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- CSA Support Specialist
- I.T. Support Specialist



CSA: the Company Secretarial Software 公司秘書專業軟件

■ For an identification number as protected information, how to determine what to show (or what to hide)? 對於身分識別號碼作為受保護資料，如何確定顯示什麼 (或隱藏什麼)？

Within the context of “protected information”, an identification number can be a HKID Card No. or a Passport No. To determine what to show (or what to hide), simply cut the no. into two halves and show the first half. The showing part is called the “partial number”. For example, the partial number of HKID Card no. A123456(7) will be “A123”. What if the no. cannot be cut into two even halves as in XA123456(7)? The simple rule for these cases is that the first half must be one character more than the second half, therefore we will show “XA123”.

The same holds true for any passport no., no matter how many characters it may consist of. But it is important to note that on counting the length of the original no., all symbol characters like “(”, “)”, “-”, “#” etc. should be ignored.

For a HKID Card no., besides the above-mentioned method, you can also take all the prefixed letters (A-Z) plus the first 3 digits (0-9) to form the partial number.

就“受保護資料”的範圍，身分識別號碼可以是香港身份證號碼或護照號碼。要確定顯示什麼（或隱藏什麼），我們只需將號碼分成兩半並顯示上半部即可。被顯示的部分稱為“部分號碼”。例如，香港身份證號碼 A123456(7) 的部分號碼為 A123。如果像 XA123456(7) 那樣無法被平均分成兩半時該怎麼辦？處理這些情況的簡單規則是：前半部分必須比後半部分多一個字符，因此我們將顯示 XA123。

這方法同樣適用於任何護照號碼，無論它包含多少個字符。但緊記，在計算號碼原來的長度時，須忽略所有“(、)”、“-、”、“#”等符號。

對於香港身份證號碼，除了上述方法外，您還可以將所有前置的英文字母 (A-Z) 加上頭 3 位數字 (0-9) 來組成其部分號碼。

What CR would do to those “old forms” filed before 24 October 2022 which still contained protected information?

在 2022 年 10 月 24 日之前交付的“舊表格”還是看得到那些受保護資料的，CR 會怎樣處理？

According to CR’s notice, the scheduled implementation of Phase 3 of the New Inspection Regime is on 27 December 2023. From that date, data subjects (that are the directors themselves) could apply to CR to protect from public inspection of their Protected Information (usual residential address and full identification no.) contained in documents already registered, and replace such information with their correspondence addresses and partial identification nos.

根據 CR 公告，第三階段新查冊安排預定會在 2023 年 12 月 27 日實施，屆時資料當事人（即董事本人）可向 CR 申請將過往已登記文件所載的受保護資料（通常住址及完整身分識別號碼），以通訊地址及部分身分識別號碼取代，讓公眾查閱。



CPAnywhere: Professional Practice Management System 執業管理系統

What to do in the system when there is a change of supervisor 遇有主管變動時在系統裡應怎麼辦

Step (1) Deactivate the outgoing Supervisor
步驟一 將退任主管設定為“不活躍”

To prevent the outgoing supervisor to access the system, you can deactivate this employee.

為防止退任主管進入系統，您可以將該僱員設定為不活躍僱員。

- Go to { HR > Personnel File > Employee Record }
前往 { HR > Personnel File > Employee Record }

- Press the employee's [Edit] button and reply password
按下該僱員的 [Edit] 按鈕並輸入碼
- Set the employee to "Inactive" and "Resigned", then press the [Save] button when finished
將僱員設置為 Inactive 和 Resigned · 完成後按 [Save] 按鈕

Step (2) Update the security level of the new Supervisor
步驟二 更新新任主管的 security level

The security level is used to control the users' access range. Users are allowed to manage their subordinate's data.

- Go to { Maintenance > Security Control }
前往 { Maintenance > Security Control }
- Modify the new supervisor's security level
更改新任主管的 security level
- Press the [Submit] button when finished
完成後按 [Submit] 按鈕

