Street Manager Guidance for Contractors

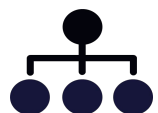# How do Contractors access Street Manager

Key principles

Each LHA / Utility should discuss and agree approach with Contractor

DfT validates Contractor and sets them up as a Contractor organisation in Street Manager using the Contractors' functionality
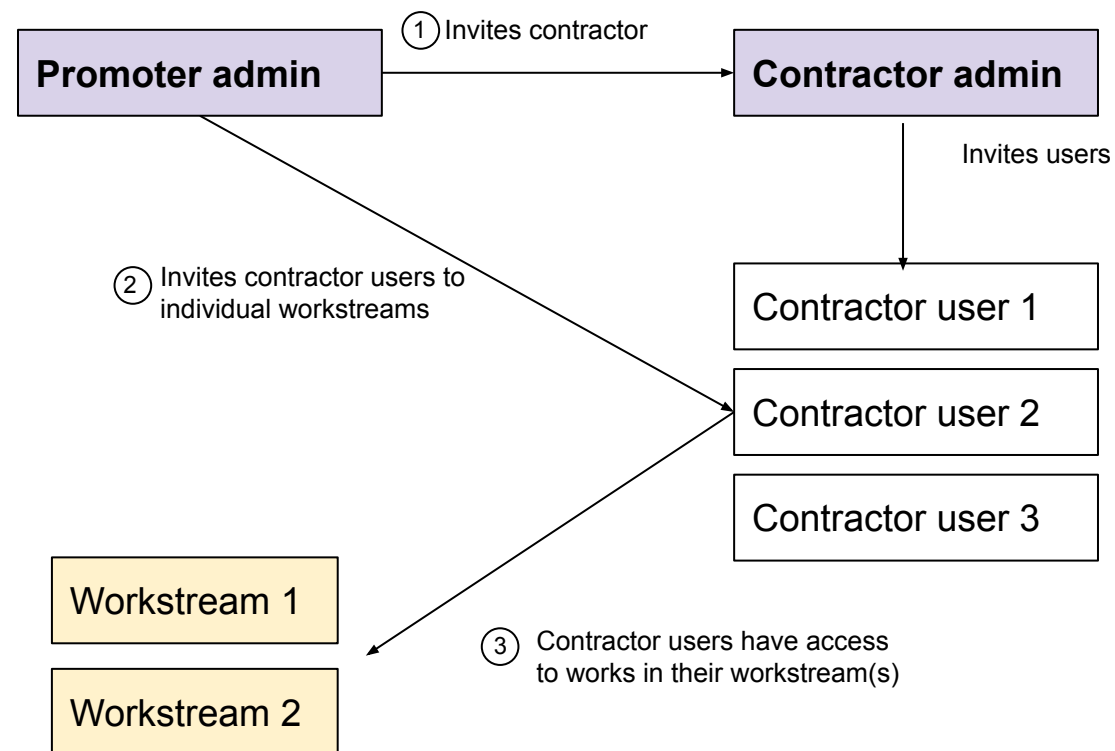
Contractor admin sets up individual users with user accounts

Promoter admin provides access to individual workstreams for each user

Process map

Promoter admin

① Invites contractor

Contractor admin

Invites users

Contractor user 1

② Invites contractor users to individual workstreams

Contractor user 2

Contractor user 3

Workstream 1

③ Contractor users have access to works in their workstream(s)

Workstream 2

NOTE: This guidance covers Contractor services only. If you are also delivering Promoter services, you will need to obtain Promoter login as any other Promoter organisation.

The registration process

For Contractors

1) Email register@manage-roadworks.service.gov.uk to request access, providing Primary contact details (full name, email, job title, contact number) and details of the Promoters/HAs you raise permits on behalf of.
2) Street Manager replies with the contractor onboarding pack.
3) Return signed T&Cs and Admin details.
4) Street Manager contacts the relevant Promoter(s)/HA(s) to verify that contractor works for them.
5) Contractor admin invites users.

For Promoters/HAs

1) Contact all Contractors who carry out works on your behalf and ensure that they have followed steps 1 - 5 for Contractors.
2) Select Contractor within Street Manager
3) Set-up user permissions (edit or read-only) for each workstream.

Street Manager user permissions

Workstream	Permission Profile	
	User A	User B
	Full Access	**View Only**
001	✔ No restrictions for workstream 001	✔ View only in lists for workstream 001
002	✔ No restrictions for wokstream 002	✔ View only in lists for workstream 002
003	✘ 3rd party access for 003 (view only from map)	✔ View only in lists for workstream 003
004	✘ 3rd party access for 004 (view only from map)	✘ 3rd party access for 004 (view only from map)
Overall	Able to create permits, reinstatements etc. for all workstreams allocated to them	Applications for all allocated workstreams visible in lists but cannot be edited

All non-admin users of Street Manager (including Contractors) will be assigned a Permissions Profile and set of workstreams.

The admin for the Promoter will be responsible for providing users with permissions access by workstream.

User types
- User A has full access to workstreams 001 and 002. They have access only to the map view of workstreams 003 and 004.
- User B has view only access to workstreams 001, 002 and 003. They have access only to the map view of workstream 004.

Confirmed Contractor functionality

Key scope points relevant to the Contractor functionality that will be developed in the Street Manager User Interface

Associate users to workstream
- The admin of a promoter will be able to associate individual users, from their own organisation or a contractor, to individual workstreams.
- Contractor admins cannot associate individual users to workstreams.

Provide user with full write or read-only access for organisation
- You could set up a user to have read-only access to everything e.g someone who works in your call center for instance. Or set up read only access for workstreams 101 and 102 because they are a supervisor for your contractor.

Restrict access by workstreams to the work record
- Users will only be able to see the work record for workstreams they have access to. You will be able to use the map and see the permit details, but not then access the work record as you can currently in the sandbox environment.

Restrict access to work record when not associated with organisation/workstream
- This is connected to the previous point. Even if you try and guess the URL based on the formula we use where the works ref forms part of it, you would get an error message if you don't have access.

Associate all users from contractor org with promoter org (but defaulted to access to no workstreams)
- This simply means a promoter admin can review a list of contractor users who by default can only view your works via the map and give them access.

API
- We will support contractor functionality through the API and will be treating API users the same as regular users, assigning them to workstream.

Key takeaways

1 You have total control over how your contractors access your organisation's data. You can limit or extend access by setting permissions, exactly the same as for your own users.

2 Contractors can be added directly in to your organisational set-up, but they won't then be able to work for another organisation using the same email address. If possible, set them up with an internal email account.

3 By default, contractor users have no access. The Promoter admin must add them to the relevant workstreams.