



Department
for Education

Secure access phase 2

Approver role guide

December 2013

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Secure Access background

Secure Access was introduced on 10 December 2012 to provide Local Authorities and Schools with a single, secure point of entry to Departmental IT systems (currently COLLECT, School 2 School (s2s) and Key to Success (KtS)) and to ensure that the data that they hold is much better protected.

An updated version will be launched on 9th December to allow the creation of individual Secure Access accounts within schools and academies who currently have shared accounts (Local Authority users already have individual accounts).

In support of that, the facility to create and administer SA accounts locally will be provided by introducing an 'Approver' role within each organisation (i.e. School, Academy or Local Authority). In schools and Academies there will be one Approver, in local authorities there will be three Approvers.

The Approver will be able to add, edit or remove other user accounts for their organisation and will be responsible for controlling their access to s2s, KtS and COLLECT (where applicable), even if the Approver does not have access to these applications or groups.

COLLECT Access will no longer be managed by the EDD Helpdesk and it will be the responsibility of the Contact Liaison Officer and individual schools to add and remove access to data collections within COLLECT.

Account claiming process

An 'Approver' is defined as either a generic user at a school (i.e. GybvG8U over 318StJohn) or a Local authority Contact Liaison Officers. An 'End User' is defined as any standard user of the system i.e. Other LA user or School Workforce login/s2s login user within a school who do not have the responsibility of approver.

The selected users will have their accounts upgraded on 9th December to the Approver account type.

The following 'Approver account claim process' will apply to Approvers from both organisation types.

1) A flag will be set for all user accounts given 'Approver' role to activate a 'claim' process on subsequent login to SA following the launch on 9th December.

2) User logs in.

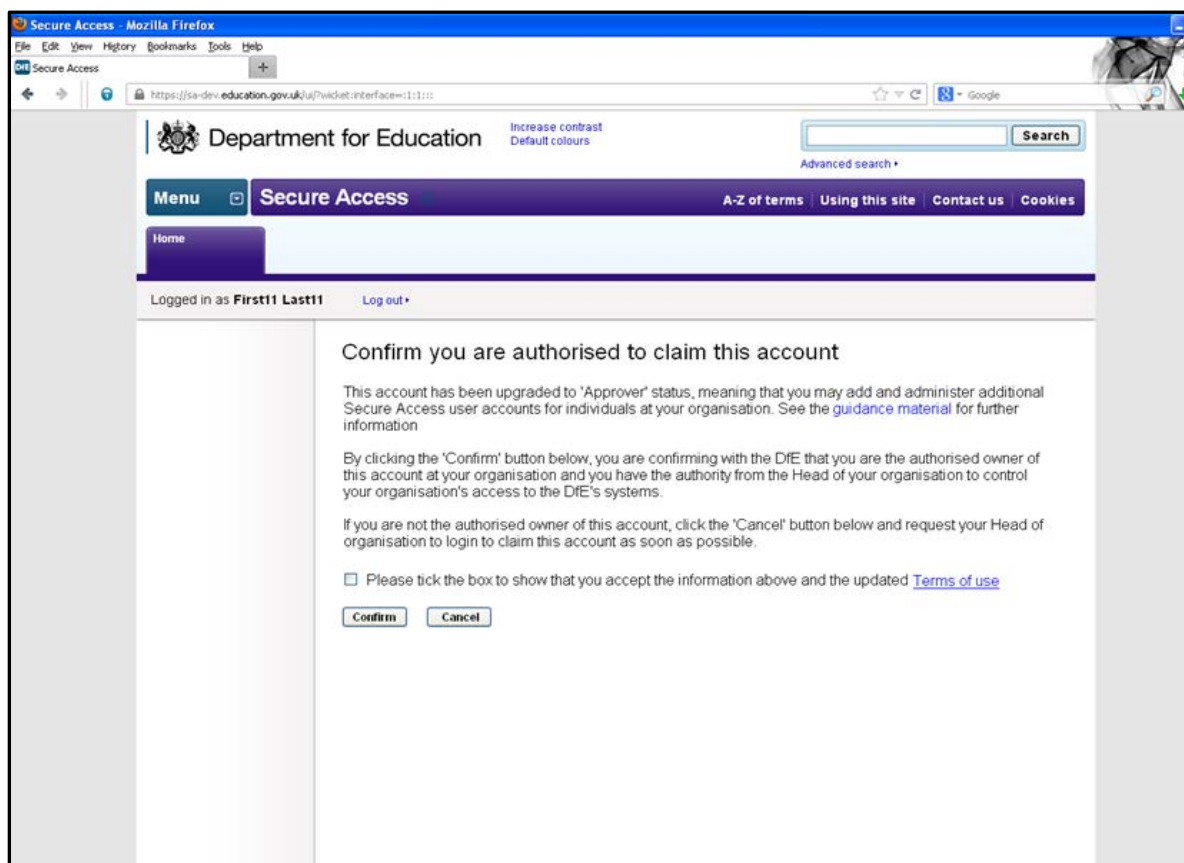
3) User is shown a confirmation screen asking them to confirm they are authorised to claim this Approver account.

3a) **If the user is the authorised individual for this account** they click 'Confirm' and continue to the next page. To click 'Confirm' the user must tick the checkbox – confirmation of this checkbox will be stored as an action on the user's account audit log, along with a timestamp and 'First name' and 'Last name' of the named user on the account.