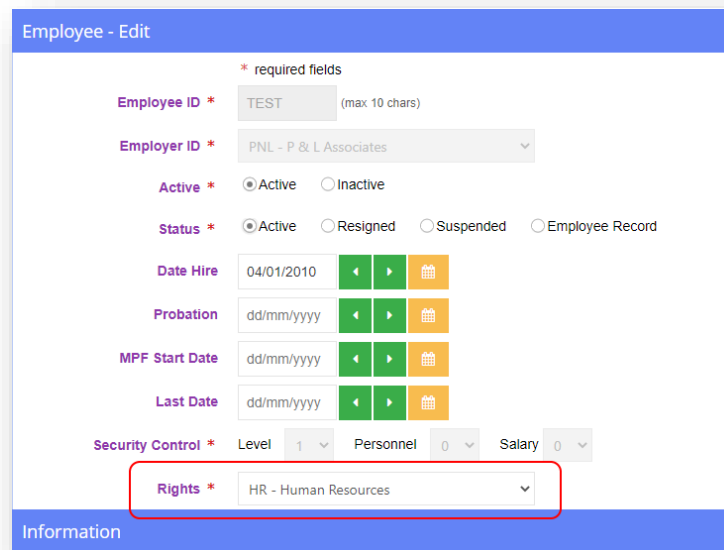
#	Employee ID	Department	Employee Name	Level	Personnel	Salary
1	001	ACCOUNT	Lawer	0	0	0
2	003	AUDIT	003	0	0	0
3	005	AUDIT	Demo	0	0	0
4	ADMIN	AUDIT	Office Administrator	9	9	9
5	BM	ACCOUNT	BM	0	0	0
6	BU	AUDIT	Business Unit Manager	0	0	0
7	MASTER	ACCOUNT	System Administrator	9	9	9

Step (3) Modify the access right of the new Supervisor
步驟三 更改新任主管的 access right

The “Access Right” is defined as a template to control whether these users can access what operations.

“存取權限”可定義為一個模板以管控某些用戶是否有權進行某些操作。

- Go to { HR > Personnel File > Employee Record }
前往 { HR > Personnel File > Employee Record }
- Press the employee’s [Edit] button and reply password
按下該僱員的 [Edit] 按鈕並輸入密碼
- Update the new supervisor’s “Rights”
更改新任主管的 Rights
- Press the [Save] button when finished
完成後按 [Save] 按鈕



The screenshot shows the 'Employee - Edit' form with the following fields:

- Employee ID * (required field): TEST (max 10 chars)
- Employer ID * (required field): PNL - P & L Associates
- Active * (required field): Active Inactive
- Status * (required field): Active Resigned Suspended Employee Record
- Date Hire: 04/01/2010
- Probation: dd/mm/yyyy
- MPF Start Date: dd/mm/yyyy
- Last Date: dd/mm/yyyy
- Security Control * (required field): Level 1, Personnel 0, Salary 0
- Rights * (required field): HR - Human Resources (highlighted with a red box)

Step (4) Modify the corresponding staff’s Supervisor and Leave Approver
步驟四 更改相應員工的主管及 Leave Approver (休假審批者)

To update the “leave approver” and “supervisor” of the outgoing supervisor’s subordinate. It is preferred to add a new record for each subordinate to keep the history of changes.

更新退任主管下屬的“休假審批者”和“主管”。最好為每名下屬添加一個新的記錄以保存變更的歷史。

- Go to { HR > Personnel File > Employee Record }
前往 { HR > Personnel File > Employee Record }
- Press the employee’s [Edit] button and reply password
按下該僱員的 [Edit] 按鈕並輸入密碼
- Select the “Supervisor” tab and press [Add Supervisor] to add a new record
選擇 Supervisor 分頁並按 [Add Supervisor] 以新增一個新記錄

Information

Detail Bank Account Comment Contact Education Emergency Job Title [1] Leave Policy

Language Roster Pattern [1] Skill Supervisor [1] Wage [1] Work Experience Working Visa

Add Supervisor

Effective Date 31/08/2015

Supervisor ADMIN - Office Administrator		
Alt-Supervisor		
Level 1 Leave Approver	1 ADMIN - Office Administrator	2 N/A
	3 N/A	4 N/A
Level 2 Leave Approver	1 N/A	2 N/A
	3 N/A	4 N/A
Level 3 Leave Approver	1 N/A	2 N/A
	3 N/A	4 N/A
Level 4 Leave Approver	1 N/A	2 N/A
	3 N/A	4 N/A
CC	1 N/A	2 N/A

Save Cancel

- Enter the effective date and other settings
輸入生效日期和其他設定

Supervisor

Effective Date * 31/10/2022 (dd/mm/yyyy)

