Create Secondary Administrator (SA) 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, the holder of PA Account may open SA Account(s) assigned with (i) different branch codes[1]; and (ii) respective rights (i.e. iCMS Roles), to assist in the day-to-day administration and management of OU Accounts of an organization. Details of the iCMS Roles for the SAs and related administrative rights to assign court cases to the OU Accounts are set out at Appendix I.

Alternatively, a PA may choose not to create any SA Account for the organization.

iCMS role of an SA

By default, apart from maintaining one's own profile, an SA is able to

- create OU Account of the same branch and maintain the OU's profile;

- link up case to OU Account of the same branch **AFTER** the related case is assigned by PA to this SA;

- generate Account Login Report and Account Status Report for SA and/or OU Accounts under the same branch

and perform some enquiry functions including

- Enquire Organization Configuration;

- Enquire Branch;

- Enquire default OU Account; and

- Enquire Assigned court case(s) to OU Account(s).

iCMS role: To link-up case to OU Accounts (all branches)

To assist in carrying out the case assignment work, PA can assign the iCMS role "To link-up case to OU Accounts (all branches)" to the suitable SA(s) during the creation of SA account; so that the relevant SA(s) can perform account link-up to the OUs of the Organization once a court case is linked up with the Organization. **No further assignment is required by PA**.

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

PA may also create an SA account without any iCMS role, but add all available case profiles to this SA to perform case assignment work[2]. As such, this SA can perform account link-up to the OUs of the same branch once a court case of the accessible case profiles is linked up with the Organization. Yet, this SA cannot assign cases to OUs of other branches.

iCMS role: To link-up case to OU Accounts (same branch)

To assist in carrying out the case assignment work, PA can also assign the iCMS role "To link-up case to OU Accounts (same branch)" to the suitable SA(s) during the creation of SA account; so that the relevant SA(s) can perform account link-up to the OUs of the same branch of the Organization once a court case is linked up with the Organization. **No further assignment is required by PA**.

Unlike the iCMS role of "To link-up case to OU Accounts (all branches)" this role enables the SA(s) to assign cases to OUs of the same branch only.

iCMS role: To create SA Account

If an SA is equipped with the iCMS Role to create SA, the related SA is able to open SA Accounts for the branch to share out the day-to-day account management tasks. In any event, the related SA will only be able to manage OU Accounts of the same branch including the SA Account(s) he/she opened.
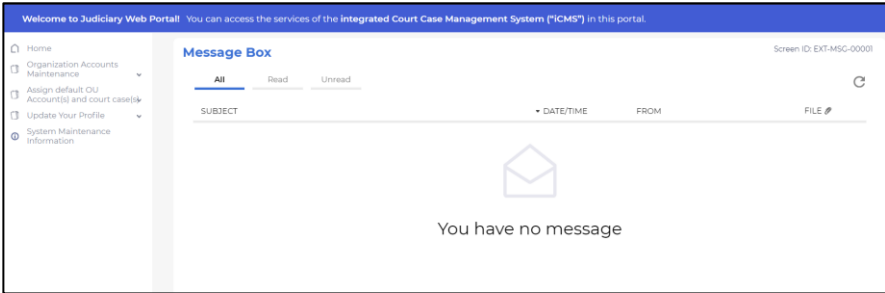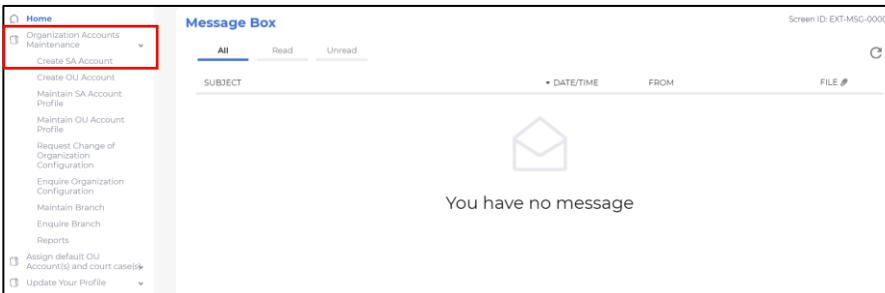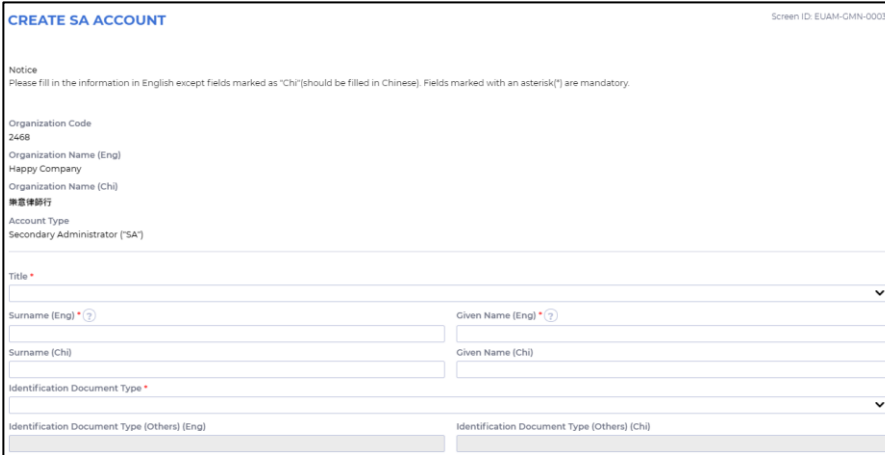
iCMS role: To maintain default OU Account

