

## **Hub Training Materials**

**LEA User Permissions Tool**

**2016-11-09**

# LEA User Permissions Tool

## About this Training

In order to maintain the security of the DC Public Charter School Board's ("DC PCSB") Hub, each LEA designates one user to serve as its LEA Administrator. This individual is responsible for managing which individual(s) at the LEA are allowed access to their LEA's data.

In order to ensure LEA's data are appropriately disclosed to only the correct users at each LEA, access to DC PCSB's data management system ("the Hub") is managed by a single user from the LEA. This document outlines the requirements and responsibilities of the LEA Administrator, and serves as a guide to the access permissions available in the Hub.

The purpose of this training is to show users, and specifically LEA Administrators, how to access and manage the LEA User Permissions Tool within DC PCSB's Hub.

## Objectives

After completing this training, you will be able to:

- Understand the role of the LEA Administrator
- Access the LEA User Permissions Tool
- See a list of users assigned to the LEA
- Request new users get access to the Hub
- Request users be removed from the Hub
- Manage access to permissioned data

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## Background

Each LEA is responsible for assigning a single point of contact, known as the LEA Administrator, who manages access to the Hub for the LEA. All other users at the LEA are able to see who the LEA Administrator is, and their own access permissions from the tool. **Users who are not assigned as the LEA Administrator are not able to see other users at the LEA, nor can they change their permissions. Users must contact their LEA Administrator if they believe their permissions are incorrectly set.**

This guide is focused on the actions available for the LEA Administrator. If your LEA has not designated their LEA Administrator, please complete this step first. More information about designating an LEA Administrator can be found below.

## Designating an LEA Administrator

Each LEA will designate a single system user to serve as its LEA Administrator. The first LEA Administrator for an LEA is designated by the LEA's Executive Director, or equivalent head of school. LEAs will receive an email with instructions on how to designate their LEA Administrator.

Subsequent changes to the LEA Administrator role may be requested by either the LEA's Administrator or Executive Director either in the Hub (preferred) or via email.

### Role of the LEA Administrator

The LEA Administrator serves as the LEA's primary point of contact for access and permissions associated with the Hub. Most importantly, the LEA Administrator is the only individual authorized to complete the following actions:

- Request new user credentials
- Request a user's access credentials be revoked
- Modify users' permissions for restricted data in the Hub

**Only the LEA Administrator may request the creation or revocation of access credentials for the Hub.**

### Criteria to be an LEA Administrator

The LEA Administrator must be a full-time employee of the LEA or its management organization. Individuals working under contract with the LEA are ineligible to be the LEA Administrator. The individual serving as the LEA Administrator must have access to all LEA data available in the Hub.

In order to protect access to sensitive information, if the LEA informs DC PCSB that the LEA Administrator no longer works for the LEA, DC PCSB will proactively

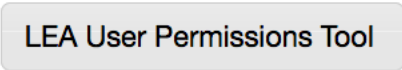
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revoke the LEA Administrator's access credential, and the role of LEA Administrator will default to DC PCSB's Data Management Specialist until the Executive Director designates a new LEA Administrator. Other users' existing access permissions will be maintained until the LEA's Executive Director designates a new LEA Administrator.