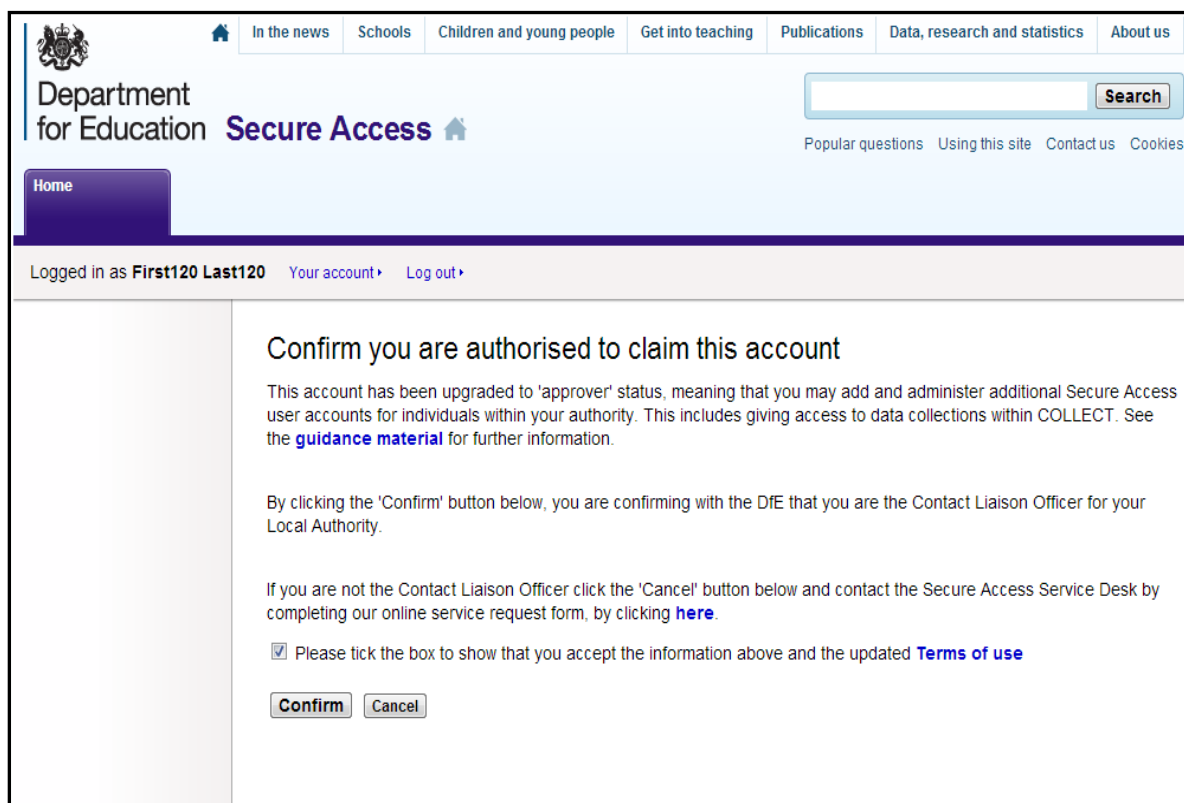
If the user clicks 'Confirm' and does not tick the checkbox, a validation warning is displayed.

3b) **If the user is not the authorised individual for this account**, they click 'Cancel' and are logged out and returned to the Login page.

Confirmation of authorised user - School



Confirmation of authorised user – LA



4) Authorised Approver sees user details confirmation page. Text explains to user that if they are not the user named below that they must update their details.

The Approver will be forced to select a new password and enter a new security question and answer, and will not be allowed to enter one that has been used previously for their account.

Confirm user details

Secure Access - Mozilla Firefox
File Edit View History Bookmarks Tools Help
Secure Access
https://sa-dev.education.gov.uk/u/?wicket:interface=1:2::: Increase contrast Default colours Search
Department for Education
Menu Secure Access A-Z of terms Using this site Contact us Cookies
Home
Logged in as First11 Last11 Log out

Confirm user details

Please ensure your user details are correct. If you are not the name individual below, you must update your name and provide your personal email address, to which only you have access.

Username
TT_test_11

First name
First11

Last name
Last11

Email
First11.Last11@800011.com

Your registered email address will be used for automated email notifications sent from the system, such as when using the 'Forgotten username or password' process

Confirm email
[]

Organisation
Test Organisation 11

Please select a password

- vZpEgCd]6
- yH]p]a2pt
- /kbrs4eXy
- *swynh9gG
- seen8b[qE
- mb?cw9]Qr
- *maeaUuj9

Enter a well formed security question and answer. Good security questions are something to which the answer would not be known by your close friends and colleagues, nor by your immediate family if you work from home. Also refrain from using anything you may use elsewhere on the internet, for example, online banking.

Security question
[]

Please note, the Answer is case-sensitive.

Answer
[]

Pre-populated

NOT pre-populated
Validation in place to ensure a previously used question or answer cannot be entered

5) Approver clicks 'Submit'

6) Approver is taken to 'Add accounts' page to inform them they can add accounts now, or choose to add later.

Approver chooses whether to add accounts now or later

The screenshot displays the Department for Education's 'Add accounts' page. At the top, there is a navigation menu with links for 'In the news', 'Schools', 'Children and young people', 'Get into teaching', 'Publications', 'Data, research and statistics', and 'About us'. Below this is the Department for Education logo and the text 'Department for Education Secure Access'. A search bar is located on the right side. Below the search bar are links for 'Popular questions', 'Using this site', 'Contact us', and 'Cookies'. A navigation menu includes 'Administration', 'Your applications', and 'Help'. A status bar indicates the user is logged in as 'First120 Last120' with links for 'Your account' and 'Log out'. A yellow message box states 'Changes were saved successfully.' The main content area is titled 'Add accounts' and contains the following text: 'Your account has been upgraded to 'Approver' level. You now have the ability to add and administer additional 'End user' accounts. This includes giving access to data collections with COLLECT. You are limited to adding a total of 120 End user level accounts. You may decide to start adding new accounts now, or defer this to later. You may also continue to use a single account, but if you do so only you, the named user should access this account. You'll always have the option of adding new accounts should you decide to at a later date. Select 'Add now' to be taken to the User management page where you can select the 'Add new' button to create a new account. Select 'Add later' if you wish to create accounts at a later date, or retain a single account.' At the bottom of the page, two buttons are visible: 'Add now' and 'Add later', both of which are highlighted with a red rectangular box.

