



Education & Skills  
Funding Agency

# **Identity and Access Management System (IDAMS) super user guidance**

## **Version 3**

This document provides guidance on how a super user can assign, approve and reject roles and permissions.

**January 2022**

The first person to register from an organisation, for an IdAMS account, will automatically be given super user privileges.

Once you have successfully registered for an IdAMS account, and it has been approved, access IdAMS from the URL <https://logon.fasst.org.uk> and log in to your account

Click on 'My Identity'



From this screen you are able to change your email, your password, and change your password reset preferences.

If you forget your password, access IdAMS from the URL above and select 'I forgot my password', enter your email or username and submit. You will receive an email containing a link to create and confirm a new password.

If you have selected to have your password resets via SMS text message, you will receive a pin number to your mobile


## My Identity

Edit your account details and request permissions

Title	First name	Last name
<input type="text" value="Mr"/>	<input type="text" value="Athin"/>	<input type="text" value="Alias"/>

Email address

Mobile number

 Member of **Department For Business, Innovation And Skills-Skills Funding Agency**. UPIN: 119745 UKPRN: 10033670

[Change password](#)

[Change password reset preferences](#)

## Searching for a user

Once logged in, from the home page, select 'My Team'



The page will display all the users that are currently registered for your organisation. You can also search for a user

The screenshot shows the 'Manage Users' page in IDAMS. The header includes the title 'Manage Users' and a subtitle 'Manage the users of your organisation'. Below the header, there is a green button labeled 'Assign Super Users'. A search bar is highlighted with a red rectangular box. Below the search bar, there is a table with columns for 'Provider Name', 'UPIN', and 'UKPRN'. The table contains one row of data: 'Department For Business, Innovation And Skills-Skills Funding Agency', '119745', and '10033670'. Below the table, there are two tabs: 'All Users' and 'Users Requiring Attention'. The 'All Users' tab is selected. Below the tabs, there is a table with columns for 'Name', 'User ID', 'Email address', and a set of action buttons. The table contains three rows of data:

Name	User ID	Email address	Update User	Delete User	Suspend User
null faa_user1	faa_user1	mark.gwilliam@vattech.co.uk	Update User	Delete User	Suspend User
Pen Test1	ispipentest1	john.north@sfa.bis.gov.uk	Update User	Delete User	Suspend User
Pen Test2	ispipentest2	john.north@sfa.bis.gov.uk	Update User	Delete User	Suspend User

## Assign role permissions

To assign a role to yourself or another user, locate the user, and select 'Update User'

<b>Name</b> null TestRAP1	<b>User ID</b> isp\TestRAP1	<b>Email address</b> TestRAP1	<a href="#">Update User ▼</a> <a href="#">Delete User ✕</a> <a href="#">Suspend User</a>
<b>Name</b> Test RAP2	<b>User ID</b> isp\TestRAP2	<b>Email address</b> Test.RAP2@SFA.bis.gov.uk	<a href="#">Update User ▼</a> <a href="#">Delete User ✕</a> <a href="#">Suspend User</a>

Then select 'Assign A New Permission'

<b>Name</b> null TestRAP1	<b>User ID</b> isp\TestRAP1	<b>Email address</b> TestRAP1	<a href="#">Update User ▼</a> <a href="#">Delete User ✕</a> <a href="#">Suspend User</a>
<b>Name</b> Test RAP2	<b>User ID</b> isp\TestRAP2	<b>Email address</b> Test.RAP2@SFA.bis.gov.uk	<a href="#">Hide Details ▲</a> <a href="#">Delete User ✕</a> <a href="#">Suspend User</a>

[Reset Password](#) [Assign As Super User](#) [Update Contact Details](#)

### Application Roles and Permissions

**Pending**

Approved

Rejected

This user doesn't have any pending application roles or permissions.

