

# Guidance Leaflet

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## CIS TLS 5.1

### Manage Requests

- **RA Manager**
- **RA Agent**
- **Sponsors**

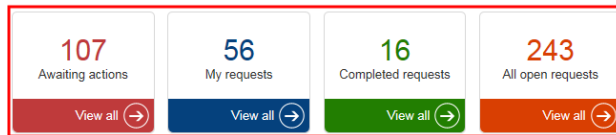
## Manage Requests

### RA Managers / RA Agent / Sponsors

Any action taken in the CIS system is called a 'Request' and evidence of the action can be found by 'viewing requests'.

There are four menu categories of 'Requests' which are displayed on the Dashboard 'landing page'; the view of which will depend on the current role of the user when logged in.

- Awaiting Actions
- My Requests
- Completed Requests
- All Open Requests



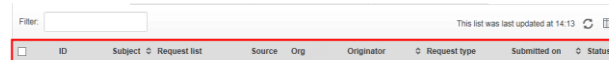
Selecting Requests (from the menu) or the required 'view' will display a list as described.

The action – to **Approve, Grant or Reject** a particular Request – will depend on the originator and Request type.

- **RAM / RAA** can action 'Create' or 'Modify' users and 'Access' requests from ESR / Sponsors / other RA and RA-ID Checkers.
- **Sponsors** can submit a Request to 'Create' a user, assign or modify 'Access' or action requests from RA Officers. (see leaflets PPL 1.2 / ACP 2.3)

Further details can be obtained by clicking the relevant **hyperlink** – for the Request 'ID'; the 'Subject' or 'Originator' detail can be viewed.

The list can be filtered and headings will be displayed (this is configurable).



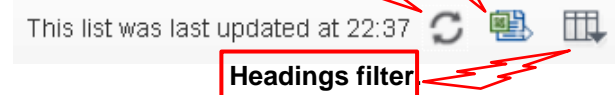
To enable effective management of Requests then there will be a **'SYS\_DEFAULTREQUESTLIST'** or the local RA team will have assigned specific 'Request List' identifiers, such as 'GP-USERS'.

The Request type and Status indicate the next required action, e.g.

| Request type               | Submitted on      | Status |
|----------------------------|-------------------|--------|
| Create user                | 15-Feb-2015 21:18 | PG     |
| Modify Position assignment | 15-Feb-2015 19:22 | RJ     |

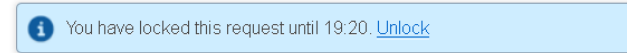
- PG = Pending Grant
- PA = Pending Approval
- CP = Completed
- RJ = Rejected
- SYP = Sync in progress

The list can be **refreshed** and **exported** to .csv file if required.



Opening the Request will allow the next steps to be actioned or rejected by selecting the related 'ID' **hyperlink** and will display the relevant message and 'lock' the request.

Modify Position assignment Request: 00004908

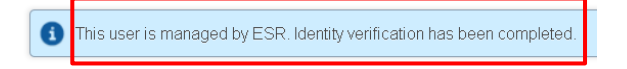


Any error messages will be displayed if appropriate.

Modify Position assignment Request: 00004892



Requests from the ESR system as the 'source' will be identified – when selected:



The follow on actions will depend on the 'Request type' such as:

- Issue Smartcard Later
- Create User
- New Position Assignment
- Modify Position Assignment
- Rejection will require a reason and notes.

