Create Organization User (OU) Account and set up iCMS functional roles

Account types

There are three types of sub-accounts for individuals within an Organization Account, namely

- (a) PA Account;
- (b) SA Account; and
- (c) OU Account.

After completion of the account activation process, holders of PA Account, or SA Account, may open OU Account(s) assigned with (i) different branch codes¹; and (ii) respective rights (i.e. iCMS Roles), to carry out actual electronic transactions with the e-Courts. Alternatively, a PA and a SA, may create an OU Account for himself/herself if he/she wishes to conduct electronic transactions on his/her own.

iCMS role of an OU

By default, an OU is only able to maintain one's own profile.

Unless there is assignment of iCMS Role(s) to an OU, the related OU is unable to perform any electronic transaction with the e-Courts. Details of the iCMS Roles for the OUs are set out at <u>Appendix II</u>.

iCMS role: Court Case Processing (Full access)

Taking an OU Account holder with the iCMS roles and functions in the District Court as an example, an OU with the iCMS role "Court Case Processing (Full access)" is able to file/send documents online and perform all iCMS functions (including conducting inspection of filed documents and other electronic services). By means of the Message Box on the iCMS, the OUs will receive messages and documents from the court cases that their accounts are linked-up with.

PA, or SA, may also create OU Accounts with iCMS role "Court Case Processing". The main difference between the two iCMS roles is that, OU Accounts with iCMS role "Court Case Processing" will not have access to application for certification of translation service, or be able to make electronic payment separately.

OUs with iCMS roles to "Conduct Other Electronic Services" and "Make Electronic Payment" cannot file/send documents by means of the iCMS even if a court case is linked up these OU accounts.

¹ Please refer to the step-by-step guide **Maintain Branch** for more information.

This step-by-step guide outlines the general process required <u>to create an OU account by a PA, or by a SA,</u> <u>and set up iCMS functional roles</u>. 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. | Login user account | The landing page after logged-in is displayed | | | |
| | by-step guide Account Login and Logout for information if necessary.] | Welcome to Judiciary Web Portall. You can access the services of the integrated Court Case Management System (PCMS*) in this portal. Image: Comparization Accounts Organization Accounts Adding data Counts Update Your Polifie System Maintenance Organization Accounts System Maintenance VibrandCon Maintenance System Maintenance VibrandCon Maintenance System Maintenance System Maintenance VibrandCon System Maintenance System Maintenance VibrandCon System Maintenance Vou have no message | | | |
| 2. | Organization Accounts Maintenance Under Main Menu > Organization Accounts Maintenance > Select "Create OU Account" ² > | Here Screen ID: DCT-MSC-00001 Operation Att | | | |

 $^{^{2}}$ The first OU Account created by the PA will be automatically set as the default OU Account for the Organization to receive case-specific messages of court cases which have not been assigned to any OU Account. For details, please refer to step-by-step guides on **Maintain default OU Account** and **Enquire default OU Account**.