6a) If Approver clicks 'Add now' they're taken to the 'User management' page where they can select 'Add new' to start adding accounts for their organisation.

Approver chooses to add new accounts now

Administration Your applications Help

Logged in as name1 name2 Your account Log out

User management

Users

This page allows you to search for user accounts at your organisation. If you expect to find an account but it does not appear, please contact the Secure Access Service Desk by completing our online service request form, by clicking [here](#). Note that as default only 'Active' accounts are shown. You may need to change the 'Account status' filter to blank in order to see non-active accounts.

User search [Less options](#)

Username First name Last name Email address

Expiry date from Account status Secure Access account type

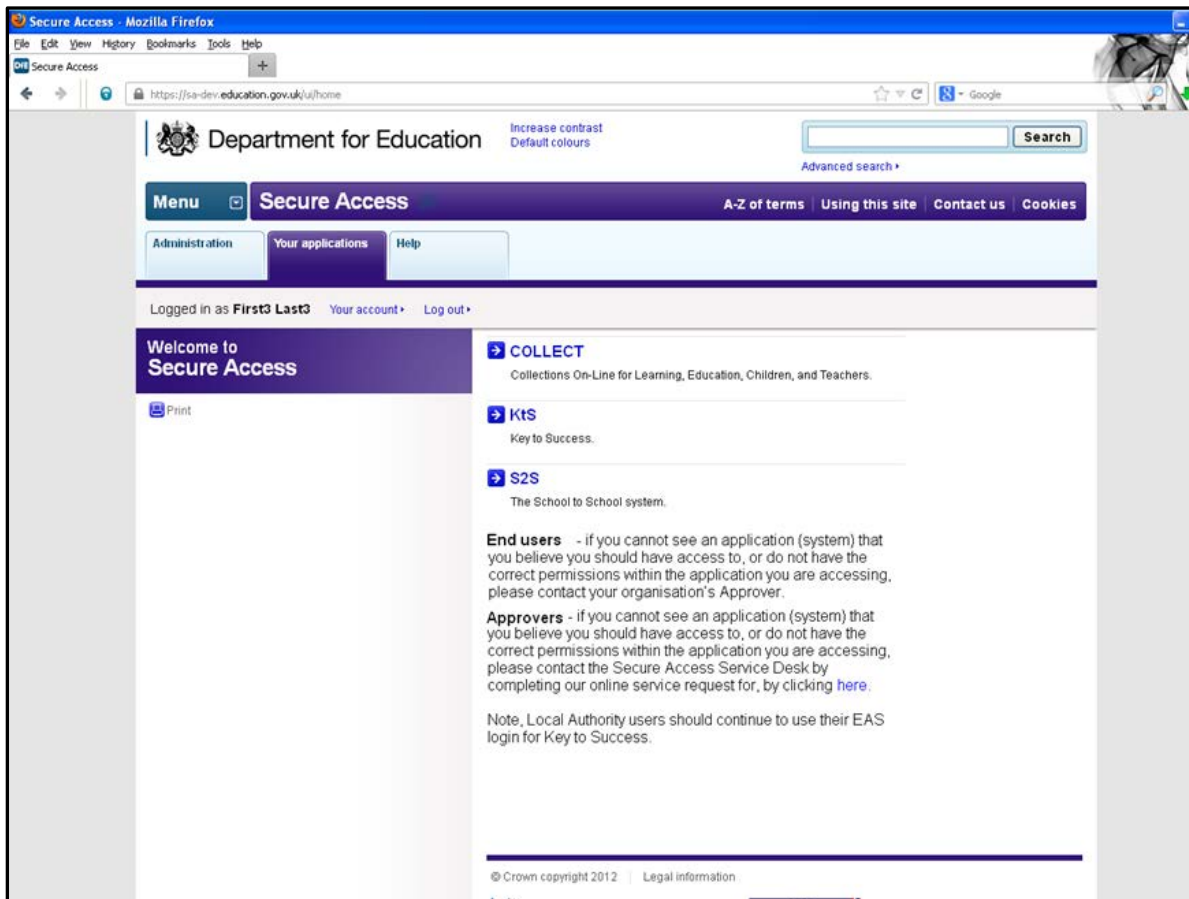
to Groups

Search Reset

+ Add new

6b) If Approver clicks 'Add later' they are taken to the 'Your applications' page and can then access their own connected applications.

Approver chooses to add accounts later



Additional functionality available

Approvers will have a number of additional functionalities available to them. All of which are accessed via the administration tab within Secure Access.

