

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

- c) On this login page, select the action “Create user”
- d) Select your authentication certificate
- e) Enter your PIN code

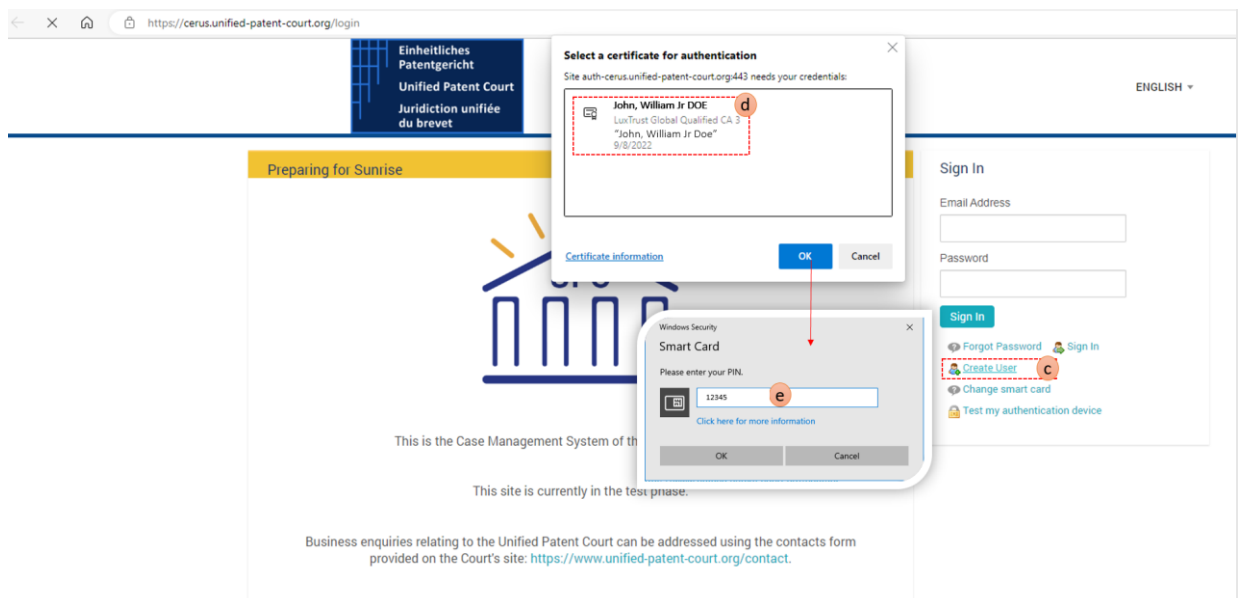


Figure 1- CMS's login page

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



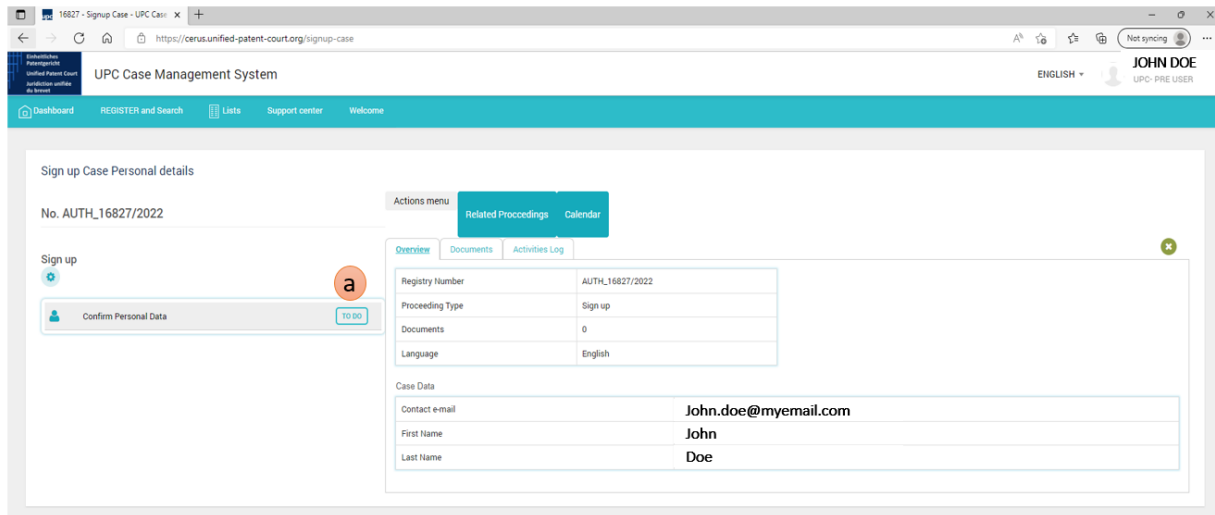
Please note that the entered email will be used as an ID in the system (*you cannot use an email already associated to a user in the CMS*).

