# Street Manager Transition Guidance

Contractors

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How can Contractors get on Street Manager

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.

DEFAULT
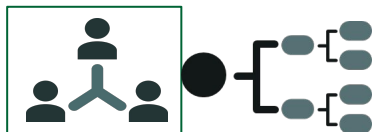
### OPTION 1: USING THE CONTRACTORS' FUNCTIONALITY IN STREET MANAGER

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

Promoter admin provides access to individual workstreams

Today all Contractor users have visibility of works related to **all** LHAs/Utilities they work with. **By April 2020 functionality will be developed as per next slides ****

LIMITED ACCESS
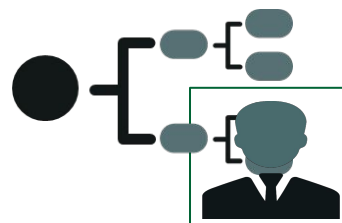
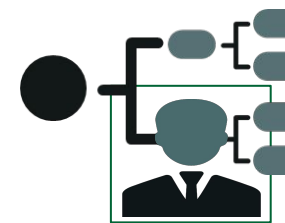### OPTION 2: LHA / UTILITY SETS UP INDIVIDUAL PEOPLE AS CONTRACTORS

Each LHA / Utility should discuss and agree approach with Contractor and communicate this to DfT Street Manager via email if this option is the preferred

If a LHA/Utility wants to restrict access, they can add individual contractor people as part of their organisation

LHA/Utility admin sets up individual contractor user accounts associated with a real email - as if they are setting up individuals working in their own organisation

Individual contractor people have visibility **only** of the works related to the LHA/Utility that has set them up as part of their organisation in Street Manager **

LIMITED ACCESS

OPTION 3: LHA / UTILITY SETS UP CONTRACTOR AS AN ADMIN

Each LHA / Utility should discuss and agree approach with Contractor and communicate this to DfT Street Manager via email if this option is the preferred

If a LHA/Utility wants to restrict access, they can add individual contractor people as Admins

The Admin (from Contractor organisation) then sets up the users from the Contractor organisation

Individual contractor people have visibility **only** of the works related to the LHA/Utility that has set them up as part of their organisation in Street Manager **

** Functionality will be updated before April 2020

Confirmed contractor scope for April

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.
- There will be the ability to create restricted accounts.

Permission Profile

Workstream	User A — Full Access	User B — View Only	User C — Limited Access
001	✓ No restrictions for wokstream 001	✓ View only in lists for workstream 001	✗ 3rd party access for 001 (view only from map)
002	✓ No restrictions for wokstream 002	✓ View only in lists for workstream 002	✗ 3rd party access for 002 (view only from map)
003	✗ 3rd party access for 003 (view only from map)	✓ View only in lists for workstream 003	✓ Full access except unable to action FPNs or S81s
004	✗ 3rd party access for 004 (view only from map)	✗ 3rd party access for 004 (view only from map)	✓ Full access except unable to action FPNs or S81s
Overall	Able to create permits, reinstatements etc. for all workstreams allocated to them	Applications for all workstreams allocated to visible in lists but cannot be edited	Similar permissions to Full Access but with ability to action FPNs and S81s removed

User types
- For April we will be able to serve the needs of User A (access to some work streams and not others) and User B (read-only, list view access to workstreams) .
- In time we will also be able to serve User C (access to given work streams but without the ability to access FPNs and/or Section 81s.)
- One need we also will be able to serve in time is the ability for users to have read only access to some workstreams and write access to others.

A user 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. This principle is the same for providing contractors access to an organisation.

Note; this is the planned approach for permissions management and will be implemented in a phased approach. Exact specification of profiles may change as designs are finalised

How can a contractor register for Street Manager using Option 1 - Contractor functionality

If you are going with the default Option 1 (Using the Contractor functionality in Street Manager), you are setting up the Contractor (e.g. Contractor PLC) as an organisation in Street Manager. That means that for this organisation we will need:
- Primary contact
- Admin contact

The Admin will set up the individual user profiles following which the Promoter/HA admin can add them to workstreams in their organisation (note this functionality will be available in 2020, before April. We will notify everyone when this is developed)

Each contractor organisation will need to be validated by a Promoter/HA organisation, so that DfT Street Manager can link the organisations when setting up the Contractor PLC organisation.

There are two routes to register a Contractor organisation in Street Manager, both of which are acceptable:

Route 1: Contractor PLC emails Street Manager to request access

1. Contractor PLC emails register@manage-roadworks.service.gov.uk to request access and provides the Contractor Primary contact details (full name, email, job title, contact number) and the names and contact details of the Promoters/HAs they raise permits on behalf of
2. Street Manager contacts the Contractor PLC Primary contact and sends them the additional Contractor onboarding pack including T&Cs that need to be signed and Admin information that needs to be provided
3. Contractor PLC returns Admin details and signed T&Cs
4. Street Manager contacts the Promoter(s)/HA(s) to verify that Contractor PLC works with them
5. Street Manager gives access to the designated Contractor admin(s), who can then provide access to the users in Contractor PLC

Route 2: Promoter / HA requests Street Manager to set up Contractor PLC

1. Promoter / HA raises a support request via the self-service portal (https://streetmanager.atlassian.net/servicedesk/customer/portal/1) to add Contractor PLC and provides the Contractor Primary contact details (full name, email, job title, contact number)
2. Street Manager contacts the Primary contact and sends them the additional Contractor onboarding pack including T&Cs that need to be signed and Admin information that needs to be provided
3. Contractor PLC returns Admin details and signed T&Cs
4. Street Manager gives access to the designated Contractor admin(s), who can then provide access to the users in Contractor PLC