Search for users (and view user account)

Add new user

Edit user account

Archiving a user account

Reset user's password

Re-send account activation link

Approver transfers their access rights

Approver archives their own account

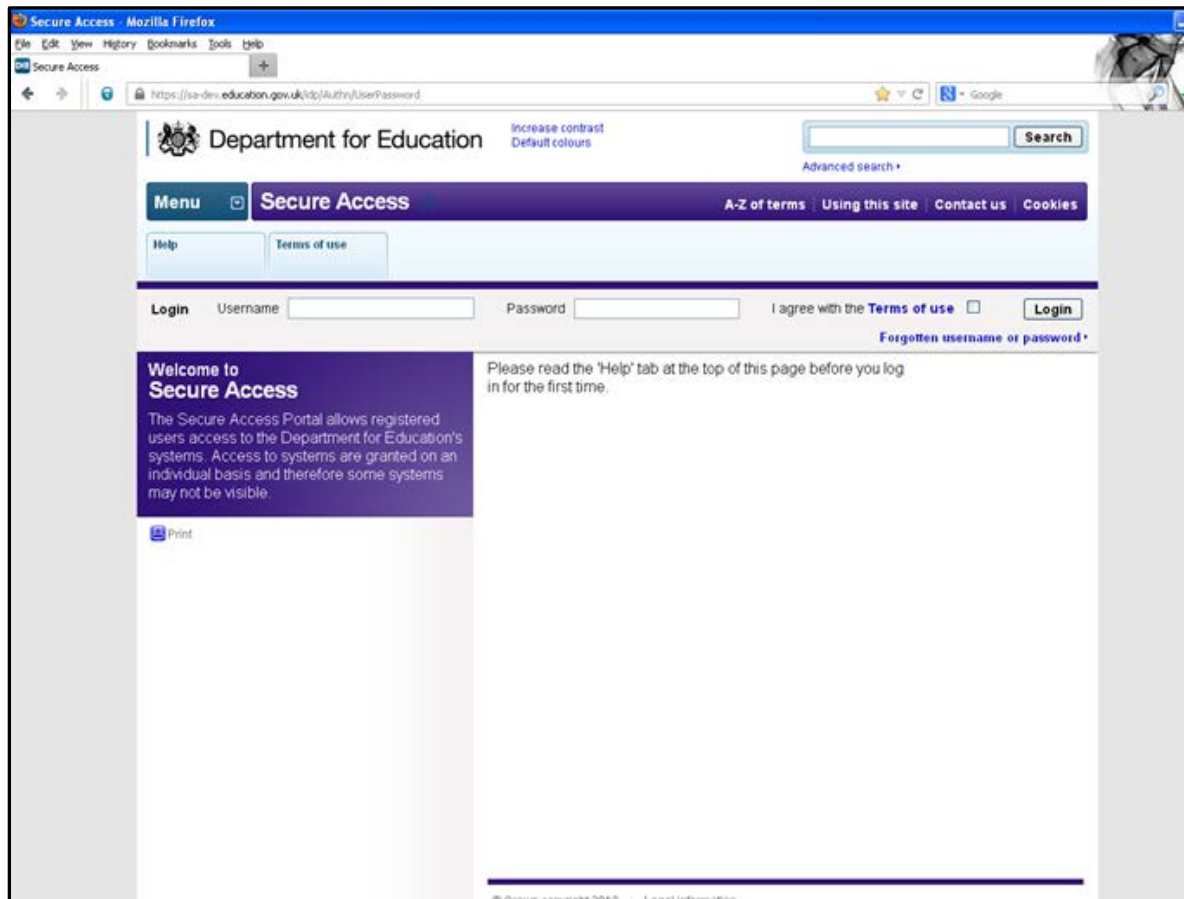
Approver edits their own account permissions

Search for users (and view user account)

Approvers are limited to searching for users at their organisation only.

1) Approver comes to SA login page and logs in

Login page



2) Approver then selects Administration tab

Approver main page

Secure Access - Mozilla Firefox
https://sa-dev.education.gov.uk/#!/home

Department for Education

Menu Secure Access Administration Your applications Help

Logged in as First3 Last3 Your account Log out

Welcome to Secure Access

COLLECT
Collections On-Line for Learning, Education, Children, and Teachers.

Kts
Key to Success.

S2S
The School to School system.

End users - if you cannot see an application (system) that you believe you should have access to, or do not have the correct permissions within the application you are accessing, please contact your organisation's Approver.

Approvers - if you cannot see an application (system) that you believe you should have access to, or do not have the correct permissions within the application you are accessing, please contact the Secure Access Service Desk by completing our online service request for, by clicking [here](#).

Note, Local Authority users should continue to use their EAS login for Key to Success.

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3) Find user account from list of all accounts at the organisation (first 20 accounts displayed by default); OR use search filters to search for an account

Searching for users

Department for Education

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Logged in as Dev Super Your account Log out

User management

Users

User search

Username First name Last name Email address

Expiry date from to

Secure Access group: End User, Approver

Account status: Active

Groups: COLLECT, Kts, S2S

Search Reset

1 to 3 of 1

Username	Name	Organisation	Local authority	Establishment number	Account status	Action
TT_test_347	First347 Last347	Test Organisation	Does not apply		Active	Details
TT_test_317	First317 Last317	Test Organisation	Does not apply		Active	Details
TT_test_397	First397 Last397	Test Organisation	Does not apply		Active	Details

The list of users appears in a new box underneath the User Search box

4) When you have found the User Account you want, select 'Details' to open user's account

Select 'Details'

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Logged in as **Dev Super** [Your account](#) [Log out](#)

User management

Users

User search [Less options ▾](#)

Username First name Last name Email address

Expiry date from to

Secure Access group

Account status

Groups

[Search](#) [Reset](#) [Add new](#)

1 to 3 of 1

Username	Name	Organisation	Local authority	Establishment number	Account status	Action
TT_test_347	First347 Last347	Test Organisation	Does not apply		Active	Details
TT_test_317	First317 Last317	Test Organisation	Does not apply		Active	Details
TT_test_397	First397 Last397	Test Organisation	Does not apply		Active	Details

Select 'Details' to show user's account

5) View user's account

View user's account

The screenshot shows the 'User management' page for a user named 'tt_test_3'. The page is divided into several sections: Personal details, Organisation details, Account details, and Application access/permissions. A callout box points to the 'Application access/permissions' section, specifically to the 'COLLECT' section, with the text: 'Please see table on following page for list of COLLECT Groups.'

