

CASE ACCESS

There are three methods for granting users access to a case:

- An individual user can be invited to a case
- A group of users can be granted access to a case
- *A group of users with the same CJSM email address can be granted access to a case*

INVITE INDIVIDUAL USERS TO A CASE

To invite a user into a case, first go into the case, then click on the **People** button and click **Invite New Participant**.

Then enter the person's email address or role type in the email field to bring up a list of users.

Select the user that needs to be invited from that list.

A list of available roles for that user will appear as radio buttons. Please choose the appropriate role. For example, if the invitee is usually part of the defence community then the choices will be defence advocate, fee paid judge, or outside prosecuting advocate.

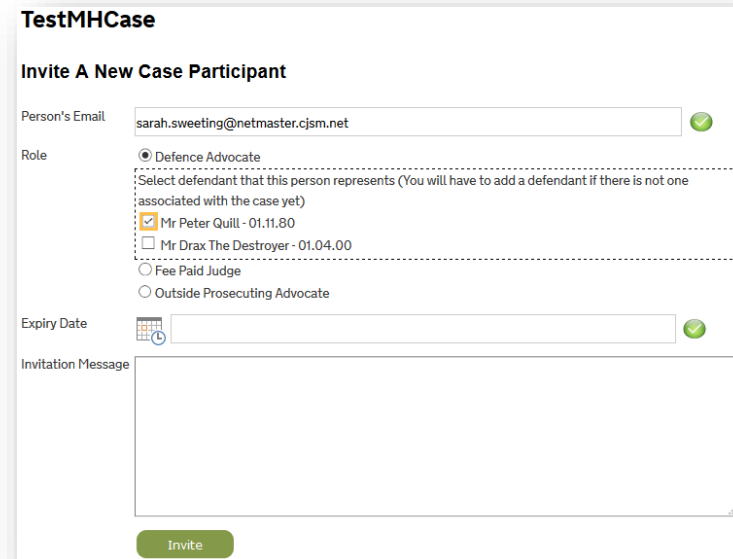
If the user is invited as a defence advocate, you will be able to specify which Defendants they are representing. This will then impact on what documents might be available to them.

You can optionally enter in an expiry date, where the invitee's access will be automatically removed from the case. This field is optional and can be left blank.

Add a message if required and then click **Invite**.

An email will then be sent to the user and will contain a link to the case. The case will now be both visible and accessible from their Case List.

When you invite a user, you will also be sent an email confirming that you made this action.



TestMHCCase

Invite A New Case Participant

Person's Email: ✓

Role: Defence Advocate

Select defendant that this person represents (You will have to add a defendant if there is not one associated with the case yet)

Mr Peter Quill - 01.11.80

Mr Drax The Destroyer - 01.04.00

Fee Paid Judge

Outside Prosecuting Advocate

Expiry Date: ✓

Invitation Message:

Invite

GIVE GROUPS OF USERS ACCESS TO A CASE

A group of users, defined by their 'Usual Role' and 'Location', can be granted access to a case. For example, you could add just NOMS based in Southwark, but not Prosecution, for instance.

To change a group's access to a case, click on the green **Access** button.

You can then see a list of all the groups who have access to the case and whether the groups are restricted by a location.

To add a group of users to the case click the **Add Role** button.

Then select a group from the **Role Name** drop-down and specify if you wish to restrict the group of users by their **Location**.

That group will then be added to the list and all the applicable users will be able to access the case.

To remove a groups access to a case, click the appropriate **Remove** button.



Please note that if access permission for a role type is removed (eg CPS remove access permission for HMCTS admin) the users that have not already accessed the case will no longer be able to do so. However, any users that had already accessed the case prior to the change of permissions will still have access to the case.

Roles

Add Role

	Name	Location
Remove	CPS Admin	Southwark
Remove	NOMS	Southwark
Remove	Judge	--
Remove	Prosecution	Southwark
Remove	HMCTS Admin	--

GRANT ACCESS TO A GROUP OF DEFENCE USERS WITH THE SAME CJSM EMAIL ADDRESS DOMAIN

It is also possible to grant access to a CJSM domain, such as swatham.cjsm.net, so that everyone in a defence solicitors firm can be granted access.

i *Only solicitor firms should be added by domain – never barristers' chambers, as instructed prosecuting counsel, or counsel for a co-defendant, may be from the same chambers.*

If you add an email domain, all registered users from that domain will be able to access the case, associated with the selected defendant(s).

To grant access to users with the same CJSM domain click **Add a Defence Email Domain**.

- Type the last part of the email address (following the @) for the organisation you would like to add to this case. For example: johnson.co.uk.cjsm.net
- Choose which **Defendant(s)** this domain should be associated with.
- Leave **Location** set as **All** unless requested otherwise. Setting this to a specific location will restrict access to users based at that location, but by doing so will also restrict cross office working.

Then click **Add Defence Email Domain**.

Defence Email Domains

Add a Defence Email Domain

Add a Defence Email Domain

Defence Email Domain	<input type="text"/>
Associated Defendants	<input type="checkbox"/> James Smith - 12.02.70
Location	All <input type="text"/>
<input type="button" value="Add Defence Email Domain"/>	

REQUESTING ACCESS TO A CASE

If a user attempts to access a case which he/she is not authorised to access they will be presented with a warning screen that gives a list of people who are able to grant access.

They can then contact one of the users on the list and ask them to invite them into the case.

How to do this is covered earlier in this Quick Reference Guide under 'Invite Individual Users to a Case'.

The user is also able to see a list of roles that have access to the case to help them contact a user who can grant access.

R V BALL

You are not authorised to view this case. The following people are able to invite you to this case:

Name	Role	Email Address
Mr Andrew Bidder	HMCTS Admin	andrew.bidder@caselines.co.uk
mr Jamie Foote	Judge	jamiefoote@caselines.co.uk

The following roles and locations are able to access this case:

Role	Location
CPS Administrator	Southwark
Offender Management Services	Southwark
Probation Staff	Southwark
CPS Prosecutor	Southwark
Associate Prosecutor	Southwark
Fee Paid Judge	All
Full Time Judge	All
Outside Prosecuting Advocate	Southwark