

Creating a Test User (PDF)

This is a step-by-step process for creating a test user for CCT testing.

Account Set Up

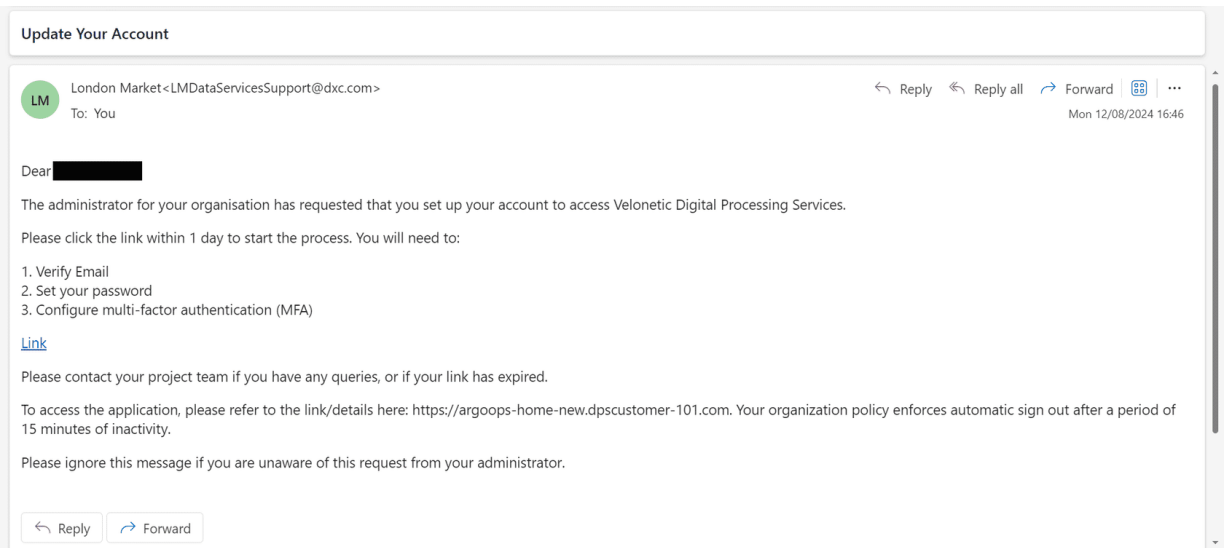
These are the steps the Admin User needs to complete before setting up Test Users.

1

The Admin User will receive an email from **LMDDataServices Support** with the subject line '**Update Your Account**'.

2

Click the link in your email within **24 hours** to set up your account. You will need to verify your email, set your password and configure MFA.



Account Login

3

Once you have set up your account, visit this link <https://argoops-home-new.dpscusercontent-101.com> (or copy and paste into your browser) to access the Parties portal.



We recommend opening this in **Incognito** (Google Chrome), or **InPrivate** (Microsoft Edge) to enable you to close your session.

4

Enter your **username** (your email address) and **password** on the login page.

5

Click '**Sign In**' to log in to your account.



Digital Processing Services

Username

Password

Remember me [Forgot Password?](#)

This computing system is a company owned asset and provided for the exclusive use of authorized personnel for business purposes. All information and data created, accessed, processed or stored using this system (including personal information) are subject to monitoring, auditing or review to the extent permitted by applicable law. Unauthorized use or abuse of this system may lead to corrective action including termination of employment, civil and/or criminal penalties.

Your organization policy enforces automatic sign out after a period of 15 minutes of inactivity.

