

## System/Telephony - Set Up Access

Team leaders and above will be responsible for submitting user set up and amendment requests for the 2012 scheme IT system.

This procedure will explain how a team leader submits a request to set up a new user or amend an existing user on the 2012 scheme.

Department for Work and Pensions Information Technology (DWP IT) service desk is responsible for actioning user set up and amendment requests on the 2012 scheme. The Area Business Operational Model (BOM) team, will continue to perform this function for 1993/2003 systems. They will not act as a validation point for the 2012 scheme operational requests.

The 2012 scheme comprises of a number of information technology (IT) systems including the three main child maintenance computer systems and telephony.

Team leaders will not have to specify individual systems when requesting access as this is defined by the job that the user does within the CMG, (their Organisational Design Role).

The user access form can be used if telephony access needs to be amended, deleted, suspended or de-suspended as long as there is a genuine reason for the amendment. This process can also be utilised if access to the extract data functionality on CMS2012 is required however when completing the form the user will need to specify the reason for needing to utilise this functionality as it has been disabled to reduce any chances of client data ending up in the public domain.

It will remain the team leader's/segment manager's responsibility to remove access to 1993/2003 systems, inboxes, shared areas etc. where appropriate when they are requesting a user is set up on 2012 system.

If a user's role requires them to have access to TSIEM, Informatica, SAS, Sage, or OPA they need to complete the CMUA14 Licensed Software Form to request this.

If the request is for access to TSIEM this needs to be approved by the security advisor manager. All requests for access to the other systems should be sent to the CMG IT support team in the usual way.

To set up a new user on the 2012 scheme, the team leader or above will complete the details, authorise and email the form. Self authorisation is not permitted.

A fundamental titled CMS Work Management/User Access Overview has been written which may provide more help and information on this subject. You can find it on the fundamentals page [here](#).

## Complete CMG 2012 Scheme User Provisioning Form

### (GB only)



For any Segment Manager change in the BOM, Implementation/Operations must contact Service Management to guide them the Process, by emailing DWP CM Config & Data ManagementTeam

### Team leader/segment manager action



If the change is to move an individual or single team within the same segment, the form needs to be completed and authorised by the segment manager. It must be completed by a team leader/manager at least one grade higher than the user.

If the change is to set up a Caseworker with Team Leader permissions, go to **step 18**.

1. Open form CMG 2012 Scheme User provisioning Form. This can be found in **TechNow**, which is accessed via a desktop icon. Once in TechNow, select **Request Something**, **User Access** and **Applications**.
2. Complete **Section 1 – User's details** by inputting the user's staff number and selecting **Search**. This will populate the user's details automatically. The Approver details will be populated automatically with the Line Manager's details. The Magnifying glass can be used to search for an alternative approver, providing they have Line Manager responsibility.

- Complete the **Is it required before a date/time?** field by choosing an appropriate date and time and selecting the green tick icon.

 Ensure that the users work queue is empty of any work items the night before the date from which the change is required.

- Complete the **Organisational Design Role** Section, by selecting the appropriate **Directorate**, **Department** and **Organisational Design Role** that the user will be moving to. Once you have selected the correct drop down in the **Directorate** field it enables the **Area/Team** field and this in turn enables the **Organisational Design Role** field.
- 2012 Scheme System Access Requirements** select the appropriate dropdown. If selecting **Add** or **Reinstate** go to **step 7**.

 **Add** should only be used for those Users that currently have **no** 2012 System Access.

- Complete **Current Position** with the necessary information in the drop downs. There is an option within the **Caseworker BOM** position to select **Lowest Available**, which should not be used in this section. When completing the **Team** field this must be completed in the format TL followed by 3 digits, e.g Team 12 would be recorded as TL012.
- Complete **New Position** with the necessary information in the drop downs. There is an option within the **Caseworker BOM** position to select **Lowest Available**, if selected, this will automatically assign the caseworker with the lowest position available. When completing the **Team** field this must be completed in the format TL followed by 3 digits, e.g Team 12 would be recorded as TL012.

 Where an Operational team / caseworker position is not required, the form will not accept the default of None. In these instances, TL999 and CW020 should be used with a note in the Further Information field to state that No Team Leader or Caseworker position is required - please assign a relevant Dummy Position for the requested ODR instead.

- If an additional BOM position is required select **Yes** in the drop down. The secondary BOM requirements will appear as Additional Positions. You will need to complete the **Role**, **Segment** and **Team** for each **Additional Position**. For more information refer to [Secondary Access](#).

 The maximum number of additional positions recommended is 10.

 For secondary access - hierarchical you must have received authorisation from the receiving segment's manager saying the user can have access to their team.

- Complete the **Telephony** section. Select the relevant field from the drop downs.

 **Verint**, **Opmis** and **CC Pulse** should only be selected for Team Leader's or above.

- If this is the only User Provisioning form required for submission proceed to **step 13**.
- Return to the top of the form and select **Add to Cart**. For a second User edit the details on the displayed form by repeating the steps above.
- Once all forms required have been completed, select **Order Now**.
- In your Shopping Cart, all items required are displayed. Select **Checkout**.