PA may delegate SA to update and maintain the default OU Account(s)[3] for receiving case-specific messages of court cases which have not been assigned to any OU Account.

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[2] Please refer to the step-by-step guide **Assign court case(s) to OU Account(s) by SA of the same branch, including assignment by PA (by profile)** for more information
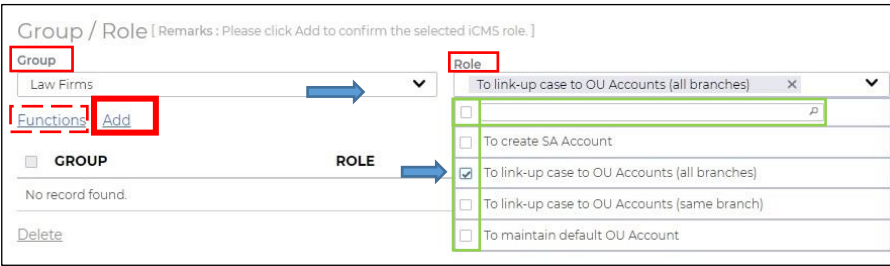
[3] Please refer to step-by-step guides on **Maintain default OU Account** and **Enquire default OU Account**.

This step-by-step guide outlines the general process required **to create an SA Account by a PA, and by the SA assigned with the related iCMS Role,** and set up iCMS functional roles. 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.