Supervisor BU - Business Unit Manager

Alt-Supervisor ADMIN - Office Administrator

Level 1 Leave Approver

1	Office Administrator [A]	2	Business Unit Manager
3	*** Please Select ***	4	*** Please Select ***

Level 2 Leave Approver

1	Lawyer [001]	2	*** Please Select ***
3	*** Please Select ***	4	*** Please Select ***

Level 3 Leave Approver

1	*** Please Select ***	2	*** Please Select ***
3	*** Please Select ***	4	*** Please Select ***

Level 4 Leave Approver

1	*** Please Select ***	2	*** Please Select ***
3	*** Please Select ***	4	*** Please Select ***

CC

1	*** Please Select ***	2	*** Please Select ***
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OK Cancel

- Press the [OK] button when finished
完成後按 [OK] 按鈕

Samples of Custom Reports created by CPAnywhere users CPAnywhere 用戶創建的自定報表示例

Every firm operates differently from others. The standard reports offered in CPAnywhere are designed to suit most firms, but may not satisfy everyone's requirements in every detail. Therefore, we offer a user-friendly custom report writer function for users to build on. You may like to see how others are building their own templates. Let us share three custom report formats that are recently done by CPAnywhere users as examples:

每間公司的運作方式都與其他公司不同。CPAnywhere 提供的標準報表旨在適合大多數公司，但可能無法滿足所有人在每個細節上的要求。因此，我們提供了一個用戶友好的自定報表編寫功能供用戶使用。您可能也想參考其他人所何構建的範本。讓我們分享最近由幾位 CPAnywhere 用戶完成的三個自定報表格式作為示例：

Sample (1) Employee Detailed Job Charge Report
 示例一 員工詳細工作收費報告

Operating Employee ID	Operator Nick Name	Served Customer ID	Served Customer Name	Job Assignment ID	Operator job charge hour
003	Tommy	1200001	ABC Company Limited	1200001-AUD-SA-20121231	95.20
				1200001-AUD-SA-20221231	21.00
		1200002	Microsoft Hong Kong Limited	1200002-ACC-BKK-20120331	1.00

Sample (2) Time Sheet Register per Employee
 示例二 個別員工的工時表登記冊

Operating Employee ID	Working Date	Time Sheet Type	Job Assignment ID	Served Customer ID	Timesheet TimeCode	Timesheet Work Hour	Timesheet Charge Hour	Customer Company Defined Group ID	Timesheet Charged Amount
003	01/12/2022	Job	1200001-AUD-SA-20230331	1200001	AUD-SA-01	2.00	2.00	AUDTEAM	3,000.00
	02/12/2022	Job	1200001-AUD-SA-20230331	1200001	AUD-SA-01	8.00	8.00	AUDTEAM	12,000.00
	Total:					31.00	31.00		15,000.00
005	14/07/2022	Job	1200001-AUD-SA-20221231	1200001	AUD-SA-02	6.00	6.00	AUDTEAM	9,000.00
	28/07/2022	Job	1200001-AUD-SA-20221231	1200001	AUD-SA-00	4.00	4.00	AUDTEAM	6,000.00
	Total:					16.00	16.00		15,000.00

Sample (3) Listing of Access Rights per Position
 示例三 個別職位的存取權限列表

Report Header 報表欄目	Position ID	Template	Group	Right	View	New	Edit	Delete	Print	Execute	
Sample Data 示例資料	Accounting Manager	AM Access Rights	Finance	Account Analysis Code	✓	✓	✓	✓	✓	✓	
				Account Period	✓						
				Bank Account	✓	✓	✓	✓	✓	✓	
				Billing	✓	✓	✓	✓	✓	✓	
				Chart of Accounts	✓		✓		✓	✓	
				General Ledger	✓	✓	✓	✓	✓	✓	
				Disbursement	✓	✓	✓	✓	✓	✓	
			Settlement	✓	✓	✓	✓	✓	✓		
										
			HR	Allowance Scheme	✓						
				Attendance Confirm.	✓						
				Calculate Leave Bal.	✓						
				Employee File							
				Payroll							
				Leave Approval	✓		✓				✓
										
			Office	Billing Code	✓	✓	✓	✓	✓	✓	✓
				Job Code	✓	✓	✓	✓	✓	✓	✓
				Work Procedure	✓	✓	✓	✓	✓	✓	✓
				Job Assignment	✓	✓	✓	✓	✓	✓	✓
.....											



