# 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 fields  A screenshot showing some of the Add user fields. |
|  | Complete the required panels and fields:  Fields marked with a red asterisk \* are mandatory.   |  |  |  |  | | --- | --- | --- | --- | | 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. | |   *Continued …* | | |
| 5 | *Continued …*   |  |  |  | | --- | --- | --- | | 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. | | | | |
|  | 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:  |  | | --- | | 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 |
| --- | --- | --- | --- |
|  | 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. | |