4.2 Participantship Management

DA 3 CCASS/ CCMS DELEGATED ADMINISTRATOR APPLICATION/ MAINTENANCE FORM

WHEN TO USE:

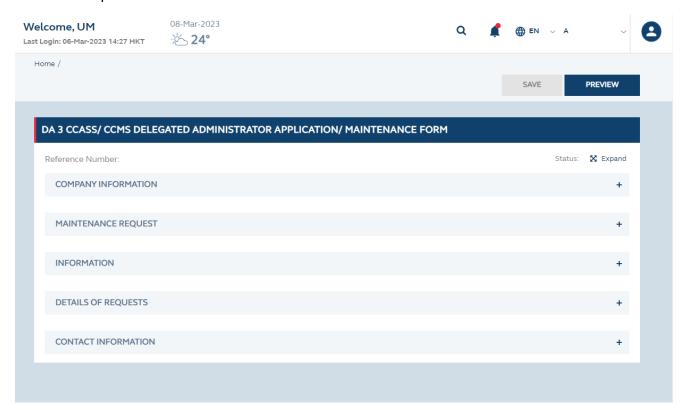
- ➤ When a HKSCC/HKCC/SEOCH Participant or HKSCC Designated Bank wishes to apply or maintain their CCASS / CCMS Delegated Administrator (DA) through Client Connect.
- > This eService is available 24 hours a day; except during regular system maintenance.

ABOUT THIS eSERVICE:

- ➤ This eService is available to Client Connect Delegated Administrators (CCDAs) or Business users with the access right EU_UserMaintenance.
- ➤ The eService is responsive to options selected by Participants such that different fields will appear when maker selects different maintenance request. The request for adding admin role to existing user will be accepted starting from 4 September 2023 (Monday) tentatively, any eService submitted with such request before the mentioned date will be rejected.
- Multiple maintenance requests (if applicable) can be submitted within 1 eService but only for 1 Participantship.
- ➤ Email and Dashboard notifications will be sent to both maker and checker when there is change related to eService status.
- > After the end of workflow, participants can download the form in PDF format for reference.

SAMPLE UX:

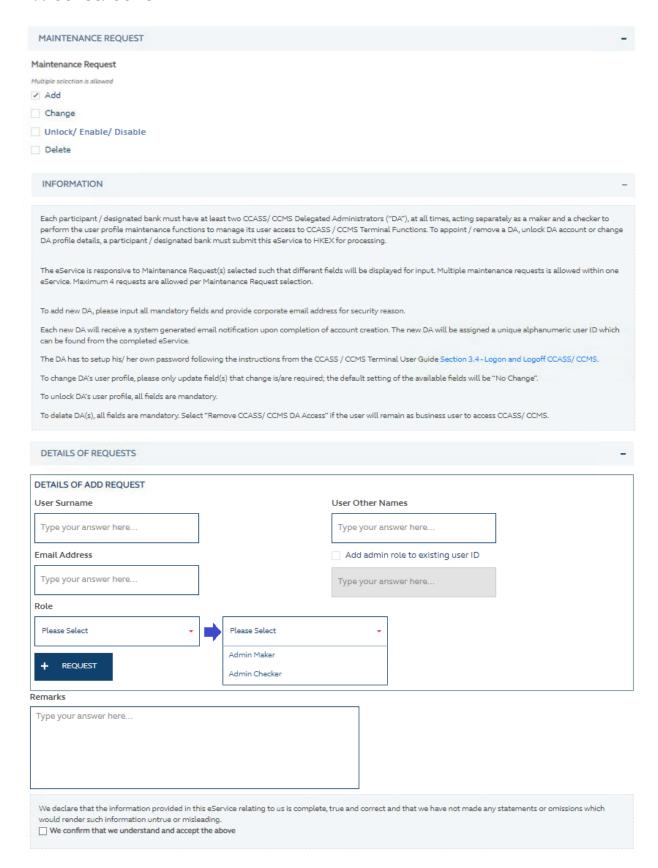
Users can expand all sections to view all the fields.



