

Case Management System How to create your CMS account using SA and Activate it?

10 February 2023

In order to access the Case Management System (CMS) and to sign documents, users need to equip themselves with both a client authentication certificate (stored on a physical device: smart card or USB stick) and a qualified electronic signature certificate (stored on physical device or software).



To be able to create your account, you must already have in your possession your Smart Card or USB stick containing your authentication certificate

1. Create a new account

a) Insert your smart card or USB stick containing your authentication certificate b) Access the CMS login page

- For Pre-Production: <u>https://cerus.unified-patent-court.org/login</u> (2nd CMS practice purpose)
- For Production: <u>https://cms.unified-patent-court.org/login</u>

c) On this login page, select the action "Create user"

- d) Select your authentication certificate
- e) Enter your PIN code

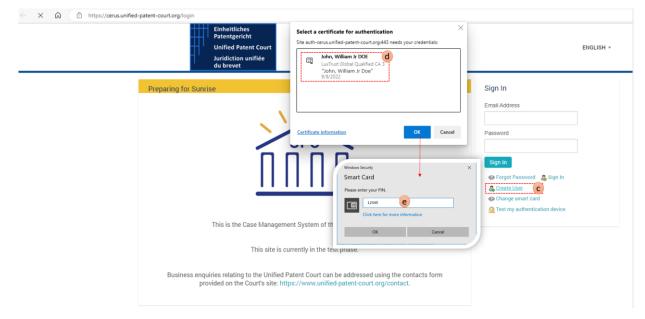


Figure 1- CMS's login page



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Once the PIN is entered you will be redirected to the Sign Up page.

- a) On this Sign Up you need to enter your details:
 - First Name
 - Last Name
 - An email for CMS account



Please note that the entered email will be used as an ID in the system (you cannot use an email already associated to a user in the CMS).

- b) Check the box "I have read the Site Policy"
- c) Click on "sign up" Button

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REGISTER and Search Support center	Velcome	
Sign Up		
* indicates required data		
First Name *	ndoL	
Last Name *	DOE	
Email for CMS account *	John.doe@myemail.com	
Site Policy		
Please read the Site Policies		
You must click on the checkbox to confirm that Policy. X	you have read the Site I have read the Site Policy	C SIGN UP

Figure 2 - Insert your details in the Sign-Up page



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Once these details have been "completed", you will be redirected to the "Sign up Case Personal details" page, where you will have to enter some additional details

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Figure 3 - Confirm your data

- a) Click on "To do"
- b) Please enter:
 - First Name •
 - Last Name •
 - And a recovery code •



Please record and store this recovery code. This one will be asked in case you need to change / replace your smart card / USB stick containing your authentication certificate.



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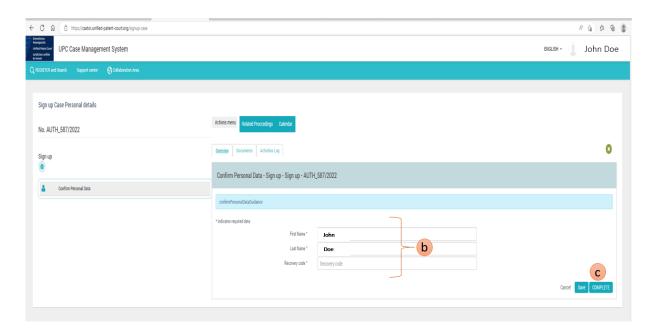


Figure 4- CMS's User Account creation - Enter user details

 The system generates and sends an email containing a Secret Code. You will receive an email containing a Secret Code. This code will be used in the next activation step



Figure 5 - Sample of email containing the Secret Code



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- 3. The user enters the received Secret Code
 - a) Enter your **SECRET** Code (*received by email*) or ask for a new secret code b)Click on button "COMPLETE"

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Linter Secret Code	"indicates required data					
	You will receive an email at your CNIS email account giving you a secret access code. You must enter this code and press "Complete". If you request a new code select "Request a new secret code" and press "Complete". Enter the new code as above.					
	The required secret code was sent to your CNIS account email address					
	Repett a new second code					
	Secret Code " 1168956ab6/274-40e0-930a4.790hf221105cc]					
	Cancel	Save COMPLETE				

Figure 6 - Entering your Secret Code



If for any reason you did not get the email containing your secret code, you can ask for a new one by clicking on the "Request a new secret code" and set the value to "Yes".