AML system for CSA

(為遵從打擊洗錢及恐怖分子資金籌集的規定)

Updated Version 1.2.1

更新版 1.2.1

For existing users, please download and update your AML system for CSA to version 1.2.1 through our Download Center. The major changes on this version include the following:

對於現有用戶，請通過我們的下載中心下載 AML system for CSA 的最新版本 1.2.1。此版本的主要更改包括以下內容：

Updated Item
更新項目 (1)

After expanding the scope of searching, the present Sanction and Fugitive lists are greatly enhanced as follows:

擴大搜索範圍後，目前的制裁和被通緝清單大大增強如下：

Sanction Programs 制裁項目

- Hong Kong SAR required checks, mainly the UN sanction list
香港特別行政區要求的查核，主要是聯合國制裁清單。
- Australia sanction list
澳洲制裁清單
- Canada sanction list
加拿大制裁清單
- China sanction list
中國制裁清單
- European Union sanction list
歐盟制裁清單。
- United Kingdom Treasury sanction list
英國財政部制裁名單
- United Kingdom Office of Financial Sanction Implementation list
英國金融制裁執行署名單
- United States Bureau of Industry and Security sanction list
美國工業和安全局制裁名單
- United States State Department sanction list
美國國務院制裁名單
- United States Treasury sanction list
美國財政部制裁清單。
- World Bank sanction list
世界銀行制裁清單

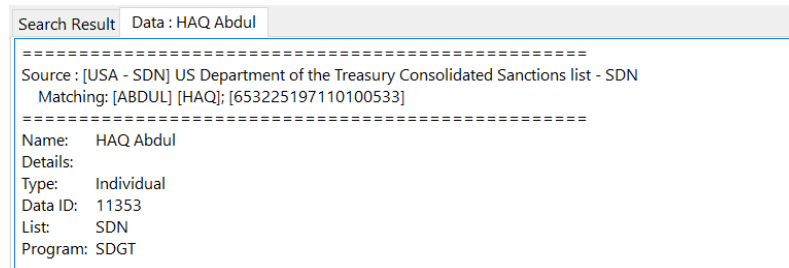
Fugitive List 被通緝名單

- Hong Kong Police Force
香港警務處
- Hong Kong ICAC
香港廉政公署
- Europol: European Union Agency for Law Enforcement Cooperation
歐洲刑警組織：歐盟刑事司法合作
- FBI: United States Federal Bureau of Investigation
美國聯邦調查局

- Interpol: International Criminal Police Organization
國際刑警組織

Updated Item 更新項目 (2) In the previous version, it doesn't show the matching words in the Sanction information. You need to examine all the findings in order to locate the right one that exactly matches your entity information. The updated version is enhanced. After the system finished searching, it will show the matching keywords found.

之前的版本未有顯示制裁信息中的匹配詞。您需要檢查所有調查結果，以便找到與您的實體信息完全匹配的正確調查結果。更新版本在這方面增強了。系統搜索完成後，會顯示找到的匹配關鍵詞。



Updated Item 更新項目 (3) To further integrate with your CSA data, the updated version of AML system for CSA will also include the Company Officers, Shareholders, and Beneficial Owners' information together with other information on the Client Confirmation document.

為了進一步與您的 CSA 數據整合，AML system for CSA 的更新版本會與其他信息一起，將公司管理層人員、股東和受益人的信息包含在客戶確認文件中。

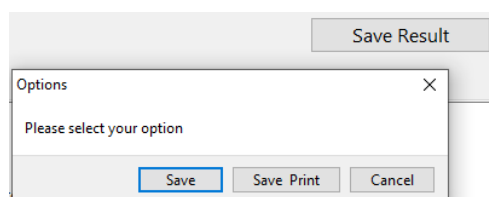
Company Officer Information 公司/機構管理層人員信息			
Identification no. 身份證明文件號碼	Name of Officer 管理層人員姓名	Position 職位	Becoming Date 委任日期
X018203(4)	CHAN Kwok King	Director	01 Mar 2021
369985221444523	SULTAN SALEH	Director	01 Mar 2021

Shareholder Information 股東信息			
Identification no. 身份證明文件號碼	Name of Shareholder 股東全名	% share Ownership 股份所有權(%)	Becoming Date 成為股東日期
A123456(7)	Apple Au 歐蘋果	[Founder]	01 Mar 2021

Beneficial Owners Information 受益人信息		
Identification no. 身份證明文件號碼	Name of Beneficial Owner 受益人全名	Nature of Beneficial Ownership 受益人所有權的性質
X018203(4)	CHAN Kwok King	Significant Controller

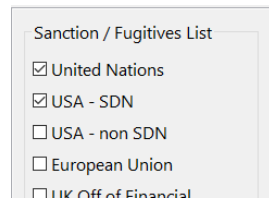
Updated Item 更新項目 (4) To make it more convenient for users, the updated version has the option to combine the "Save" and "Print" functions into one for the results of the Sanction/Fugitives Check operation.