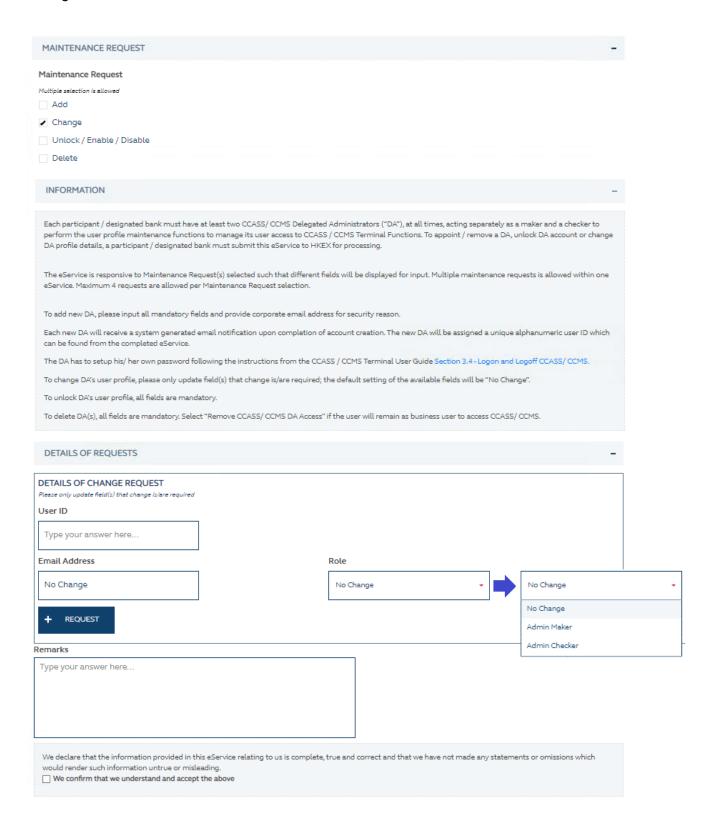
There is built-in validation on company information and the data input.