Personal details
 Username: **tt_test_3**
 First name: **First3**
 Last name: **Last3**
 Email address: **first3.last3@800003.com**

Organisation details
 Organisation name: **Test Organisation 3**
 Organisation position: **PA**
 Organisation LA code: **202**
 Organisation Establishment number: **1009**

Account details
 Expiry date:
 Account status: **Active**
 Reason for change:
 Secure Access account type:
End user - may only access the applications they're given access to.
Approver - an Approver is a type of End user that may create and administer End user accounts, giving access/permissions to applications they themselves have access to.

End User
 Approver

Application access/permissions
 Select which applications this user should be granted access to. In some applications you can specify certain application specific permissions the user will have access to.

COLLECT
 Access to COLLECT
 Collection group 1
 Collection group 2
 Collection group 3
 Collection group 4
 Collection group 5
 Collection group X

KtS
 Access to KtS

S2S
 Access to S2S

Edit **Back** **Reset password**

Field name	Old value	New value	Change date	Changed by
Last password change date	29/04/2013	29/04/2013	29/04/2013 11:46:44	First3 Last3
Password			29/04/2013 11:46:44	First3 Last3
Last password change date	16/04/2013	29/04/2013	29/04/2013 11:46:27	system system
Password			29/04/2013 11:46:27	system system
Expiry date	14/08/2013		29/04/2013 11:28:28	system system
Password			16/04/2013 19:15:41	First3 Last3
Last password change date	16/04/2013	16/04/2013	16/04/2013 19:15:41	First3 Last3
Expiry date	14/08/2013	14/08/2013	16/04/2013 19:15:41	First3 Last3
Expiry date			16/04/2013 11:26:51	First3 Last3
Last password change date	16/04/2013	16/04/2013	16/04/2013 11:26:51	First3 Last3

The collection groups detailed below will reflect the data collections available on COLLECT for that level of user. All applications and groups will be visible to the Approver who is able to grant access to any application or group even if they do not

have access to it themselves. Where Approver rights are transferred, the new Approver will be able to do the same.

The groups available within COLLECT are as follows:

<u>LA</u>
Alternative Provision
APAD
APEX
CFR
CIN
Early Years
EYFSP
KS1
Phonics
PRM-A
Private Fostering
School Census Spring
School Census Summer
School Census Autumn
SCAP – Forecasts
SCAP – Capacity
S251 Budget
S251 Outturn
SEN2
SWF
School Preference - Primary
School Preference - Secondary
General Hospitals

<u>Schools</u>
CFR
School Census Spring
School Census Summer
School Census Autumn
SLASC
SWF

Add new user

- 1) Login to SA
- 2) Go to 'Administration'
- 3) Select 'Add new'

Select add new

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Search

Advanced search

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Logged in as Dev Super Your account Log out

User management

Users

User search [Less options](#)

Username First name Last name Email address

Expiry date from to

Secure Access group: End User, Approver

Account status: Active

Groups: COLLECT, KtS, S2S

1 to 3 of 1

Username	Name	Organisation	Local authority	Establishment number	Account status	Action
TT_test_347	First347 Last347	Test Organisation	Does not apply		Active	Details
TT_test_317	First317 Last317	Test Organisation	Does not apply		Active	Details
TT_test_397	First397 Last397	Test Organisation	Does not apply		Active	Details

- 4) Enter user's details and select application permissions. Note: Approver can enter an 'Expiry date' should the user only require access for a certain period of time. On that Expiry date the user's account will automatically be archived.

Enter user details

Secure Access - Mozilla Firefox

Department for Education

Secure Access

Administration Your applications Help

Logged in as Dev Super Your account Log out

User management

User

Personal details

Username
tt_test_3

First name
First3

Last name
Last3

Email address
first3.last3@8000003.com

Organisation details

Organisation name
Test Organisation 3

Organisation position

Organisation LA code
202

Organisation Establishment number
1009

Account details

Expiry date

Account status
Active

Secure Access account type

End user - may only access the applications they're given access to.

Approver - an Approver is a type of End user that may create and administer End user accounts, giving access/permissions to applications they themselves have access to.

End User
 Approver

Application access/permissions

Select which applications this user should be granted access to. For some applications you can specify certain application specific permissions the user will have access to.

COLLECT

Access to COLLECT

Collection group 1
 Collection group 2
 Collection group 3
 Collection group 4
 Collection group 5
 Collection group X

KtS

Access to KtS

S2S

Access to S2S

Save Back

Please note: The username is automatically generated.

Your organisations details will automatically be pre-populated.

You should only select 'End User' type, unless you are an existing approver for an LA creating additional approvers.

5) Approver clicks 'Save'

5a) If Organisation has received maximum limit of End user or Approver level accounts, a warning message is displayed and you will need to either remove an existing user and retry or contact the SA Service Desk.

Currently limits are: Approver = School 1, LA 3; End User = School 5, LA 120

6) If validation passes, SA sends an automated email to the entered email address with a link to activate the account (valid for 48hrs).

7) User click's activation link to select password and define security question and answer.

If the user doesn't activate their account within the 48hrs you can access their user record and trigger a new activation email see pg. 23.

