

# PEARS - Team Setup and Access Guidance

## Introduction

Whether undertaking a new Data Check, Licence Application, Rectification or Restatement team and access rights are setup in exactly the same way.

The example below shows the steps you need take to setup a team and assign access for a new application.

## Setting up a Team

Once an Application has been created (see section 4.2.1 of main PEARS user guidance) the Application Manager is required to populate the team with the people who are going to process the application. The Application Manager will have an action to 'Manage Application' in their work basket.

Transaction / Ref	Subject / Topic	Company	Status / Date	Information	Actions
Guidance	Licence Transaction	Applicant: DEMO OIL LTD ()	DRAFT Planned Date: 31-OCT-2012	Manage Application Licences	<a href="#">Manage Application</a> <a href="#">Delete Application</a>

The 'Manage Application' link will take the Application Manager to the 'Team Management' screen where they can add individuals to the team by clicking the 'Add Person' button.

The screenshot shows a navigation bar with buttons for 'Manage Team', 'Add/Remove Licences', and 'Assign/Re-Assign Case'. Below this is a 'Show All Details' link and a 'Refresh' link. A horizontal menu contains roles: 'Central Contact Details', 'Application Access Manager', 'Application Editor', 'Application Submitter', 'Application Executor', 'Application Contact', and 'Application Viewer'. At the bottom, there are buttons for 'Save Contacts', 'Add Person', and 'Copy Team'. The 'Add Person' button is highlighted with a red box.

The Application Manager now has two options; they can either add themselves by clicking on the 'Add Me' button or enter the details of the people they wish to add to the team by clicking on the 'Add Person' button.

The 'Add Person' form has a blue header. Below it, instructions state: 'Please enter an Email Address, Forename and Surname of the person you want to add then click Add Person. The values entered must all match those of the person you would like to add. If a match cannot be found, the best suggestion will be presented, at which point you may accept the suggestion, or create a new record with your entered values.' The form contains input fields for: '\*Email Address', '\*Forename', '\*Surname', '\*Organisation', and '\*Telephone Number'. Below the form are 'Add Person' and 'Cancel' buttons. A '- OR -' separator is followed by the text 'You may select yourself as the person' and an 'Add Me' button. The 'Add Person' and 'Add Me' buttons are highlighted with red boxes.

Once people have been added to the team the Application Manager can then assign them to a role(s) (for more details on the roles please see the 'Security, accounts and roles' document which is available on the PEARS Webpage).

To add a person to a role the Application Manager will need to check the relevant box(s) against the user's name.

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Manage Team   [Add/Remove Licences](#)   [Assign/Re-Assign Case](#)

[Show All Details](#) [Refresh](#)

Central Contact Details	Application Access Manager <i>i</i>	Application Editor <i>i</i>	Application Submitter <i>i</i>	Application Executor <i>i</i>	Application Contact <i>i</i>	Application Viewer <i>i</i>
Test User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save Contacts   Add Person   Copy Team

To add additional users, the Application Manager needs to click on the 'Add Person' button and repeat the process until the team is complete. Once the team has been set up the Application Manager needs to click on the 'Save Contacts' button.

Manage Team   [Add/Remove Licences](#)   [Assign/Re-Assign Case](#)

[Show All Details](#) [Refresh](#)

Central Contact Details	Application Access Manager <i>i</i>	Application Editor <i>i</i>	Application Submitter <i>i</i>	Application Executor <i>i</i>	Application Contact <i>i</i>	Application Viewer <i>i</i>
Test User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Test User2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Contacts   Add Person   Copy Team

When saving the team, the Application Manager will be asked if he/she would like an email sent to users informing them of their new access. If the Application Manager does not wish to send an email, they will need to un-tick the check box before saving.

On saving, the following users will be informed of their new roles unless you opt to not inform them.

Full Name	Send Email?
Test User2	<input checked="" type="checkbox"/>

Would you like to save your changes?

Yes   No

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## Assigning Case

Once the team has been set up and the licence(s) added The Application Manager needs to assign the case to a member of the application team by clicking on the 'Assign/Re-assign Case' tab.

The screenshot shows a navigation bar with three tabs: 'Manage Team', 'Add/Remove Licences', and 'Assign/Re-Assign Case'. The 'Assign/Re-Assign Case' tab is highlighted with a red box. Below the tabs, there is a 'Show All Details' link on the left and a 'Refresh' link on the right. The main content area is a table with columns for roles: 'Central Contact Details', 'Application Access Manager', 'Application Editor', 'Application Submitter', 'Application Executor', 'Application Contact', and 'Application Viewer'. Two rows are shown: 'Test User' and 'Test User2'. Checkmarks are present in the 'Application Editor' column for both users. Below the table are three buttons: 'Save Contacts', 'Add Person', and 'Copy Team'.

There are now three options;

1. 'Pass Forward to Editor', the case will be assigned to any member of the application team with the Application Editor role.
2. 'Reassign To New Manager', the case will be assigned to a new Application Manager who will take control of the management of this case.
3. 'Take Ownership and Process', this automatically adds the Application Manger to the team and assigns all roles.

This screenshot shows the 'Assign/Re-Assign Case' tab selected. Below the navigation bar, there is a table with two columns: 'Assignment Title' and 'Currently Assigned To'. The 'Assignment Title' is 'Application Manager' and the 'Currently Assigned To' is 'pbuckfield (Mr Paul Buckfield)'. Below this table are three buttons: 'Pass Forward To Editor', 'Reassign To New Manager', and 'Take Ownership and Process'. These three buttons are highlighted with a red box.

This screenshot shows the 'Pass Forward To Editor' dialog box. It has a title bar with the same three buttons as the previous screenshot. The dialog box contains a label '\*Application Editor' followed by a dropdown menu currently showing 'Select One'. Below the dropdown, there is a list of three options: 'Test User (test.user@demo-oil.com)', 'Test User2 (test.user2@dummyoil.com)', and 'Test User2 (test.user2@dummyoil.com)'. To the right of the dropdown are 'Submit' and 'Cancel' buttons. The entire dialog box is highlighted with a red box.

Once the case has been assigned, a Workbasket action to process the Application will be received by the assigned user.

Transaction / Ref	Subject / Topic	Company	Status / Date	Information	Actions
Guidance	Licence Transaction P1809	Applicant: DEMO OIL LTD ()	DRAFT Planned Date: 31-OCT-2012	Application Started	<a href="#">Resume Application</a> <span>New</span> <a href="#">Delete Application</a> <span>New</span>