[Assign A New Permission](#)

Select 'Add' on the roles you wish to assign (see table on page 14 for more information on the role permissions)

## Assign New Permissions ✕

Please select the permissions you wish to assign to Test RAP2



### Academy Trust Services

Accounts Return Internal Approver

Add

Accounts Return Internal Preparer

Add

### Apprenticeships Service for provider

Apprenticeships Editor

Add

### DCFT

BI Hub User

Add

Data Exchange Service - Provider Information Officer

Add

Data Exchange Service - Provider Submissions User

Add

Once the role has been added, you will see a 'success' message on the bottom left of the screen

✓ Success

'Apprenticeships Editor' has been added for Test RAP2

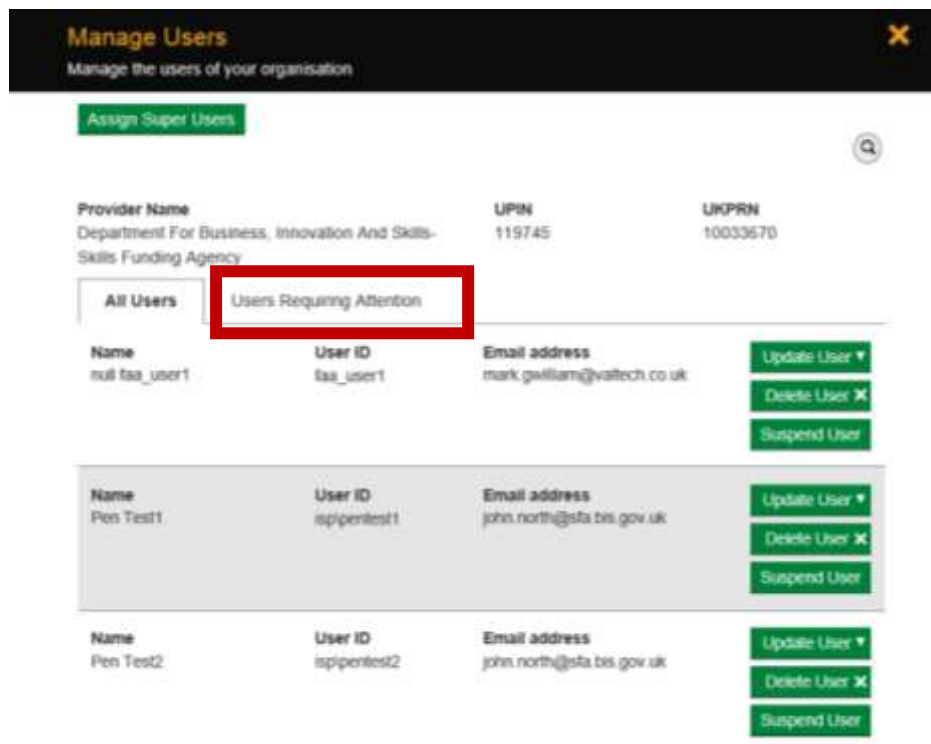
## Approving / rejecting user account and role requests

You will receive an email informing you a user has registered for an account or requested role permissions.

When you log in, you will see a number highlighted in red, showing you have users requiring approval of roles / accounts



Select 'My Team', and the 'Users Requiring Attention' tab



To approve or reject the request, select 'update user'

### Manage Users

Manage the users of your organisation

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#### Users In My Organisation

This is a list of the users in Department For Business, Innovation And Skills-Skills Funding Agency. You can assign users as Super Users of this organisation by clicking the link below.

[Assign Super Users](#)

Provider Name: Department For Business, Innovation And Skills-Skills Funding Agency  
UPIN: 119745  
UKPRN: 10033670

All Users | **Users Requiring Attention**

Name	User ID	Email address	
Mr Athin Alias	ispialiasa		<b>Update User</b> ▼ Delete User ✕ Suspend User
Mr Steven Windmill1	isp/windmill1s		Update User ▼ Delete User ✕

*Pending Account Activation*

Then select 'Approve' or 'Reject'

### Manage Users

Manage the users of your organisation

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All Users | **Users Requiring Attention**

Name	User ID	Email address	
Mr Athin Alias	ispialiasa		Hide Details ▲ Delete User ✕ Suspend User

[Reset Password](#) | [Assign As Super User](#) | [Update Contact Details](#)

#### Application Roles and Permissions

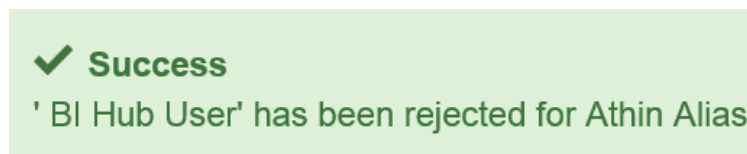
Pending | Approved | Rejected

DCFT			<b>Approve</b> Reject
BI Hub User			Approve Reject
Data Exchange Service - Provider Information Officer			Approve Reject
Data Exchange Service - Provider Submissions User			Approve

If you select the 'Reject' option, a text box will open, where you can enter your reasons for rejection, then select 'send'