Edit user account

- 1) Login to SA
- 2) Go to 'Administration'
- 3) Find user account from list of all accounts at the organisation (first 20 accounts displayed by default); OR use search filters to search for account
- 4) Select 'Details' to open user's account
- 5) View user's account
- 6) Select 'Edit' button
- 7) Modify user's details and select 'Save'

Select 'Edit' button

The screenshot shows the Department for Education Secure Access user management interface. The user is logged in as 'Dev Super'. The page displays the details for a user named 'tt_test_3'. The 'Edit' button at the bottom of the user details is circled in red.

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Logged in as **Dev Super** [Your account](#) [Log out](#)

User management **User**

Personal details
Username
tt_test_3
First name
First3
Last name
Last3
Email address
first3.last3@800003.com

Organisation details
Organisation name
Test Organisation 3
Organisation position
PA
Organisation LA code
202
Organisation Establishment number
1009

Account details
Expiry date
Account status
Active
Reason for change
Secure Access account type
End user - may only access the applications they're given access to.
Approver - an Approver is a type of End user that may create and administer End user accounts, giving access/permissions to applications they themselves have access to.
 End User
 Approver

Application access/permissions
Select which applications this user should be granted access to. For some applications you can specify certain application specific permissions the user will have access to.

COLLECT
 Access to COLLECT
 Collection group 1
 Collection group 2
 Collection group 3
 Collection group 4
 Collection group 5
 Collection group X

KtS
 Access to KtS

S2S
 Access to S2S

Save user's details

The screenshot shows the 'User' management page in the Secure Access system. The user being edited is 'tt_test_3'. The page is divided into several sections: Personal details, Organisation details, Account details, and Application access/permissions. The 'Save' button is circled in red.

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Logged in as **Dev Super** [Your account](#) [Log out](#)

User management **User**

Personal details

Username
tt_test_3

First name

Last name

Email address

Organisation details

Organisation name
Test Organisation 3

Organisation position

Organisation LA code
202

Organisation Establishment number
1009

Account details

Expiry date

Account status

Secure Access account type
End user - may only access the applications they're given access to.
Approver - an Approver is a type of End user that may create and administer End user accounts, giving access/permissions to applications they themselves have access to.

End User
 Approver

Application access/permissions

Select which applications this user should be granted access to. For some applications you can specify certain application specific permissions the user will have access to.

COLLECT

Access to COLLECT

Collection group 1

Collection group 2

Collection group 3

Collection group 4

Collection group 5

Collection group X

KtS

Access to KtS

S2S

Access to S2S

8) If a user's details are updated in Secure Access, they are automatically updated in any connected application (COLLECT/S2S)

Archiving a user account

An End user leaves an organisation (or no longer requires access to SA) and Approver archives the End user's account. Note, an Approver can also 'lock' a user's account, only archive.

- 1) Login to SA
- 2) Go to 'Administration'
- 3) Find user account from list of all accounts at the organisation (first 20 accounts displayed by default); OR use search filters to search for account
- 4) Select 'Details' to open user's account
- 5) Select 'Edit' button
- 6) Change Account status to 'Archived' and enter a reason for change
- 7) Select 'Save'.

Locking a user account

An Approver can temporarily lock an End user account

- 1) Login to SA
- 2) Go to 'Administration'
- 3) Find user account from list of all accounts at the organisation (first 20 accounts displayed by default); OR use search filters to search for account
- 4) Select 'Details' to open user's account
- 5) Select 'Edit' button
- 6) Change Account status to 'Locked' and enter "Password expired" as the reason for change
- 7) Select 'Save'.

Archive account

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User management

User

Personal details

Username

First name

Last name

Email address

Organisation details

Organisation name
Test Organisation 3

Organisation position

Organisation LA code
202

Organisation Establishment number
1009

Account details

Expiry date

Account status

Reason for change

Secure Access account type

End user - may only access the applications they're given access to.

Approver - an Approver is a type of End user that may create and administer End user accounts, giving access/permissions to applications they themselves have access to.

End User
 Approver

Application access/permissions

Select which applications this user should be granted access to. For some applications you can specify certain application specific permissions the user will have access to.

COLLECT

Access to COLLECT

- Collection group 1
- Collection group 2
- Collection group 3
- Collection group 4
- Collection group 5
- Collection group X

KtS

Access to KtS

S2S

Access to S2S

Reset user's password

This functionality is used if an end user has forgotten their password and can't remember security question or can't complete automated forgot password process for any reason. The user would ask their organisation's Approver to reset their password. Note: the same process applies if the End user doesn't click their reset password link before the link expires in 48hrs. See Page 23.

- 1) Login to SA
- 2) Go to 'Administration'
- 3) Find user account from list of all accounts at the organisation (first 20 accounts displayed by default); OR use search filters to search for account
- 4) Select 'Details' to open user's account

Reset password

The screenshot shows the 'User' management page for a user named 'tt_test_3'. The page is divided into several sections: Personal details, Organisation details, Account details, and Application access/permissions. The 'Reset password' button is highlighted with a red circle.

Personal details
Username: tt_test_3
First name: First3
Last name: Last3
Email address: first3.last3@800003.com

Organisation details
Organisation name: Test Organisation 3
Organisation position: PA
Organisation LA code: 202
Organisation Establishment number: 1009

Account details
Expiry date:
Account status: Active
Reason for change:
Secure Access account type: End user

Application access/permissions
Select which applications this user should be granted access to. For some applications you can specify certain application specific permissions the user will have access to.