| Item | Process | Related screenshots for reference | | | | |
|------|--|---|---|--|--|--|
| 3. | Input personal particulars of the OU | The "Create OU Account" screen is displayed | | | | |
| | Select an appropriate Title > | CREATE OU ACCOUNT Screen ID EUAA-CAN+00 | | | | |
| | Input Surname (Eng) ³ and Given Name (Eng) ³ > | Notice Please fill in the information in English except fields marked as "Chi'(should be filled in Chinese). Fields marked with an asterisk(!) are mandatory. Organization Code | | | | |
| | Input Surname (Chi) and Given Name (Chi) > | 268 Gruparization Name (Eng) Happy Company Organization Name (Chi) #55 #967 Account Type Organization User ("OU") | | | | |
| | Select an appropriate | | | | | |
| | Identification Document | Title * | ~] | | | |
| | Type > | Surname (Eng) * ⑦ | Given Name (Eng) * ? | | | |
| | [Note: If the option "Other | Surname (Chi) | Given Name (Chi) | | | |
| | Identity Document" is selected, | Identification Document Type * | V | | | |
| | please fill in the textbox under | Identification Document Type (Others) (Eng) | Identification Document Type (Others) (Chi) | | | |
| | the field "Identification Document Type (Others) (Eng)/(Chi)" >] | | | | | |
| | Input Identification Document No. > | [Scroll down] | | | | |
| | Input Job/Post Title (Eng) > | Identification Document No. (First 4 Characters) * | | | | |
| | Lagart Staff No. > | Job / Post Title (Eng) * | Job / Post Title (Chi) | | | |
| | Input Stall No. > | Staff No. | | | | |
| | Input Tolophone No 3 | Telephone No. * (?) | Fax No. | | | |
| | input Telephone No." > | Email Address * | Mobile Phone No. | | | |
| | Input Fax No. > | Effective Start Date (DD/MM/YYYY) | Effective End Date (DD/MM/YYYY) * | | | |
| | Input Email Address ⁴ > | HQ - Headquarters | ~ | | | |
| | Input Mobile Phone No. > | | | | | |
| | Click the Date Picker to select an Effective End Date (DD/MM/YYYY) ⁵ > | | | | | |
| | Select the appropriate Branch ¹ > | | | | | |
| | | | | | | |

³ This information will be used as one of the answers to the security questions for Account Activation process. ⁴ The related email address will be used for receiving messages from the iCMS.

⁵ The Effective End Date represents the end date (inclusive) of an account to be able to access to the system.

| Item | Process | Related screenshots for reference | |
|------|--|--|---|
| | For assigning an iCMS role to an OU, choose the appropriate Court Level > | [Scroll down] | |
| | Pick the appropriate Group > | | |
| | Select the respective Role⁶ > | Group / Role [Remarks : Please click Add to confirm the selected iCMS re | ole.] |
| | [Note: To select the Role, you may tick the checkbox next to a specific role or you may tick the checkbox next to the search bar above the drop-down list of "Role" to select all roles > | Court Level District Court Croup Law Firms Cour Eunctions Add Court Cour | rt Case Processing (Full access) × × p nduct Other Electronic Services urt Case Processing urt Case Processing (Full access) ke Electronic Payment |
| | Click "Add" and one new entry will appear at the Group / Role table > | The list of function(s) of the Role "Co access)" is displayed | urt Case Processing (Full |
| | | Function | S |
| | [Note: You may click "Functions" to view the list of functions of selected "Role"] > | Group Role Law Firms Cou | e rt Case Processing (Full access) |
| | | | |
| | | Certification of Translation Service | |
| | | Conduct Document Reference Number Checking | J |
| | | Execution and Service | |
| | | Inspect Cause Book | |
| | | Inspect Filed Document | |
| | | Make Electronic Payment | |
| | | Send Document(s) | |
| | | Verity Document Image | i |
| | | CLOSE | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

⁶ Based upon the internal policy of the Organization, PA/SA may assign different iCMS Role(s) to each OU Account.

| Item | Process | Related screenshots for reference | | | | |
|------|--|--|-------|--|--|--|
| | For viewing the functions of the selected Role again, click "Show" > | Group / Role [Remarks : Please click Add to confirm the selected iCMS role.] Court Level District Court Group Role | | | | |
| | Select Preferred Language (for screen display) > | Eunctions Add Output CROUP ROLE Functions Functions District Court Law Firms Court Case Processing (Full access) | | | | |
| | Click "SUBMIT" > | Delete Preferred Language (For screen display) | | | | |
| | | Reset Password Re-activate Account Suspend CANCEL SUBMIT | | | | |
| 4. | Acknowledgement | A pop-up message screen is displayed | | | | |
| | Click "OK" to finish the process | i | | | | |
| | Repeat Items 2 to 4 to create other OU account(s) if so requires | Information Account has been created. Notification email has been sent. | | | | |
| | | ок | | | | |
| NOTE | The account holder will receive step guide Activate a PA acco Organization User (OU) Accou | ve Notification via the registered email address. Please refer to ste Sount (procedures applicable to Secondary Administrator (SA) & unts) for more information. | p-by- | | | |