The screenshot shows the 'Manage Users' interface. At the top, there is a header 'Manage Users' with a subtitle 'Manage the users of your organisation' and a close button. Below the header, there are two tabs: 'All Users' and 'Users Requiring Attention'. The 'Users Requiring Attention' tab is active. A table displays user information for 'Mr Athin Alias' with columns for Name, User ID, and Email address. To the right of the table are buttons for 'Hide Details', 'Delete User', and 'Suspend User'. Below the table are three buttons: 'Reset Password', 'Assign As Super User', and 'Update Contact Details'. The 'Application Roles and Permissions' section is visible, with tabs for 'Pending', 'Approved', and 'Rejected'. The 'Pending' tab is active. Underneath, there is a section for 'DCFT' and 'BI Hub User'. A large text input box is highlighted with a yellow border, and below it are 'Send' and 'Cancel' buttons.

Once you select 'send', you will see a 'success' message on the bottom left of the screen.



The user will receive an email informing them of the rejection, and containing the information you entered in the rejection text box



To approve the request, select the 'Approve' button

The screenshot shows the 'Manage Users' interface. At the top, there are tabs for 'All Users' and 'Users Requiring Attention'. Below this is a table of users with columns for Name, User ID, and Email address. For the user 'Mr Athin Alias', there are buttons for 'Hide Details', 'Delete User', and 'Suspend User'. Below the table are buttons for 'Reset Password', 'Assign As Super User', and 'Update Contact Details'. Underneath is a section for 'Application Roles and Permissions' with tabs for 'Pending', 'Approved', and 'Rejected'. The 'Pending' tab is active, showing a list of roles: 'BI Hub User', 'Data Exchange Service - Provider Information Officer', and 'Data Exchange Service - Provider Submissions User'. For each role, there are 'Approve' and 'Reject' buttons. The 'Approve' button for 'Data Exchange Service - Provider Submissions User' is highlighted with a red box.

Once you select 'approve', you will see a 'success' message on the bottom left of the screen.

A green banner with a checkmark icon and the text: 'Success' followed by 'Data Exchange Service - Provider Submissions User' has been approved for Athin Alias.

The user will receive an email informing them that the request has been approved

## Assign as Super User

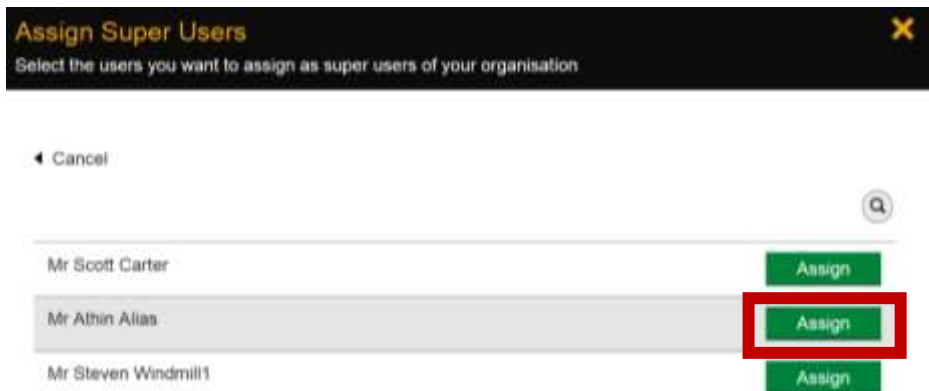
To assign super user permissions to another user in your organisation. Select 'My Team'

The screenshot shows the GOV.UK Information Management Services (IDAMS) dashboard. At the top, there is a 'Log out' button. Below this are three main navigation cards: 'My Identity' (Manage your security settings), 'My Team' (Manage users in your organization), and 'Invite Employee' (Invite another user to register). The 'My Team' card is highlighted with a red box and has a red notification badge with the number '1'.

Then select 'Assign Super Users'



Select 'Assign'



Once you select 'Assign', you will see a 'success' message on the bottom left of the screen.