b) Check the box “I have read the Site Policy”

c) Click on “sign up” Button

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

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



UPC Case Management System

Sign up Case Personal details

No. AUTH_16827/2022

Sign up

Confirm Personal Data **To do**

Registry Number: AUTH_16827/2022

Proceeding Type: Sign up

Documents: 0

Language: English

Case Data

Contact e-mail: John.doe@myemail.com

First Name: John

Last Name: Doe

Figure 3 - Confirm your data

- Click on “To do”
- 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.

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

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”

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

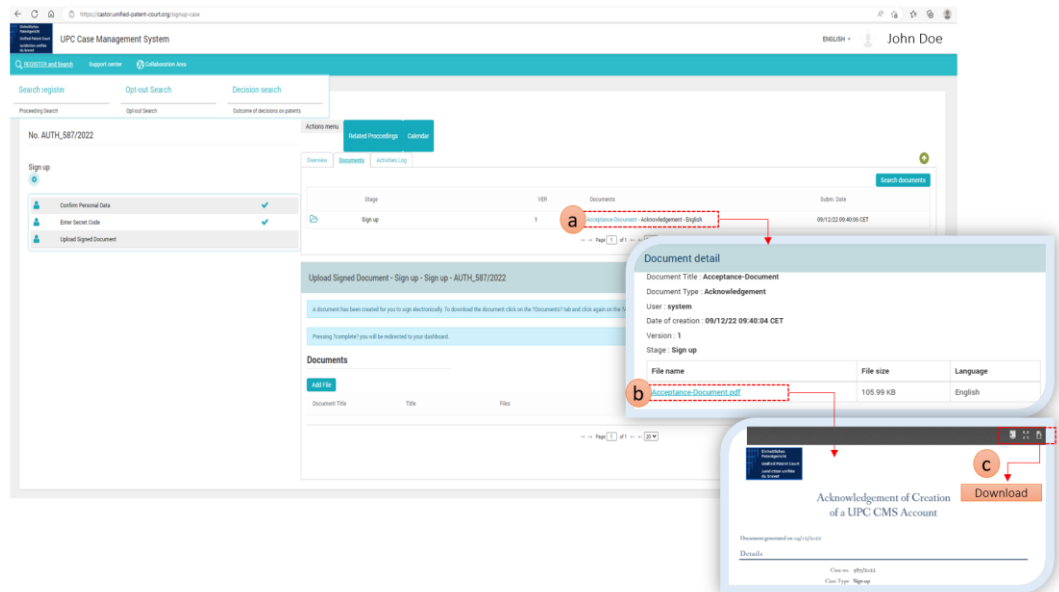


Figure 7 - Download the Acceptance Document

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,

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

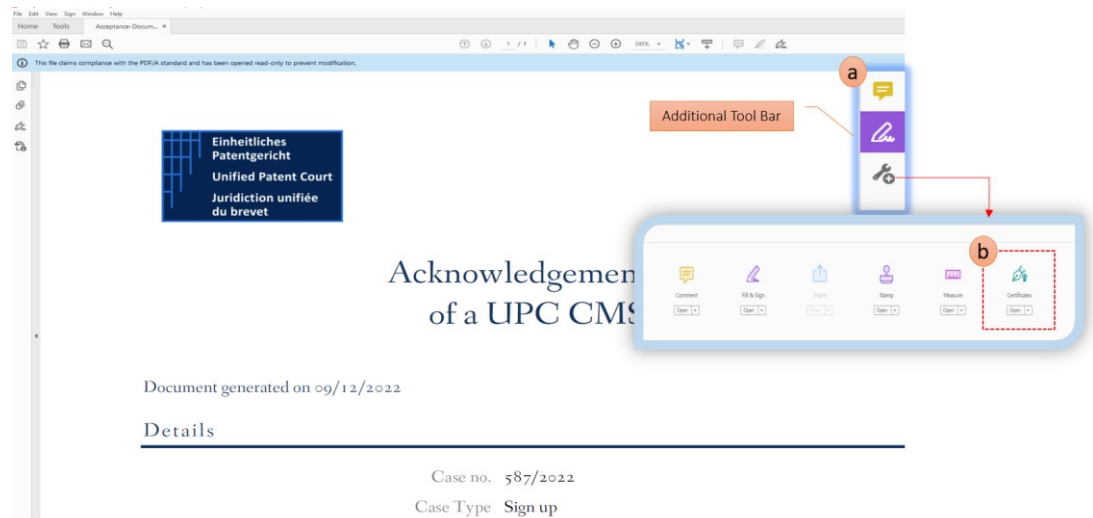


Figure 8 - Open the document with Adobe Acrobat for signature

Acrobat Reader displays additional “options”.

- Select the option “Digitally Sign”
- Select the authentication certificate. This certificate has as “intended usage” :
Non-Repudiation