Appendix II

Summary of iCMS Roles & Functions in the District Court for an OU Account holder

| iCMS Roles | Court Case | Court Case | Conduct | Make |
|--|---------------|--------------|--------------|------------|
| | Processing | Processing | Other | Electronic |
| | (Full access) | C | Electronic | Payment |
| Functions | | | Services | |
| Electronic Filing | | \checkmark | | |
| Send Document(s) | | | | |
| Inspection of Document | | \checkmark | \checkmark | |
| Inspect Filed Document Inspect Cause Book | | | | |
| T | | | | |
| Bailiff related services | | | | |
| Certification of Translation | | | | |
| Service | | | | |
| Submit Application Maintain Draft Application Resubmit Application Download Certified Documents Refund Application | | | | |
| Other Electronic Services | | | | |
| Conduct Document Reference Number Checking Verify Document Image | | | | |
| Make Electronic Payment | | | | |

Summary of iCMS Roles & Functions in the Magistrates' Courts for an OU Account holder

| iCMS Roles | Basic Access | Basic Access |
|--|--------------|---------------|
| | | (Without Case |
| Functions | | Function) |
| Electronic Filing | \checkmark | |
| Case Document Submission | | |
| Criminal Case | \checkmark | |
| Submit Application for Summons to Witness | | |
| Inspection of Document | \checkmark | \checkmark |
| Electronic Application for Court Records Enquire Electronic Application for Court Records | | |
| Case Enquiry | \checkmark | |
| Enquire Summons and Notice Enquire Interpreter Request Status | | |
| Certification of Translation | \checkmark | |
| Service | | |
| Submit Application Maintain Draft Application Resubmit Application Download Certified Documents Refund Application | | |
| Other Electronic Services | | |
| Conduct Document Reference Number Checking | | |
| Make Electronic Payment | \checkmark | \checkmark |

Summary of iCMS Roles & Functions in the Small Claims Tribunal for an OU Account holder

| iCMS Roles | Court Case Processing (Full access) | Court Case Processing | Conduct Other Electronic | Make Electronic Payment |
|--|---|--------------------------|--------------------------------|-------------------------------|
| Functions | | | Services | |
| Electronic Filing | | | | |
| Send Document(s) | | | | |
| Inspection of Document | | \checkmark | \checkmark | |
| Inspect Filed Document Inspect Cause Book | | | | |
| Bailiff Related Services | | | | |
| > Execution | | | | |
| Certification of Translation Service | | | | |
| Submit Application Maintain Draft Application Resubmit Application Download Certified Documents Refund Application | | | | |
| Other Electronic Services | | | \checkmark | |
| Conduct Document Reference Number Checking Verify Document Image | | | | |
| Make Electronic Payment | | | | \checkmark |

Summary of iCMS Roles & Functions in the High Court for an OU Account holder

| iCMS Roles Functions | Court Case Processing (Full access) | Court Case Processing | Conduct Other Electronic Services | Make Electronic Payment |
|---|---|--------------------------|--|-------------------------------|
| Electronic Filing | | | | |
| Send Document(s) | | | | |
| Inspection of Document | \checkmark | \checkmark | \checkmark | |
| Inspect Filed Document Inspect Cause Book | | | | |
| Bailiff related services | | | | |
| Certification of Translation Service Submit Application Maintain Draft Application Resubmit Application | \checkmark | | \checkmark | |
| Download Certified Documents Refund Application | | | | |
| Other Electronic Services | \checkmark | \checkmark | \checkmark | |
| Conduct Document Reference Number Checking | | | | |
| Make Electronic Payment | | | | \checkmark |
| Judiciary Cloud | | | | |