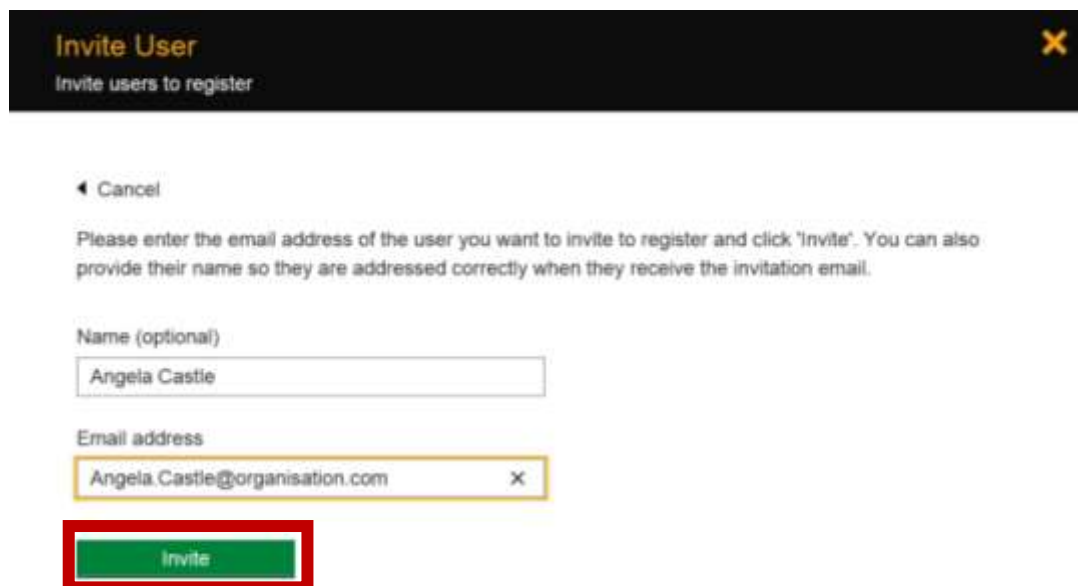
The user will receive an email informing them that they have been assigned as a super user

## Invite Employee to Register

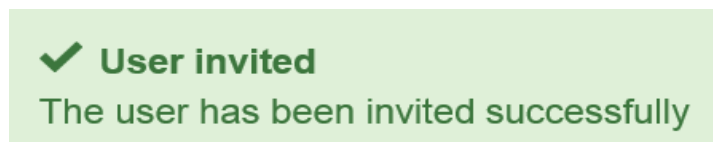
To invite another employee of your organisation to register, from the home page select 'Invite Employee'



Enter the name and email address, then select 'Invite'

The image shows the 'Invite User' form. At the top, there is a black header with the text 'Invite User' in orange and a close button (X) on the right. Below the header, there is a sub-header 'Invite users to register'. The form contains a 'Cancel' link, a paragraph of instructions, and two input fields: 'Name (optional)' with the value 'Angela Castle' and 'Email address' with the value 'Angela.Castle@organisation.com'. Below the input fields, there is a green 'Invite' button, which is highlighted with a red rectangular box.

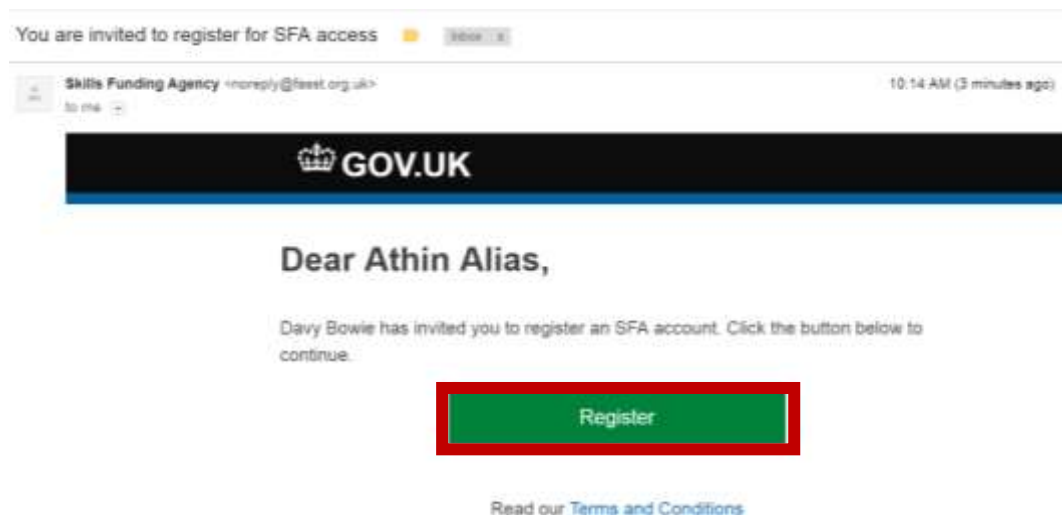
Once you select 'Invite' you will see a success message on the bottom left of the screen



The user will receive an email



The user should access the email, select 'Register', and complete the



Complete the online registration form, and select 'Register'

## Registration

Title  
Mr

First name  
Athin

Last name  
Alias

Email address  
You'll need this email address to sign in to your account  
As you have been invited to register, you cannot change your email address at this point. You will be able to change it once you have registered.