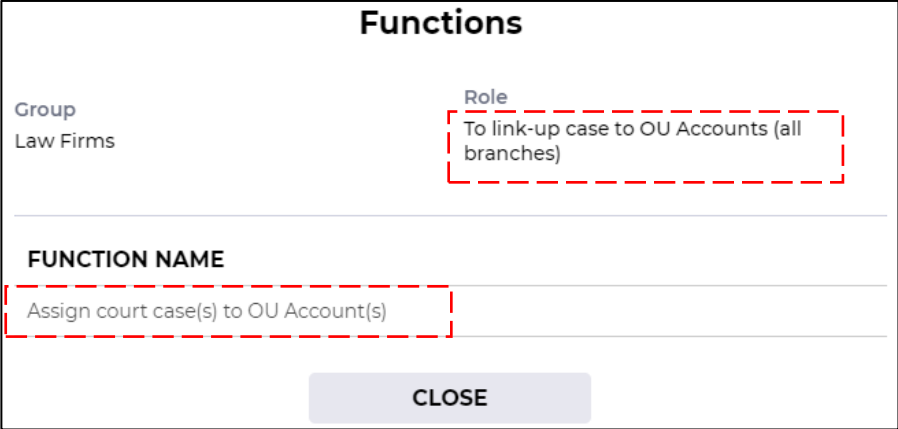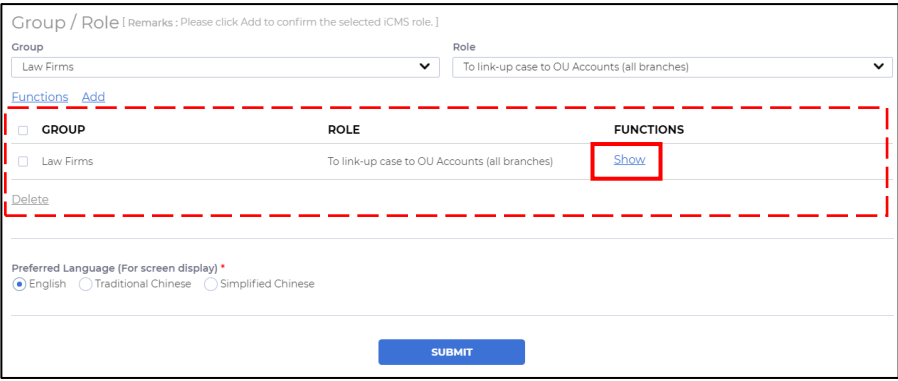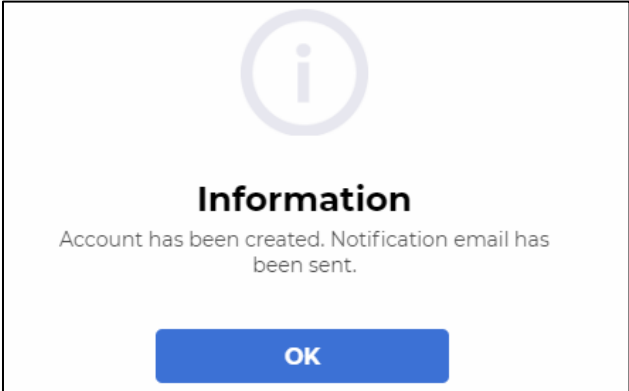| Item	Process	Related screenshots for reference
1.	**Login user account** *[Note: Please refer to the step-by-step guide **Account Login and Logout** for information if necessary.]*	The landing page after logged-in is displayed *[screenshot of Judiciary Web Portal Message Box]*
2.	**Organization Accounts Maintenance** Under Main Menu > Organization Accounts Maintenance > Select "Create SA Account" >	*[screenshot showing the Organization Accounts Maintenance menu with "Create SA Account" highlighted]*
3.	**Input personal particulars of the SA** Select an appropriate **Title** > Input **Surname (Eng)**[4] and **Given Name (Eng)**[4] > Input Surname (Chi) and Given Name (Chi) > Select an appropriate **Identification Document Type** > *[Note: If the option "Other Identity Document" is selected, please fill in the textbox under the field "Identification*	The "Create SA Account" screen is displayed *[screenshot of the CREATE SA ACCOUNT screen]*

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[4] This information will be used as one of the answers to the security questions for Account Activation process.

Item	Process	Related screenshots for reference
	Document Type (Others) (Eng)/(Chi)" >]	
	Input **Identification Document No.** >	*[Scroll down]*
	Input **Job/Post Title** (Eng) >	
	Input Staff No. >	
	Input **Telephone No.[4]** >	
	Input Fax No. >	
	Input **Email Address[5]** >	
	Input Mobile Phone No. >	
	Click the Date Picker to select an **Effective End Date** (DD/MM/YYYY)[6] >	
	Select the appropriate **Branch[1]** >	*[Scroll down]*
	For assigning an iCMS role to an SA, pick the appropriate **Group** >	
	Select the respective **Role** >	
	[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 >]	
	Click "Add" and one new entry will appear at the Group / Role table >	The list of function(s) of the Role "To link-up case to OU Accounts (all branches)" is displayed
	[Note: You may click "Functions" to view the list of functions of selected "Role"] >	

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[5] The related email address will be used for receiving messages from the iCMS.

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

Item	Process	Related screenshots for reference
	For viewing the functions of the selected Role again, click "Show" >

Select **Preferred Language** (for screen display) >

Click "SUBMIT" > | **Functions**

Group
Law Firms

Role
To link-up case to OU Accounts (all branches)

FUNCTION NAME
Assign court case(s) to OU Account(s)

CLOSE

Group / Role [Remarks : Please click Add to confirm the selected iCMS role.]
Group
Law Firms
Role
To link-up case to OU Accounts (all branches)
Functions Add

| GROUP | ROLE | FUNCTIONS |
| Law Firms | To link-up case to OU Accounts (all branches) | Show |
Delete

Preferred Language (For screen display) *
⦿ English ◯ Traditional Chinese ◯ Simplified Chinese

SUBMIT |
| 4. | **Acknowledgement**

Click "OK" to finish the process

Repeat Items 2 to 4 to create other SA account(s) if so requires | A pop-up message screen is displayed

ⓘ

Information
Account has been created. Notification email has been sent.