 Selecting the **Item** listed will provide details of the form submitted. If the User submitting the form is the Approver, the form will automatically be approved. If the Approver is not the User completing the form, the Approver will receive an email asking them to Approve. Once approved, the form will route directly to **DWP IT**.

## Editing a Previously submitted form

- Find the previously submitted form. This can be found, opening TechNow, selecting **Check Status** and **My Requests**.
- Open the previously submitted form, by selecting the required **Request Number** link and then the form name in the **Description**.
- Select the form name in the **Description** and **Copy to Cart**.
- From the **Cart** select **Edit** and complete **steps 2 to 13**.

## Setting up a Caseworker with Team Leader permissions

 Only one caseworker per team can be set up with Team Leader permissions.

18. Follow **steps 2 to 13**. At **Step 4**, ensure that the Caseworker has a Team Leader ODR within the **Organisational Design Role** field.
19. **Step 5** should be completed as **Amend**.
20. At **steps 6**, both the Current and the New positions must be the Caseworker's current **Caseworker** role and position
21. Enter '**only change is to ODR and Secondary Access**' in the further information field.
22. At **step 8**, enter Secondary Access requirements as the Team Leader for their current team.

 The caseworker should not be set up with Secondary Access for any position outside of their WorkGroup.

23. Continue with **steps 9 to 13**.

## User set up by CMG IT service desk

1. The change should take place within three days. Where the User has selected **TL999** as the **Team** please take note of the **Further Information** field.

 For more information refer to [2012 System Overview](#) and [Secondary Access](#).

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## Complete CSUAP30 and forward (for NI only)

### Team leader/segment manager action

 If the change is to move teams within the same segment, the form needs to be completed and authorised by the segment manager. It must be completed by a team leader/manager at least one grade higher than the user.

1. Open form CSUAP30. This can be found within the **Forms Portal**, which is accessed via a desktop icon.
2. Complete **Section 1 – User's details** by inputting the user's staff number and selecting **Search**. This will populate the user's details automatically. You need to manually select the correct grade in the drop down.
3. Complete **Organisational Design Role** the user will be moving to. Once you have selected the correct drop down in the **Directorate** field it enables the **Area/Team** field and this in turn enables the **Organisational Design Role** drop down.

 Note that if there is not an exact design role listed on the drop down you will need to choose the most appropriate HR role for the position.

4. In **Section 2 – 2012 Scheme System Access Requirements** select the drop down for user or team depending on if you are requesting set up for a user or team. Complete the **Effective Date Action Required** fields.

 If you select **Amend, Suspend, Reinstate** or **Delete** in the action required field it populates an alert box asking if the user currently has CMS2012 access. If you select **No**, the form will clear as it is not possible to complete these actions without existing access. On selecting **Yes**, more fields which will enable you to input the user's current CMS2012 BOM position. You also need to complete the **Cost Centre** and **Priority** drop downs.

 Ensure that the users work queue is empty of any work items before attempting to amend or delete their profile.

5. Complete **Primary BOM Position** with the necessary information in the drop downs. There is an option within the **Caseworker BOM** position to select **Lowest Available**, if used this will auto select the lowest position possible within the team and fill any gaps if necessary.
6. If an additional BOM position is required select **Yes** in the drop down. You will need to complete the **Secondary BOM Requirements** sheet. The secondary BOM requirements sheet will appear on **tab 2** on the excel workbook once a secondary position is requested. It remains hidden until this point. It is completed in the same way as the **Primary BOM Position** section at **step 5**. For more information refer to [Secondary Access](#).

 Security clearance is needed for more than two positions. If your request is to add more than 2 positions or if the request will add a third, fourth position etc. to the user then you will need to seek authorisation.

7. If the user is an accessibility solutions user, select the correct option from the drop down list. Selecting **Yes** gives another drop down to remind you that a CSUA14 has to have been completed and submitted requesting the appropriate software and to obtain your assurance that this has been done.
8. Complete **Section 3 – Telephony Applications** section. Select the relevant field from the drop downs.
  -  For secondary access - hierarchical you must have received authorisation from the receiving segment's manager saying the user can have access to their team.
9. Enter the physical location for the user and select the relevant dropdown to give the required level of telephony access.
10. **Section 4 – Authoriser Details**. When you select the **Authorise** button it automatically populates your details. You need to select the correct grade from the drop down and once you have selected the correct drop down in the **Directorate** field it will enable the **Area/Team** field and this in turn will enable the **Organisational Design Role** drop down.
11. You now need to read the statement and confirm that you meet the criteria to request the user set up by selecting **Yes**. If you do not meet the criteria you will need to refer the request to someone who does.
12. **Section 4 – IT Services** will be completed by IT once they receive the form.
  -  An email will automatically generate with the form attached. For any secondary access - hierarchical, global Verint or global Opmis requests, you need to state that you have received the required authorisation. You then need to send the email to the CMG IT service desk.

### User set up by DWP IT service desk

13. The change should take place within three days, but may take longer.
  -  For more information refer to [2012 System Overview](#) and [Secondary Access](#).

[2012 System Overview](#)

[Secondary Access](#)

 [CSUAP30 2012 Scheme - User Provisioning form](#)