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 codes¹; 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 <u>Appendix I</u>.

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 <u>case</u> 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**.

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 work². 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.

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.

iCMS role: To maintain deposit account

By default, an SA is able to

- enquire transaction details and balance of deposit sub-account of branch assigned by the PA; and
- top up deposit sub-account of the same branch.

PA can assign the iCMS role "Deposit Account - SA (All Branches)" to the suitable SA(s) during the creation of SA account, so that the relevant SA(s) can

- top up deposit account and sub-accounts of all branches;
- transfer deposit amount among deposit account and sub-accounts of all branches within the same Organization Account; and
- enquire transaction details and balances of deposit account and sub-accounts of all branches.

This step-by-step guide outlines the general process required <u>to create an SA Account by a PA, and by the SA</u> <u>assigned with the related iCMS Role</u>, 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	The landing page after logged-in is displayed		
	[Note: Please refer to the step- by-step guide Account Login and Logout for information if necessary.]	Welcome to Judiciary Web Portal You can access the services of the integrated Court Case Management System (*CM5*) in this portal. Image: Constraint of the integrated Court Case Management System (*CM5*) in this portal. Screen ID: EXT-MSC-0000 Image: Constraint of the integrated Court Case Management System (*CM5*) in this portal. Screen ID: EXT-MSC-0000 Image: Constraint of the integrated Court Case Management System (*CM5*) in this portal. Screen ID: EXT-MSC-0000 Image: Constraint of the integrated Court Case Management System (*CM5*) in this portal. Screen ID: EXT-MSC-0000 Image: Constraint of the integrated Court Case Management System (*CM5*) in this portal. Screen ID: EXT-MSC-0000 Image: Constraint of the integrated Court Case Management System (*CM5*) in this portal. Image: Constraint of the integrated Court Case Management System (*CM5*) in this portal. Image: Constraint of the integrated Court Case Management System (*CM5*) in this portal. Image: Constraint of the integrated Court Case Management System (*CM5*) in this portal. Image: Constraint of the integrated Court Case Management System (*CM5*) in this portal. Image: Constraint of the integrated Court Case Management System (*CM5*) in this portal. Image: Constraint of the integrated Court Case Management System (*CM5*) in this portal. Image: Constraint of the integrated Court Case Management System (*CM5*) in this portal. Image: Constraint of the integrated Court Case Management Sys		
2.	Organization Accounts Maintenance			
	Under Main Menu > Organization Accounts Maintenance > Select "Create SA Account" >	Image: Message Box Sorren ID: BCT-MSC-00001 Called SA Account Image: Sorren ID: BCT-MSC-00001 Image: Sorren ID: BCT-MSC-00001 Maintain SA Account Image: Sorren ID: BCT-MSC-00001 Image: Sorren ID: BCT-MSC-00001 Maintain SA Account Image: Sorren ID: BCT-MSC-00001 Image: Sorren ID: BCT-MSC-00001 Beguard Charger ID Sorren ID: BCT-MSC-00001 Image: Sorren ID: BCT-MSC-00001 Beguard Charger ID Sorren ID: BCT-MSC-00001 Image: Sorren ID: BCT-MSC-00001 Beguard Charger ID Sorren ID: BCT-MSC-00001 Image: Sorren ID: BCT-MSC-00001 Beguard Charger ID Beguard Charger ID Sorren ID: BCT-MSC-00001 Beguard Charger ID Beguard Charger ID Sorren ID: BCT-MSC-00001 Beguard Charger ID Beguard Charger ID Sorren ID: BCT-MSC-00001 Beguard Charger ID Beguard Charger ID Sorren ID: BCT-MSC-00001 Beguard Charger ID Beguard Charger ID Sorren ID: BCT-MSC-00001 Beguard Charger ID Beguard Charger ID Sorren ID: BCT-MSC-00001 Beguard Charger ID Beguard Charger ID Sorren ID: BCT-MSC-00001 Beguard Charger ID Beguard Charger ID Sorren ID: BCT-MSC-000001 Beguard Charger ID		
3.	Input personal particulars	The "Create SA Account" screen is displayed		
3.	Input personal particularsof the SASelect an appropriate Title >Input Surname (Eng) ⁴ andGiven Name (Eng) ⁴ >Input Surname (Chi) andGiven Name (Chi) >Select an appropriateIdentification DocumentType >[Note: If the option "OtherIdentity Document" is selected,please fill in the textbox underthe field "Identification	The "Create SA Account" screen is displayed CREATE SA ACCOUNT screen ID EUAA4-OM4-0001 Notice Please fills the information in English except fields marked as "Ch"(bhould be filled in Chinese), Fields marked with an asterisk(") are mandatory. Organization Code 266 266 0rganization Name (Eng) Organization Name (Eng) 8 Page / Company 0 Organization Name (Eng) 8 Secondary Administrator ("SA") • Table * • Secondary Administrator ("SA") • Sumame (Eng) * ① • Identification Document Type * •		