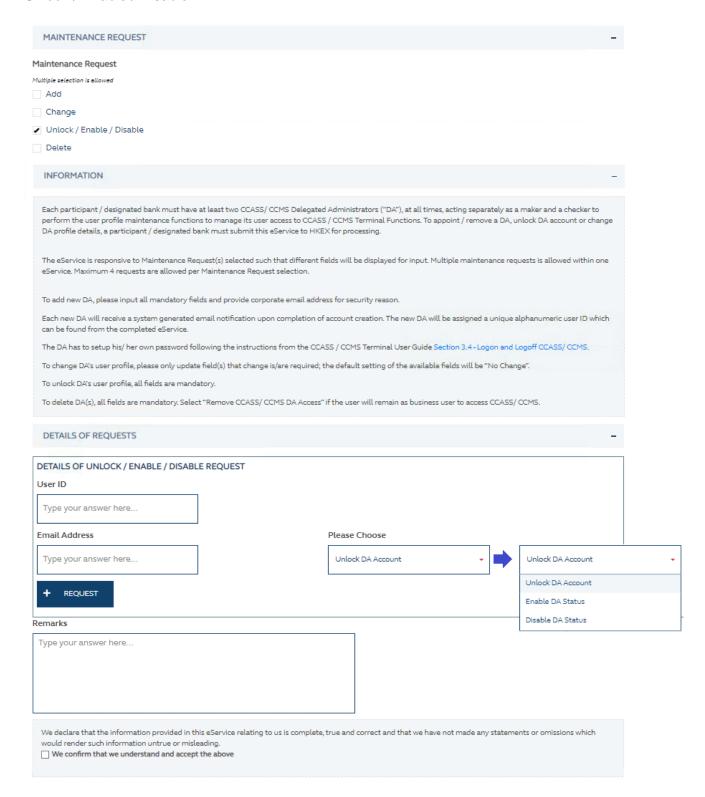
Add CCASS/ CCMS DA



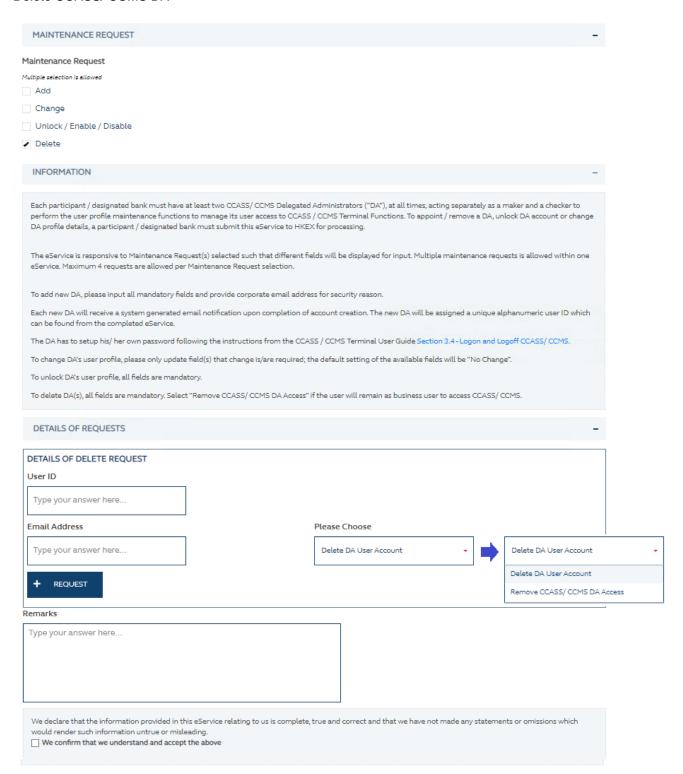
Change CCASS/ CCMS DA



Unlock / Enable / Disable DA



Delete CCASS/ CCMS DA



FIELDS HIGHLIGHTS

#	Field Name	Highlights	
COMPANY INFORMATION			
1	From	- Display the company name on behalf of which the maker is	
2	As	acting - Applicable to HKSCC/ HKCC/ SEOCH Participant and HKSCC Designated Bank	
MAINTENANCE REQUEST			
	Maintenance Request		
3	AddChangeUnlock / Enable / DisableDelete	 Maker can tick Add (option 1), Change (option 2), Unlock / Enable / Disable (option 3), and/or Delete (option 4) requests 	
DETA	ILS OF INFORMATION		
Maintenance Request: Add			
 All fields are mandatory unless specified Maker can submit more than 1 request (max 4 requests) 			
DETA	ILS OF ADD REQUEST		
4	User Surname	- Field format: Alphabatic	
5	User Other Names	- Field format: Alphabatic	
6	Email Address	- Field format: Alphanumeric	
7	Add admin role to existing user ID (function available starting from 4 September 2023 tentatively)	 Field format: Checkbox Applicable to existing user only Fill in User ID in the box available if "Add admin role to existing user ID" is checked 	
8	Role	- Dropdown menu	
9	+ REQUEST	Click to add another requestField 4 to 8 will be populated for input	
Maintenance Request: Change			
- All fields are mandatory unless specified - Maker can submit more than 1 request (max 4 requests) DETAILS OF CHANGE REQUEST Please only update field(s) that is/are required.			
10	User ID	- Field format: Alphanumeric, no special character is allowed	
11	Email Address	- Field format: Alphanumeric	
		- Default Email Address: No Change	
12	Role No Change Admin Maker Admin Checker	- Dropdown Menu - Default Role: No Change	
13	+ REQUEST	- Click to add another request	
	enance Request: Unlock / Enable /	- Field 10 to 12 will be populated for input	
	All fields are mandatory	DISUNIC	
- Maker can submit more than 1 request (max 4 requests)			
DETAILS OF UNLOCK / ENABLE / DISABLE REQUEST			
14	User ID	- Field format: Alphanumeric, no special character is allowed	
15	Email Address	- Field format: Alphanumeric	
16	 Please Choose Unlock DA Account Enable DA Status Disable DA Status 	- Dropdown Menu - Default Option: Unlock DA Account	
17	+ REQUEST	- Click to add another request	

#	Field Name	Highlights		
		- Field 14 to 16 will be populated for input		
Maintenance Request: Delete				
- All fields are mandatory - Maker can submit more than 1 request (max 4 requests) DETAILS OF DELETE REQUEST				
18	User ID	- Field format: Alphanumeric, no special character is allowed		
19	Email Address	- Field format: Alphanumeric		
20	Please Choose	 Dropdown Menu Default Option: Delete DA User Account "Delete DA User Account" is for CCASS/ CCMS DA who intends to remove both of its DA and business user role; "Remove CCASS/ CCMS DA Access" is for CCASS/ CCMS DA who intends to remove its DA role only and remain its business user role. 		
21	+ REQUEST	 Click to add another request Field 18 to 20 will be populated for input 		
Maintenance Request: Add, Change, Unlock / Enable / Disable and/or Delete:				
22	Remarks	- Field format: free text - Optional input		
23	Declaration Box	- Mandatory Checkbox		
CONTACT INFORMATION				
24	Name of Contact Person	- Auto-filled based on maker's profile and content is editable		
25	Email Address	- Maker can optionally provide up to 5 contact information		
26	Telephone Number	- If group email is defined, fill in group email instead of		
27	+ CONTACT PERSON	maker's email - Built-in validation: Only on the format of email address and telephone number but not on data correctness		