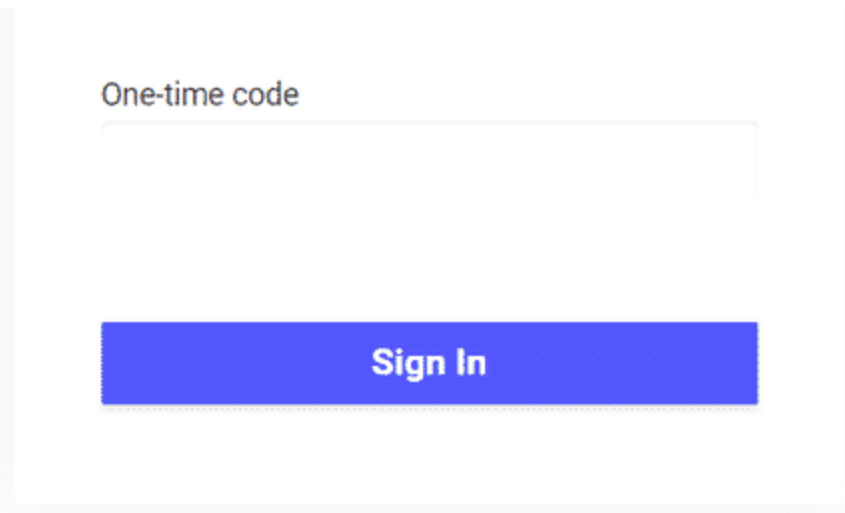
Sign In

6

Enter the **One-time code** from the authenticator OTP app. This should not include any spaces if shown in your authenticate app.

7

Click '**Sign In**' again to access your account.



A screenshot of a web form for signing in. At the top, the text "One-time code" is displayed above a large, empty rectangular input field. Below the input field is a prominent blue button with the white text "Sign In".

Party Details

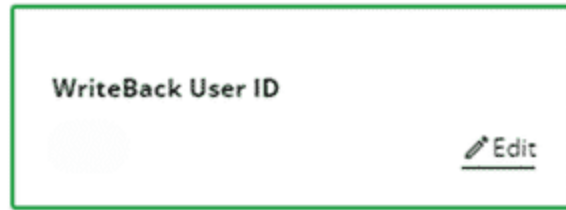
8

Click either '**Add New Party**' at the top right or '**Onboarding**' in the left menu.



9

Enter the **Writeback User ID** for the Test User. This option will only appear for carriers that use the Writeback Service.



The image shows a rectangular input field with a green border. Inside the field, the text "WriteBack User ID" is displayed in a bold, black font. In the bottom right corner of the field, there is a small icon of a pencil followed by the word "Edit" in a smaller font.



You can overwrite this in the users profile if you make a mistake.

10

Enter the **first name, surname, and job title** of the test user.

11

Enter the effective date. This is the date when you want these details to be valid. It must be today's date or a date in the future; it cannot be a date in the past. You can leave the end date blank.

12

You are able to select the checkbox to auto-populate the same valid Effective period dates across all sections and pages associated to this party person.



If you have input the incorrect date and clicked auto-populate, you can change the date, which will allow you to repopulate the dates with the newly chosen date.

Party onboarding

Type

Party Details

Forename

Surname

Job Title

Effective period

From

Day Month Year

To

Day Month Year

Auto-populate Effective period dates

Select the checkbox to auto-populate the same valid Effective period dates across all sections and pages associated to this party person.

Contact Details

13

Select the appropriate **telephone number type**.

14

Enter the **11-digit telephone number** of the test user. The telephone number should not include any spaces. This field is optional.

15

Enter the effective date. You can leave the end date blank.



If you have selected the checkbox to auto-populate this information, the system will have already filled it in for you.

Contact Details

Telephone Number Type

Select ▼

Telephone Number

Effective period

From

Day Month Year

To

Day Month Year

16

Enter the **email address** of the test user.

17

Enter the effective date. You can leave the end date blank. If you have selected the checkbox to auto-populate this information, the system will have already filled it in for you.

Email Address

Effective period

From

Day Month Year

To

Day Month Year

18

Click '**Validate**' and then click '**Save & Next**'.

Cancel

Validate

To proceed please validate your form.



