# Add, modify and block user

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|  | **Prerequisites:**To complete this User Guide, you need organisational administration profile access in the **CMS Portal.** |

This User Guide outlines the processes required to add, modify or block users in the **CMS Portal**, and is divided into two parts:

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## Part 1: Add user

| Step | Action | Result |
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|  | Log in to the **CMS Portal** | The **CMS Portal** home screen displays:The Home screen displaying available jurisdiction: Magistrates Court of Victoria and available options: File on One of My Cases, My Account and Organisation Administration. |
|  | Click: **Organisation Administration**Organisation Administration button | The **Organisation Administration** screen displays:The Organisation Administration screen displaying available options: Manage Users, Resend Account Invitation Email and Filings Report.  |
|  | Click: **Manage Users**Manage Users link | The **People** screen displays:The People screen displaying the List tab with Add user button and Update options. |
|  | Click: **Add User****Add User button** | The **People** screen displays user information fieldsA screenshot showing some of the Add user fields. |
|  | Complete the required panels and fields: Fields marked with a red asterisk \* are mandatory.

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| USER PANELS |
| In this field … | Provide this information … |
| E-mail | Type e-mail for relevant user. |
|  | **Note**:The e-mail address entered is used in the **CMS Portal** to:* Log in, and
* Receive automated notifications
 |
| Confirm e-mail address | Type e-mail address again. |
| Status | Select: **Blocked****Radio buttons for status of accounts - blocked and active** |
|  | **Important**:The account **must** be changed to **Blocked** as this prompts the user to acknowledge the **CMS Portal** terms and conditions upon account activation. |

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| 5 | *Continued …*

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| USER PANELS |
| In this field … | Provide this information … |
| Type of User | Select the relevant option:* **LLFAdmin:** Organisational Administrator account
* **LLFUser:** User account
 |
| Organisation | Displays the name of your **Organisation** |
| PANEL: Personal Information |
| First Name | Type the **First Name** of the user. |
| Surname | Type the **Surname** of the user. |
| Unique ID Number | Type a value as a unique identifier for the user. |
|  | **Note**:This number must be provided to the user to enter on account activation. |
| Secondary Email Address for All Notifications | Type an email address in addition to the user’s primary e-mail to receive copies of notifications. |
| Secondary Email Address for Rejections | Type an email address in addition to the user’s primary e-mail to receive copies of rejections, in addition to the user’s e-mail address. |
| Mobile Number for SMS Notifications | Type a mobile number to receive SMS notifications. |
| Phone Number | Type the user’s preferred contact number. |
| Fax | Type the user’s fax number. |
| Division | Type the user’s division within your organisation, if applicable. |
| Employee Identifier | Type the **Employee Identifier** used internally by your organisation, if applicable. |

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|  | Click the box in the **Captcha**Captcha image - I'm not a robot unticked  | A confirmation alert displays:Captcha image - I'm a robot ticked |
|  | Click: **Create new account**Create new account button | A confirmation message displays:Confirmation message showing that account has been created. |
|  | **Note**:The user is sent an email notifying them of the account creation, which contains a link the user needs to click to activate their account:Screenshot of account creation confirmation email. |
|  | **Important**:Provide the user with the **Unique ID Number** for their account. This must be entered by the user as part of the account activation process. |

## Part 2: Modify or block user

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|  | **Note**:* The steps in this section of the User Guide outline the process for **CMS Portal** administrators to modify user accounts.
* **CMS Portal** users with a defined **LLFUser** role can modify the following fields of their own accounts:

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| Field |
| First name |
| Surname |
| Secondary Email Address for All Notifications |
| Secondary Email Address for Rejections |
| Mobile Number for SMS Notifications |
| Phone Number |
| Fax |

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|  | **Important**:To block user accounts from accessing the **CMS Portal** with your organisation, follow the steps in this section of the User Guide to change the user’s **Status** to **Blocked** The user is sent a notification email when their account is blocked:Screenshot of account blocked notification email. |

| Step | Action | Result |
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|  | Log in to the **CMS Portal** | The **CMS Portal** home screen displays:The Home screen displaying available jurisdiction: Magistrates Court of Victoria and available options: File on One of My Cases, My Account and Organisation Administration. |
|  | Click: **Organisation Administration**Organisation Administration button | The **Organisation Administration** screen displays:The Organisation Administration screen displaying available options: Manage Users, Resend Account Invitation Email and Filings Report.  |
|  | Click: **Manage Users****Manage Users link** | The **People** screen with a list of users in your organisation displays:The People screen displaying the User Search by Profile tab with Profile Field and Profile Value search options, and Search and Clear buttons. |
|  | OPTIONAL:To search for a specific user, click: **User Search by Profile****User Search by Profile button** | The **People** screen, open to the **User Search By Profile** tab, displays:The People screen displaying the User Search by Profile tab with Profile Field and Profile Value search options, and Search and Clear buttons.Select the relevant **Profile Field** from the drop-down box and input a **Profile Value** (e.g. a specific surname), then click: **Search**.The 14 options for the Profile Field drop down box display including First Name, Unique ID Number and Business Name.  |
|  | OPTIONAL:To filter users by a specific field, click: **Advanced**Advanced button | The **People** screen, open to the **Advanced** tab, displays:The People screen displaying the Advanced tab with Field filter options and Continue button.Select the relevant **Field** from the drop-down box, then click: **Continue**.The 8 options for the Field drop down box display including Permission, Status and Role. Select the relevant **Operator** from the drop-down box(these will differ based on the field you selected). Complete the **Data** field – depending on the option you selected you will either input the relevant information into a text field or select an option from a drop-down box. Click: **Filter**. Graphical user interface, text, application, chat or text message  Description automatically generated |
|  | In the **Operations** column for the relevant account, click: **edit****Operations column with edit link** | The **My Account** screen, open to the relevant user’s account, displays:The My Account screen displaying the Profile tab showing some of the user's profile fields. |
|  | OPTIONAL:To modify additional user fields, click: **Personal Information**Personal information button | The **My Account** screen displays additional fields:The My Account screen displaying the Profile tab showing some of the user's personal information fields. |
|  | Modify the relevant user fields, then click: **Save****Save button** | A confirmation message displays:Confirmation message which reads: The changes have been saved. |
|  | **Hint**:To block a **CMS Portal** account, on the **Profile** page, change **Status** from **Active** to **Blocked**, then click: **Save****The My Account screen displaying the Profile tab. Status section highlighted with Blocked and Active options.** |
|  | **Hint**: Some changes to user accounts can be done in bulk, including:* Changes to users blocked/unblocked status, and
* Adding or removing of roles.

To make bulk changes, from the list of users on the **People** screen, select the relevant users and use the menu in the **Update Options** panel to make the desired change:Update options menu, with options to unblock users, block users, and add or remove admin or user roles.  |