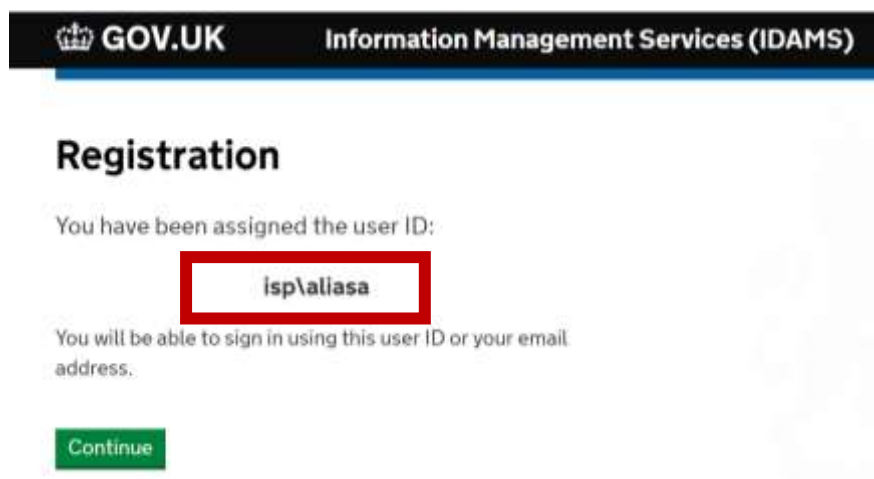
Password  
Enter a password at least 8 characters long, with upper and lower case letters and at least one number  
\*\*\*\*\*  
Password strength: strong

Confirm password  
\*\*\*\*\*

I accept the [Terms and Conditions](#)

Register

The next screen will show the username



On the next screen, the user should select their password reset preference and submit



Once they have selected 'Submit', the account is created and the user will be taken to the IdAMS home screen



If you have any queries, please contact the ESFA Support Team by following the link below [Contact Us](#)

<b>Application / Service</b>	<b>Role Name</b>	
<b>Academy Budget Forecast (Academy Trusts Only)</b>	Academy Budget Forecast Approver	Allows user access to approve the Online Budget Forecast Return Form
	Academy Budget Forecast Preparer	Allows user access to the complete the Online Budget Forecast Return Form
<b>Academy Trust Services (Academy Trusts Only)</b>	Accounts Return Internal Approver	Allows user access to complete and approve the Online Accounts Return Form
	Accounts Return Internal Preparer	Allows user access to the complete the Online Accounts Return Form
	Data Transfer Approver	Allows user to authorise transferring data from their financial management system, via the API, to their Online Accounts Return Form
<b>Apprenticeships Service for Providers</b>	Apprenticeship Account Owner	Can access and make all actions, including editing existing apprentices
	Apprenticeship contributor	Can access all data, advertise apprenticeships, manage funding, add apprentice details, view existing apprentices, and set up employer accounts. Cannot make changes or approve new apprentice requests
	Apprenticeship contributor with approval	Can access all data, advertise apprenticeships, manage funding, add apprentice details, view existing apprentices, and set up employer accounts and approve new apprentice requests
	Apprenticeship Viewer	Can view apprenticeships, funding, apprentice requests and existing apprentices
<b>Childsafeguarding – Notify death or serious harm of a child (Local Authority Use Only)</b>	Child Safeguarding Notifier – For Local Authority Use Only	To enable notification of the death or serious injury to a child
<b>College Financial Data</b>	Financial Plan & Cashflow Preparer	Allows colleges to submit various templates containing financial information, as well as financial statements and management letters
<b>Submit Learner Data (DCFT)</b>	Data Exchange Service – Provider Information Officer	Allows user access to submit data and view reports for ILR, EAS, ESF Supplementary and Funding Claims