COLLECT
 Access to COLLECT
 Collection group 1
 Collection group 2
 Collection group 3
 Collection group 4
 Collection group 5
 Collection group X

KIS
 Access to KIS

S2S
 Access to S2S

Buttons: Edit, Back, **Reset password**

Change Log Table:

Field name	Old value	New value	Change date	Changed by
Last password change date	29/04/2013	29/04/2013	29/04/2013 11:46:44	First3 Last3
Password			29/04/2013 11:46:44	First3 Last3
Last password change date	16/04/2013	29/04/2013	29/04/2013 11:46:27	system system
Password			29/04/2013 11:46:27	system system
Expiry date	14/08/2013		29/04/2013 11:28:28	system system
Password			16/04/2013 19:15:41	First3 Last3
Last password change date	16/04/2013	16/04/2013	16/04/2013 19:15:41	First3 Last3
Expiry date	14/08/2013	14/08/2013	16/04/2013 19:15:41	First3 Last3
Password			16/04/2013 11:26:51	First3 Last3
Last password change date	16/04/2013	16/04/2013	16/04/2013 11:26:51	First3 Last3

5) Click 'Reset password' button

6) SA automatically sends an email to the user's email address with password reset link (valid for 48hrs only see page 23)

7) User clicks on password reset link, selects new password and defines new security question/answer.

Re-send account activation link

If a user doesn't click their account activation link in their activation email within 48 hours, the link will expire for security reasons. An Approver can click a button on the user's form to re-send them their activation email with a new activation link.

- 1) Approver finds the users account
- 2) Approver opens the user's account.
- 3) Approver clicks the 're-send activation link' button.
- 4) An email is sent to the user's email address with a new activation link – see email text in Section 8.1
- 5) User clicks the account activation link and starts the account activation process.

Approver transfers their access rights

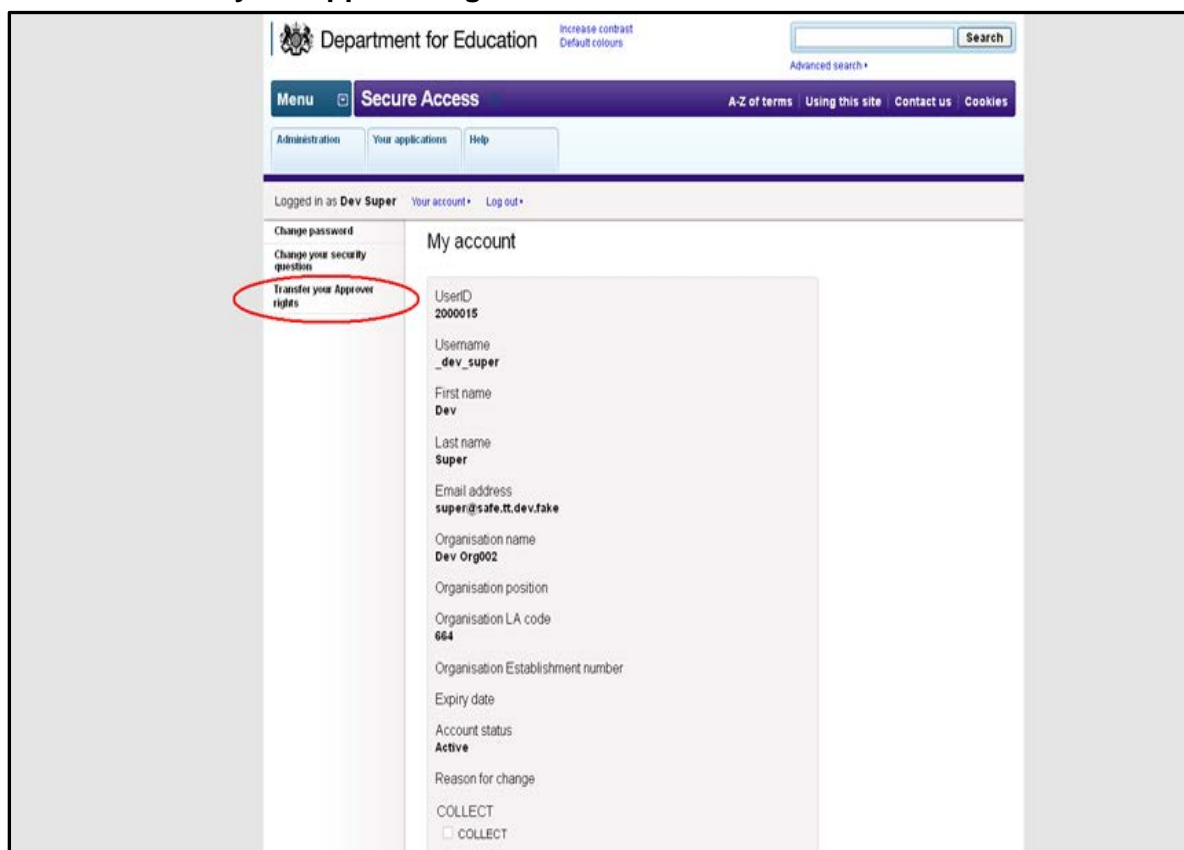
Approvers will have access to transfer their Approver rights to an existing user account within their organisation. This will ensure that an organisation will not lose Approver rights when, for example the Approver leaves the organisation.

When an Approver transfers their rights to another user, that user will be granted Approver level access and access to all application groups that the Approver had access to.