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] Identification Document No. (First 4 Characters) •		
	Input Job/Post Title (Eng) >	3ob / Post Title (Eng) * 3ob / Post Title (Chi)		
	Input Staff No. >	Staff No. Telephone No. * ⑦ Fax No.		
	Input Telephone No. ⁴ >	Email Address * Mobile Phone No.		
	Input Fax No. >	Effective Start Date (DD/MM/YYYY) * - (b) Franch *		
	Input Email Address⁵ >	HQ - Headquarters		
	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 >	Group / Dole (Remarks - Riessa click Add to confirm the selected ICMS role 1		
	[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 >]	Group Role Law Firms To link-up case to OU Accounts (all branches) Functions Add Group To link-up case to OU Accounts (all branches) Functions Add Or create SA Account To create SA Account To link-up case to OU Accounts (all branches) To create SA Account No record found. To link-up case to OU Accounts (all branches) Delete To maintain default OU Account		
	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"] >			

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" >	Role Croup To link-up case to OU Accounts (all branches) FUNCTION NAME Assign court case(s) to OU Account(s) CLOSE CLOSE		
	Select Preferred Language (for screen display) > Click "SUBMIT" >	Croup / Role [Remarks : Please click Add to confirm the selected ICMS role.] Group Role Law Firms To link-up case to OU Accounts (all branches) Eunctions Add CROUP ROLE Functions To link-up case to OU Accounts (all branches) Law Firms To link-up case to OU Accounts (all branches) Delete Preferred Language (For screen display)* • English Traditional Chinese Submit 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		
NOTE	The account holder will receiv step guide Activate a PA acco Organization User (OU) Acco	Notification via the registered email address. Please refer to step-by- bunt (procedures applicable to Secondary Administrator (SA) & unts) for more information.		

Appendix I

	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		
		 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 InformationExample (1):If SAA assigns case(s) to OUA1 with the Profile of Personal Injuries Action (PI cases), which means therewill be an automatic link-up of cases under the Profile of PI cases to OUA1.In other words, whenever there are cases under the Profile of PI cases linked up with this OrganizationAccount, OUA1 can conduct electronic transactions with the e-Courts relating to those cases.Example (2)SAB can assign case(s) to OUB1 by the Case No., e.g. DCPI 2022/2022, after PA has assigned the saidcase to SAB. However, SAB cannot link up DCPI 2022/2022 to OUA1 as OUA1 is NOT of the same branch.				
2.	SA with optional Role"to link-up case to OU Accounts(all branches)"• SAc is created under Branch C;	 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. 			
	andwith an iCMS optional Roleadded	Points to Note SAc will be able to assign cases to all OUs like a PA			
	Additional Information Example (3) SAc may choose to assign cases either by Profile or by Case No. to OUA1 and OUB1 if so requires.				

Summary of iCMS Roles for an SA Account holder and related rights to assign court cases to the OUs⁷

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	Scenarios Administrative rights granted by PA to SA -				
			to assign cas by Profile (i.e. ca	e(s) ase types)	to assign case(s) by Case No.	
3.	 <u>SA with optional Role</u> <u>"to link-up case to OU Ac</u> <u>(same branch)"</u> <u>SA_D is created under H</u> and with an iCMS optiona added 	A with optional Role o link-up case to OU Accounts ame 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. <u>SA with optional Role</u> <u>"to create SA Account"</u> • <u>SA_E</u> is created under Branch E; and • with an iCMS optional Role is added <u>Additional Menu Items available fe</u> • Create SA Account • Maintain SA Account Profile Any SA(s) created by <u>SA_E</u> will inher <u>Additional Information</u> Difference between an SA Account option 		Same arrangement as per scenario 1 for SA_E writ the same branch code from SA_E opened by a PA and by an SA assigned with the Role to create SA				
		- I				
			SA Account opened			
			By a PA	By with the re	y an SA ·lated iCMS Role	
	Branch Code	Can be branch	assigned with any code	Will inherit the from the creati	same branch code ng SA	
	Availability of iCMS optional Roles	4 optio • To lir Acco • To lir Acco • To cr • To m Acco	nal Roles to choose: nk-up case to OU unts (all branches) nk-up case to OU unts (same branch) reate SA Account aintain default OU unt	 3 optional Role To link-up co (all branches To link-up ca (same branct) To maintain 	es to choose: ase to OU Accounts) se to OU Accounts h) default OU Account	

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