為方便用戶，更新後的版本可以選擇將制裁及被通緝查核結果的“保存”和“打印”功能合二為一。



Updated Item 更新項目 (5) Once you had made the selection of the Sanction/Fugitive lists you needed, the system will remember it instead of repeating the choices every time.

一旦您選擇了所需的制裁及被通緝清單，系統就會把它記住，無需每次都重複選擇。



How to speed up the sanction search for the whole database of clients and entities?

對整個客戶和實體數據庫作制裁名單搜索時，如何加快速度？

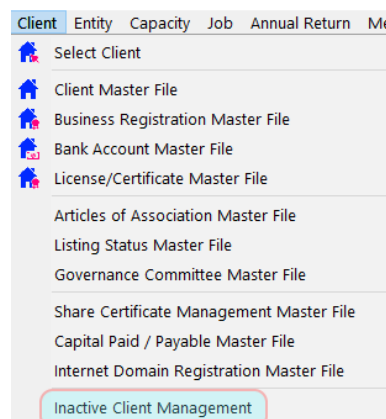
We have received reports from users about the time spent on sanction search, especially for a weekly or monthly whole database search. Upon receiving the users' reports, we looked at the source of the problem. We found out that in all cases, the slowdown is caused by outdated client records that are idled and filled with old data that may not comply with the newer data format. This kind of inactive CSA client records are hidden in daily CSA operations. The direct way to solve this problem is to set the status of these idled clients as "Inactive". By doing so, the AML system for CSA will ignore the inactive clients during sanction search and will deliver a faster result.

我們收到了用戶關於制裁搜索所花費時間的報告，尤其是每週或每月的整個數據庫搜索。在收到用戶的報告後，我們查看了問題的根源，發現在所有情況下，速度減慢都是由過時的客戶記錄引起的，這些記錄被閒置並裝載了可能不符合新數據格式的舊數據。這種不活躍的 CSA 客戶記錄隱藏在日常的 CSA 操作中。解決這個問題最直接的方法是將這些被閒置的客戶的狀態設置為「不活躍」。這樣，AML system for CSA 將在制裁搜索期間跳過不活躍的客戶，從而加快提供結果。

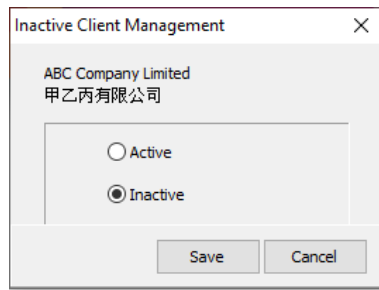
You can follow the following steps in CSA to change the idled client to "Inactive":

您可以按照 CSA 中的以下步驟將被閒置客戶設定為「不活躍」：

- (1) Go to { Client > Inactive Client Management }
前往 { 客戶 > 不活躍客戶管理 }



- (2) Locate the Client and press the [Edit] button
選擇客戶後按下 [更改] 按鈕
- (3) Set the "Inactive" option and press the [Save] button
設定為「不活躍」後按下 [儲存] 按鈕



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We are looking to hire someone who possesses a passion for an IT job and enjoys working with people. If you think you are one of them, please send us your resume to career@plsoft.com telling us about yourself. Strictly confidential.

CSA Support Specialist

- Be problem-solving orientated
- Hands-on experience in using CSA Expert
- Perform User Support (resolve issues for clients via phone or electronically) and Setup Service (standard software installations or updates for clients as needed)
- Provide User Training (introductory training for new users)
- In-house training will be provided for you to perform the above jobs

I.T. Support Specialist

- Be customer-service orientated
- Hand-on experience in trouble-shooting PC, LAN, and Internet problems
- Knowledge of installing MS-SQL, MS Windows, and Linus servers
- Perform in-house hardware/software installation, configuration, and maintenance
- Provide IT supporting and trouble-shooting services for clients as needed

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