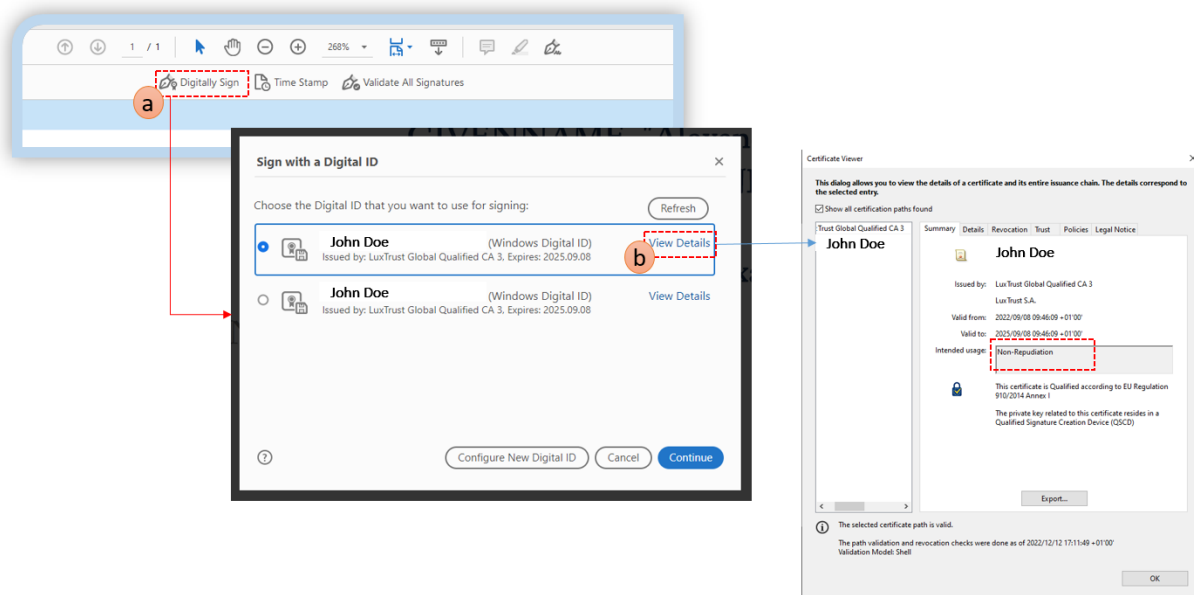


Figure 9- Certificate Selection for signature

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

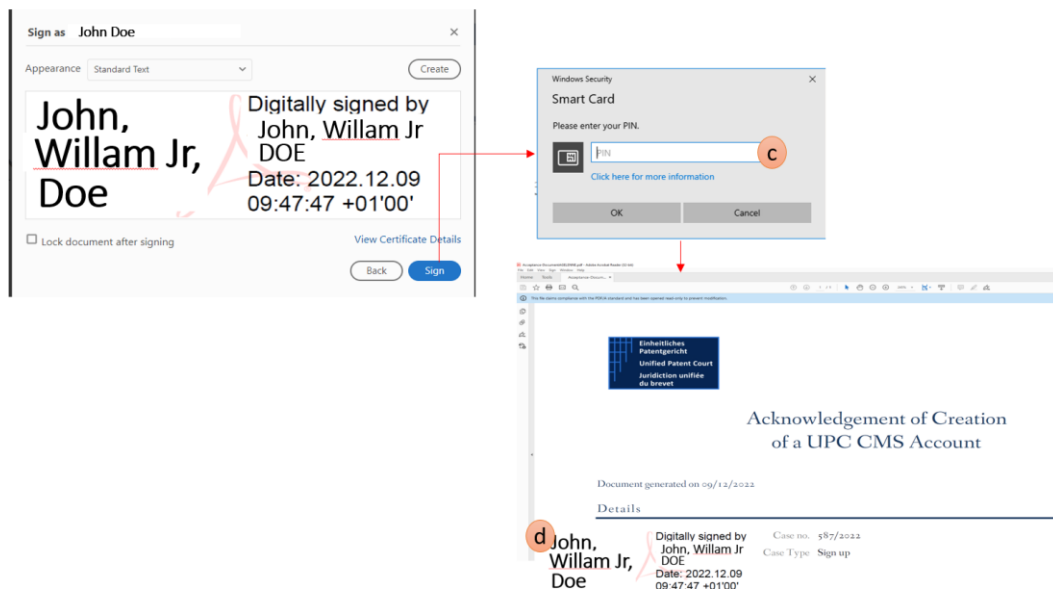


Figure 10 - Signature of the document

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.

- Click on “Add file” within the Documents tab folder
