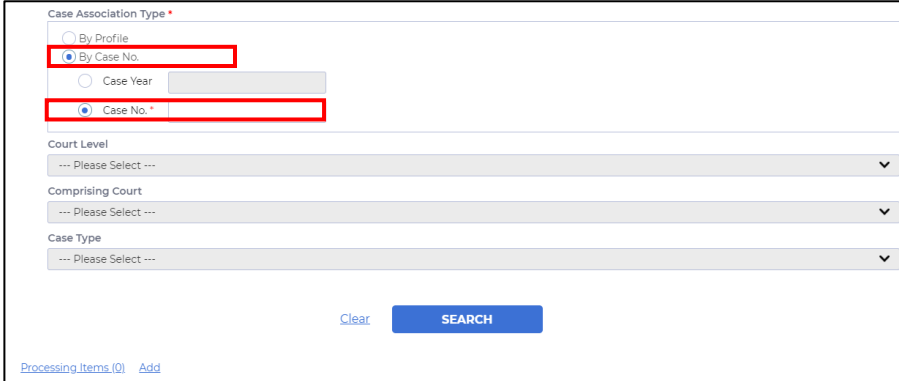
Item	Process	Related screenshots for reference
<b>NOTE</b>		By default, the maximum number of OUs linked up with each case party is ten. A PA may raise request to change the setting by using the function “Request change of Organization Configuration” <sup>3</sup> .
4.	<p><b><u>Assign cases to OU by Case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

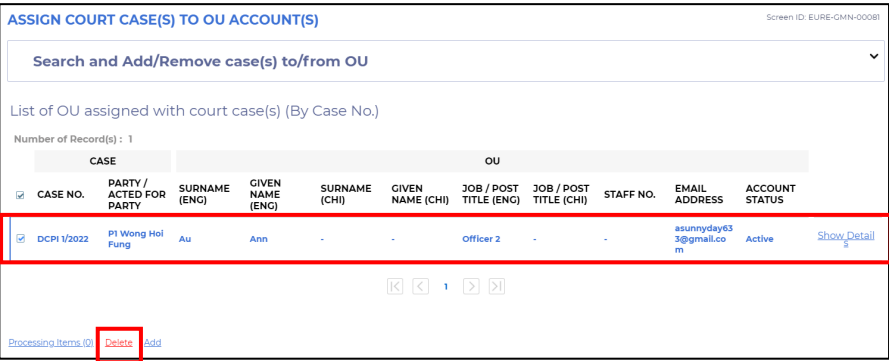
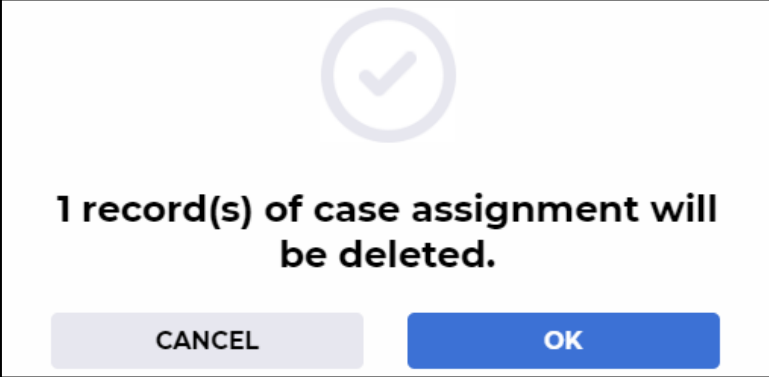
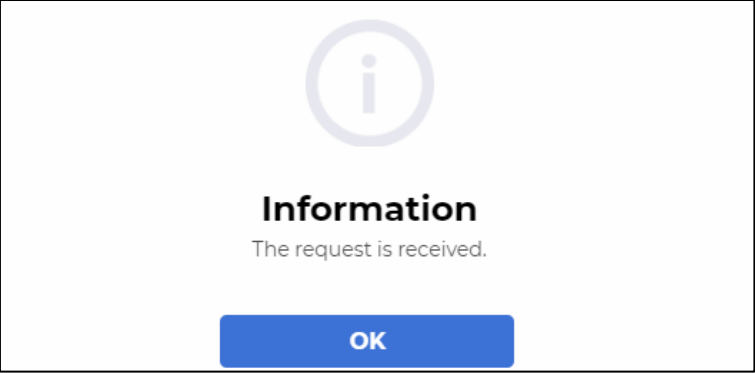
<sup>3</sup> Please refer to the step-by-step guide **Request change of organization configuration** for more information.