OK |
| **NOTE** | *The account holder will receive Notification via the registered email address. Please refer to step-by-step guide **Activate a PA account (procedures applicable to Secondary Administrator (SA) & Organization User (OU) Accounts)** for more information.* | |

<p align="right"><u>**Appendix I**</u></p>

Summary of iCMS Roles for an SA Account holder and related rights to assign court cases to the OUs[7]

	Scenarios	Administrative rights granted by PA to SA -	
		to assign case(s) **by Profile** (i.e. case types)	to assign case(s) **by Case No.**
1.	<u>General SA</u> For example, • SA_A is created under Branch A; • SA_B is created under Branch B; and • <u>No</u> iCMS Role is added to either SA_A or SA_B	SA_A may select to assign case(s) to the OUs **of the same branch** (i.e. OU_{A1}, OU_{A2}, etc.) ➢ by Profile or ➢ by Case No.	SA_B can <u>only</u> assign the particular case to the OUs **of the same branch** (i.e. OU_{B1}, OU_{B2}, etc.) <u>after</u> the related case is assigned by the PA
		Points to Note	
		• Automatic linking-up of cases under the selected Profile to OUs of the same branch thereafter • Do not support to de-linking a specific case from an OU	• Accurate control • Need to perform case link-up individually
	Additional Information *Example (1):* *If SA_A assigns case(s) to OU_{A1} with the **Profile** of Personal Injuries Action (PI cases), which means there will be an **automatic link-up of cases under the Profile** of PI cases to OU_{A1}.* *In other words, whenever there are cases under the Profile of PI cases linked up with this Organization Account, OU_{A1} can conduct electronic transactions with the e-Courts relating to those cases.* *Example (2)* *SA_B can assign case(s) to OU_{B1} by the **Case No.**, e.g. DCPI 2022/2022, after PA has assigned the said case to SA_B. However, SA_B cannot link up DCPI 2022/2022 to OU_{A1} as OU_{A1} is NOT of the same branch.*		
2.	<u>SA with optional Role</u> "to link-up case to OU Accounts (all branches)" • SA_C is created under Branch C; and • with an iCMS optional Role added	➢ NO further assignment of administrative rights by PA is required. ➢ SA_C can link up **ALL cases** to OUs **of all branches** either by **Profile** or by **Case No.**	
		Points to Note	
		SA_C will be able to assign cases to all OUs like a PA	
	Additional Information *Example (3)* *SA_C may choose to assign cases either by Profile or by Case No. to OU_{A1} and OU_{B1} if so requires.*		

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[7] By default, <u>no</u> SAs can assign cases to OUs unless the respective administrative rights (either by Case Profile or Case No.) is granted by PA. For assigning administrative rights by PA to an SA, please refer to step-by-step guides on **Assign default OU Account(s) and court case(s)** for more information.

	Scenarios	Administrative rights granted by PA to SA -	
		to assign case(s) **by Profile** (i.e. case types)	to assign case(s) **by Case No.**
3.	SA with optional Role "to link-up case to OU Accounts (same branch)" • SA$_D$ is created under Branch D; and • with an iCMS optional Role added	➢ NO further assignment of administrative rights by PA is required ➢ SA$_D$ can link up **ALL cases** to OUs **of Branch D only** either by **Profile** or by **Case No.**	
4.	SA with optional Role "to create SA Account" • SA$_E$ is created under Branch E; and • with an iCMS optional Role is added	*Same arrangement as per scenario 1*	

Additional Menu Items available for SA$_E$

- Create SA Account
- Maintain SA Account Profile

Any SA(s) created by SA$_E$ will inherit the same branch code from SA$_E$

Additional Information
Difference between an SA Account opened by a PA and by an SA assigned with the Role to create SA Account

	SA Account opened	
	By a PA	*By an SA with the related iCMS Role*
Branch Code	*Can be assigned with any branch code*	*Will inherit the same branch code from the creating SA*
Availability of iCMS optional Roles	*4 optional Roles to choose:* • *To link-up case to OU Accounts (all branches)* • *To link-up case to OU Accounts (same branch)* • *To create SA Account* • *To maintain default OU Account*	*3 optional Roles to choose:* • *To link-up case to OU Accounts (all branches)* • *To link-up case to OU Accounts (same branch)* • *To maintain default OU Account*

	Scenarios	Administrative rights granted by PA to SA -	
		to assign case(s) **by Profile** (i.e. case types)	to assign case(s) **by Case No.**
5.	SA with optional Role <u>"to maintain default OU Account"</u>[3] • SA_F is created under Branch F; and • with an iCMS optional Role is added	*Same arrangement as per scenario 1*	
	Additional Menu Item • Maintain default OU Account		