- Select the file (signed Acceptance Document)
- Click on “Complete” button

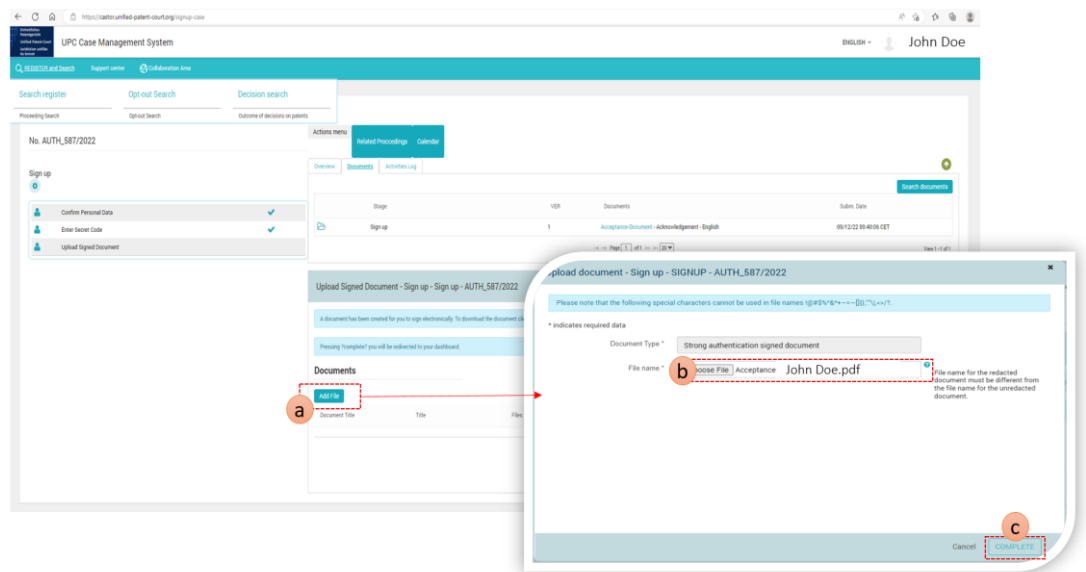


Figure 11 - Upload the Sign Document to the CMS

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 [contact form](https://www.unified-patent-court.org/contact).