The process for this is as follows:

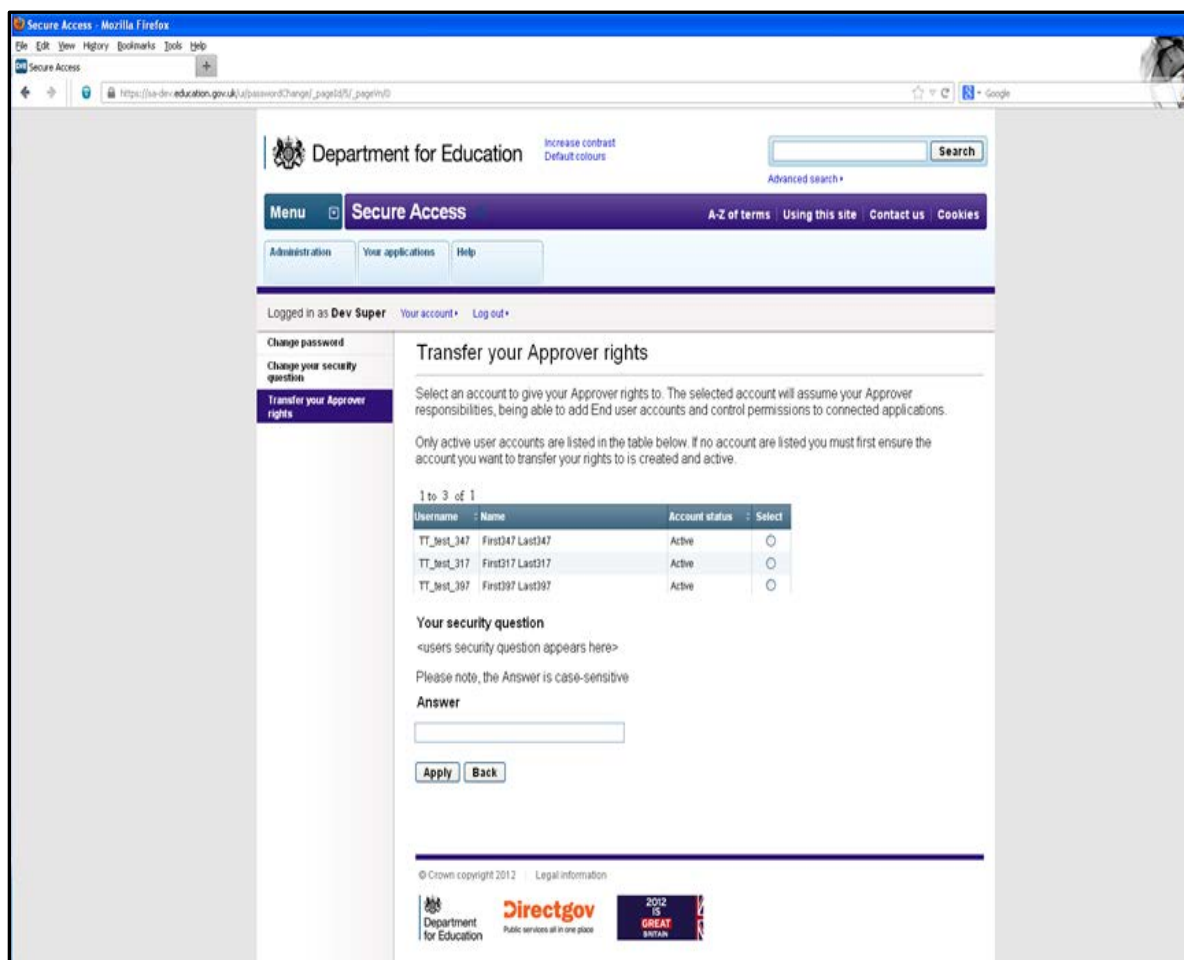
- 1) Approver goes to 'Your account' section.
- 2) Approver selects 'Transfer your Approver rights' menu item

Select 'Transfer your Approver rights'



- 3) Approver selects the End user they want to transfer their rights to from a list of users at their organisation (limited to Account status = Active). Approver must correctly answer their security question to continue.

Select account



4) Approver clicks 'Apply'. At this point:

- The current Approver becomes an 'End user' level account.
- The selected End user account now has Approver level access.
- The selected user account automatically has access to all groups to which the previous Approver had access to. The Approver will retain access to all groups they formerly had access to, but can no longer grant others with access to those groups.

SA currently allows only one Approver per school or Academy and up to three Approvers per LA.

Approver archives their own account

Approvers cannot archive their own account. They must follow the process in Section 3.9 to transfer their Approver rights to another account, at which point the new Approver may archive their account (the old Approver will have become an End user account).

Approver edits their own account permissions

Approver can edit their access to applications and application groups (e.g. COLLECT, S2S, KtS, COLLECT collection groups).

COLLECT ACCESS

COLLECT Access will now be managed via the user edit screen for the following COLLECT Groups:

<u>LA</u>
Alternative Provision
APAD
APEX
CFR
CIN
Early Years
EYFSP
KS1
Phonics
PRM-A
Private Fostering
School Census Spring
School Census Summer
School Census Autumn
SCAP – Forecasts
SCAP – Capacity
S251 Budget
S251 Outturn
SEN2
SWF
School Preference - Primary
School Preference - Secondary
General Hospitals

<u>Schools</u>
CFR
School Census Spring
School Census Summer
School Census Autumn
SLASC
SWF

All current school and LA users will have their access migrated, so if they have access to specific data collections now this will still be in place on 9th December. Any changes after this date will need to be actioned by the organisations Approver.

Local Authority CLO's and school 'Approvers' will grant access for their staff members by:

- 1) Searching for them within SA or adding a new user where they do not have an account
- 2) Editing their record to add or remove access to data collections using the selection boxes.
- 3) Saving the record to enable updates to take place.

Please Note: CLO's must inform their staff members they still need to advise the EDD Helpdesk of their contact details for use in bulletins and updates regarding the data collections. More information on this will be published in bulletins and user guides for SA.

Help

Please contact the SA Service Desk (SA.SERVICEDESK@education.gsi.gov.uk) for any queries regarding Secure Access

Please contact the EDD Helpdesk (EDD.HELPDESK@education.gsi.gov.uk) for any queries regarding the CLO/COLLECT procedure.



Department
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