	Data Exchange Service – Provider Submissions User	Allows user access to submit data and view reports for ILR, EAS, ESF Supplementary and Funding Claims
	Submit Learner Data – FE Workforce	Allows user to access the FE Workforce data collection
	Submit Learner Data - FE Workforce Governor	Allows user to access the FE Workforce Governor collection
<b>External Power BI</b>	View Your Education Data – AFED	To highlight key information providers are submitting back to the organisation in a clear to understand and engage with style. It will help drive data quality through a greater understanding of the data being submitted by the readers
	View Your Education Data – College Financials	To enable the reader to understand how their college is performing in terms of financial management through sharing the data they submitted to us. It will add value through benchmarking and highlighting concerning areas
	View Your Education Data – COVID 19	To get key information regarding attendance, Early Years placements or vulnerable children to local organisations so that they can make local decisions in a timely manner. Supporting the departments covid-19 response through engagement with Local Authorities and Academy Trusts
	View your Education Data - Data and MI Reports	These are a suite of reports that are shared with Local Authorities that show the number of 16–19-year-olds in education in their area. This supports Local Authorities who are looking to monitor attendance in their areas from having to query each provider individually
	View Your Education Data – Local Authority Analysis	Collates a number of financial and education performance indicators into one dashboard so that LAs will be able to identify any risks with their maintained schools
	View Your Education Data – Localism	This reporting is shared due to a legal requirement. It is public data, which Mayoral Combined Authorities (MCAs) already receive in raw data form, made visual through the use of a dashboard. This enables DfE to offer a better service to support devolution of AEB to those MCAs who do not have the analytical capability of others

	View Your Education Data – Other Government Departments	
	View Your Education Data – Post 16 Monitoring	These reports highlight where a provider has submitted data that has broken a particular funding rule. It adds insight through aggregations and time series, whilst also showing to users the required steps for each funding rule. Users can also download the data so they can upload into their own MI systems. This will result in better quality of data
	View Your Education Data – QAR	Report shows how the provider is doing in comparison to national and type averages, so they can benchmark their performance in a number of different ways. This is one of the key metrics colleges use to assess their own performance
	View Your Education Data – VMFI Academy Trust Full User	This role provides full access to VMFI for those in academies which do not require the Accounts return preparer or accounts return approver role. It includes select your comparators, data modelling, the ICFP tool, and the ability to give access to an SRMA.  Access to the summary of finances and SRMSAT downloads (academies only).
	View Your Education Data – VMFI Local Authority Full User	This role provides full access for local authority users to VMFI which includes select your comparators, data modelling, the ICFP tool, and the ability to give access to an SRMA.
	View Your Education Data – VMFI Maintained Schools Full Access	This role provides full access to maintained school users to VMFI which includes select your comparators, data modelling, the ICFP tool, and the ability to give access to an SRMA.
	View Your Education Data – VMFI Read Only	These reports give financial insights and recommended actions (highlighted areas to save money and pre-approved suppliers etc.) to Academy Trusts so they can manage their finances better. Private Beta only
	View Your Education Data – VMFI Summary of Finances	These reports give financial insights and recommended actions (highlighted areas to save money and pre-approved suppliers etc.) to Academy Trusts so they can manage their finances better.



<b>FAA – Find an Apprentice</b>	Recruit an Apprentice	Allows user to post apprenticeship vacancies and manage candidate applications
<b>Land and Buildings Collection (Academy Trusts Only)</b>	Academy Trust Land and Buildings Approver	Allows user access to approve the Land and Buildings Collection Tool
	Academy Trust Land and Buildings Preparer	Allows user access to complete the Land and Buildings Collection Tool
<b>Manage your education and skills funding (MYESF)</b>	MYESF - Contract Authoriser	Allows user to read, download, enter, save and submit information. It also allows the user to sign documents in the contracts area of the service and receive automated emails
	MYESF - Contract Manager	Allows user to read, download, enter, save and submit information and receive automated email alerts in the contracts area of the service
	MYESF - Contract User	Allows user to read, and download information in the contracts area of the service
	MYESF - Data Returns and Claims Authoriser	Allows user to read, download, enter, save and submit information. It also allows the user to sign document in the data returns and claims area of the service and receive automated emails
	MYESF - Provider Support User	This role is for users that have system administration rights within SFS, who can appoint users and give permissions. More than one person within the organisation can be appointed to this role. These names will be displayed to users of the service
	<b>Payment Viewer</b>	
<b>MAT Development &amp; Improvement Fund (Academy Trusts Only)</b>	MDIF Preparer	Allows user to access and complete the MAT Development & Improvement fund application
<b>Related Party Transactions</b>	Related Party Transactions User	Allows Academy Trusts that plan to enter into such transactions to declare all RPTs and seek authorisation for those transactions