- 4. The system generates an acknowledgement document that the user needs to sign. This "Acceptance Document" must be downloaded, signed by you and uploaded to the system to complete the activation procedure.
 - 4.1 The "Acceptance Document" must be downloaded
 - a. Click on the document within the "Documents" tab folder
 - b. From the document details panel, click on the document name
 - c. The document is displayed within the CMS's built-in PDF viewer



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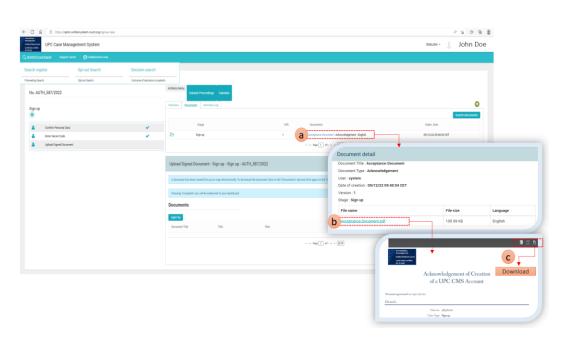


Figure 7 - Download the Acceptance Document



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4.2 Sign this downloaded document

Once the file has been downloaded, open it with a PDF Viewer (allowing to add a signature to the PDF). We show, here after as example, the usage with Adobe Acrobat Reader.

Within Acrobat,

- a) Select the additional tool bar (with actions).
- b) Select the "Certificates" icon

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Details						
	Case no. 587/2022					
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Figure 8 - Open the document with Adobe Acrobat for signature



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Acrobat Reader displays additional "options".

- a) Select the option "Digitally Sign"
- b) Select the authentication certificate. This certificate has as "intended usage" : Non-Repudiation

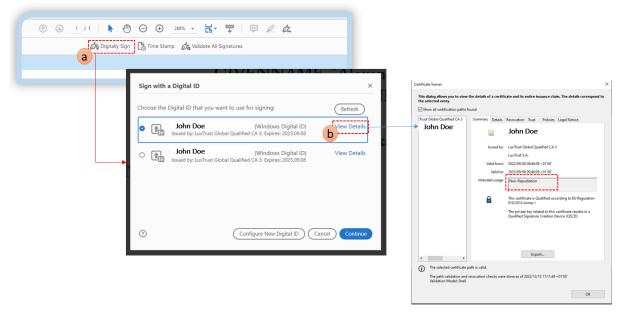


Figure 9- Certificate Selection for signature

- c) Select the area and appearance of your signature in the document.
- d) Enter your PIN Code when the system prompt such dialog box

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	Document generated on 09/12/2023 Details Case no. 5%7/2022 Case Type Sign up Case Type Sign up

Figure 10 - Signature of the document



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4.3 Upload this signed document

Once the document has been signed, you need to upload this document to the CMS in order to complete the activation of your account.

- a) Click on "Add file" within the Documents tab folder
- b) Select the file (signed Acceptance Document)
- c) Click on "Complete" button

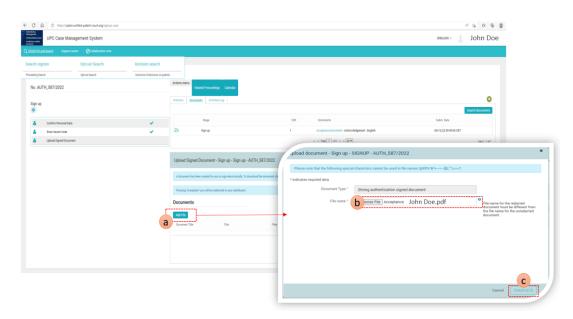


Figure 11 - Upload the Sign Document to the CMS

The system checks this submitted signed document. If everything is fine, you will be prompted with a message, displayed in green, saying that the activation of your account is validated and you will be redirected to the dashboard page. In case of problem(s), the system will prompt you with an error message (displayed in red).

If you manage to reach this point, your account is now validated and you can start to work with the CMS.

In case of issue, please check our corporate website in the FAQ section or contact our support team via this <u>contact form</u>.