Item	Process	Related screenshots for reference
6.	<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> 
NOTE	<p>PA/SA may add more cases (up to ten) for assignment to OU(s) by repeating Items 4 to 6.</p>	
7.	<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> 

Item	Process	Related screenshots for reference																																								
8.	<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> 																																								
9.	<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: PA/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"> <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>-</td> <td>Officer 2</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>-</td> <td>Officer 3</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>-</td> <td>Officer 1</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
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10.	<p><b><u>Confirm the options selected</u></b></p> <p>Check the case no. selected in Item 6 and the OU(s) selected in Item 9</p> <p>Then click “SUBMIT” &gt;</p>	<p>All the selected options is displayed</p> 																																								

Item	Process	Related screenshots for reference
11.	<p><b><u>Acknowledgement</u></b></p> <p>Click “OK” to complete &gt;</p>	<p>A pop-up message screen is displayed</p> 

Item	Process	Related screenshots for reference
<b>Remove Case(s) from OU (by case number)</b>		
12.	<p><b><u>Assign default OU Account(s) and court case(s)</u></b></p> <p>Under Main Menu &gt; Assign default OU Account(s) and court case(s) &gt; Select Assign court case(s) to OU Account(s) &gt;</p>	<p>The landing page of PA or SA Account is displayed</p> 
13.	<p><b><u>Search existing case assignment record with OU - by case no.</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 OU) to narrow down the search result.]</i></p> <p>Select the option “By Case No.” &gt; Input Case No. &gt;</p> <p><i>[Note: PA/SA may also conduct search by using the search criteria <u>case year</u>.</i></p> <p>Select the option “By Case No.” &gt; Input Case Year &gt; Select “Court Level” &gt; Select “Comprising Court” &gt; and “Case Type”]</p> <p>Click “SEARCH” &gt;</p>	<p>The “Assign court case(s) to OU Account(s) – Search and Add/Remove case(s) to/from OU” screen is displayed</p>  <p>Scrolling down...Search by Case No.</p> 

Item	Process	Related screenshots for reference
<p>14.</p>	<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 OU assigned with court case(s) (By Case No.)” screen is displayed</p>  <p>The screenshot shows a web interface titled "ASSIGN COURT CASE(S) TO OU ACCOUNT(S)". Below the title is a search bar with the text "Search and Add/Remove case(s) to/from OU". Underneath is a section titled "List of OU assigned with court case(s) (By Case No.)" with "Number of Record(s) : 1". A table follows with columns for CASE NO., PARTY / ACTED FOR PARTY, SURNAME (ENG), GIVEN NAME (ENG), SURNAME (CHI), GIVEN NAME (CHI), JOB / POST TITLE (ENG), JOB / POST TITLE (CHI), STAFF NO., EMAIL ADDRESS, and ACCOUNT STATUS. One record is listed: DCPI 1/2022, PI Wong Hoi Fung, Au, Ann, Officer 2, and asunnyday633@gmail.com. A red box highlights the first row of the table. Below the table is a "Processing Items (0)" section with a red box around the "Delete" button.</p>
<p>15.</p>	<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>  <p>The screenshot shows a confirmation dialog box with a checkmark icon at the top. The text reads "1 record(s) of case assignment will be deleted." At the bottom, there are two buttons: "CANCEL" and "OK".</p>
<p>16.</p>	<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 dialog box with an information icon at the top. The text reads "Information The request is received." At the bottom, there is a single "OK" button.</p>