Once you click '**Save & Next**', a record will be saved in the system. If you abandon the session afterward, you will need to contact the CCT Team to void the entry, as a record will have been saved against that email address.

It may take a while for the system to complete the 'Save & Next' action. **DO NOT** click this button multiple times, as this will save duplicate records against the test user's email address, which means you will be unable to proceed.



If this occurs, please contact Velonetic Onboarding at **onboarding.velonetic@dxc.com** to void the entry. Be sure to include the email address of the test user you attempted to add in your email, along with any screenshots that might help diagnose the issue.

Party Person Agreement

19

The **agreement type** is preselected by default and cannot be changed.

20

The **agreement reference** is optional.

21

Enter the effective date. You can leave the end date blank. If you have selected the checkbox to auto-populate this information, the system will have already filled it in for you.

Party Person Agreement

Agreement Type

EMPLOYEE_OF

Select an existing Party Organisation

Agreement Reference (optional)

Effective period

From

Day Month Year

To

Day Month Year

Party Person Market Agreement

22

Select a **market** from the drop-down list.

23

Enter the effective date. You can leave the end date blank. If you have selected the checkbox to auto-populate this information, the system will have already filled it in for you.

Party Person Market Agreement

Market

Effective period

From

Day Month Year

To

Day Month Year

[⊕ Add Additional Market Agreement](#)

Party Person Access Group

24

Select an **access group** from the drop-down list.



If you are setting up a broker (including a service company) or a carrier, the four access groups below are the standard profiles needed for brokers and carriers.

Broker Access	Carrier Access
Broker	Carrier
IMR_Broker	IMR_Carrier

Broker Access	Carrier Access
<p>Broker_view_premiums (IPOS)</p> <p><i>Previously known as Process_enquiry_Broker</i></p>	<p>Carrier_view_premiums (IPOS)</p> <p><i>Previously known as Process_enquiry_carrier</i></p>
<p>Broker_queries</p> <p><i>Previously known as Process_query_Broker</i></p>	<p>Carrier_queries</p> <p><i>Previously known as Process_query_carrier</i></p>

25

Enter the effective date. You can leave the end date blank. If you have selected the checkbox to auto-populate this information, the system will have already filled it in for you.

26

Click '**Validate**'.

Party Person Access Group

Access Group

Effective period

From

Day Month Year

To

Day Month Year

[+ Add Additional Access Group](#)

Cancel

Validate

To proceed please validate your form.



Once you click 'Validate', the **'Add Additional Market Agreement'** and **'Add Additional Access Group'** buttons will become active.

Additional Access Group

27

If you have additional access groups to add, click **'Add Additional Access Group'**.

28

Select the additional access group you require.

29

Scroll to the bottom of the page and click '**Validate**'.

30

Repeat **steps 27-29** until you have added all the applicable access groups.

Additional Market Agreement

31

If you have additional markets to add, scroll **BACK** to the Party Person Market Agreement section and click '**Add Additional Market Agreement**'.

32

Select the additional market agreement you require.

33

Scroll to the bottom of the page and click '**Validate**'.

34

Repeat **steps 32-34** until you have added all the applicable markets groups.

35

Click '**Save & Next**'.

36

The test user's status will change to '**Awaiting Approval**'.



Awaiting Approval

The image shows a button with the text "Awaiting Approval" in orange font, enclosed in a rounded rectangular border with a double-line orange outline. The button is centered on a light gray background.

Test User Approval

Once a new user has been created, they will need to be approved by another administrator within your organisation.

37

The additional administrator will need to log in. After logging in, they will see a list of users on their home page.

38

To find the test user, click on **'Filter by Party Name'** and enter the name of the test user. They can also check the 'Awaiting Approval' box to limit the results to show only users awaiting approval.

Welcome

Filter by Party Name

Status Approved Awaiting Approval Rejected

39

Click on the test user to view the profile details.

40

Click the green button on the right to **approve** the profile creation or the red button to **reject** it.

Action