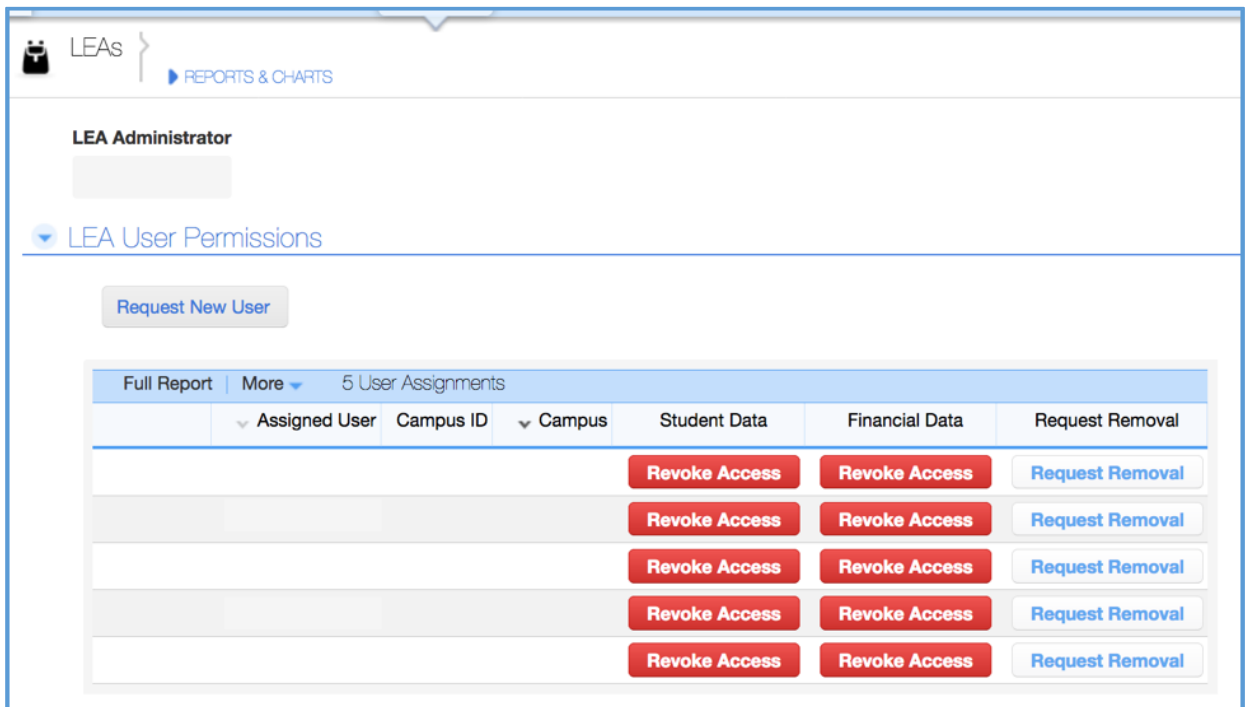
*DC PCSB highly recommends that the LEA add the transfer of LEA Administrator role to its transition planning for the individual who holds the role.*

## Managing User Permissions

To support LEAs in their efforts to securely manage access to the Hub, DC PCSB developed the LEA User Permissions Tool. The LEA User Permission Tool is linked to from the LEA form. To access the tool, click on the **LEA User Permission Tool** button under the Contacts heading on the LEA form:



After clicking, you will see a form similar to the below:



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This form has 5 key functions:

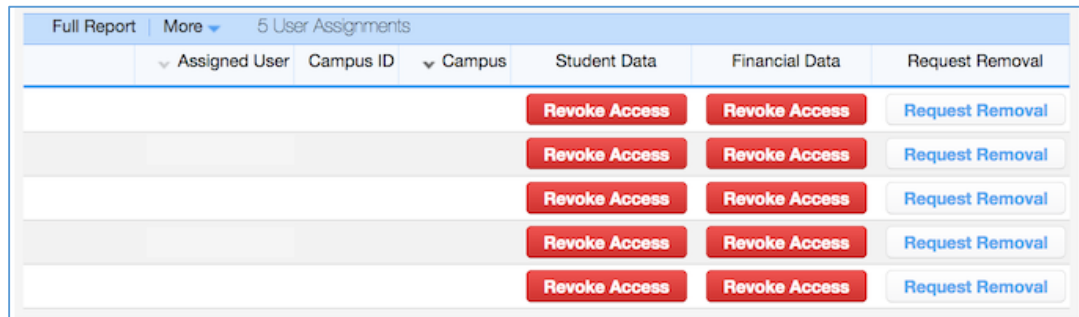
- **LEA Administrator** – this field displays who the LEA Administrator is for the LEA. All Hub users at the LEA are able to see this field, allowing them to know who to contact about their permissions.
- **Request New User** – LEA Administrators can request new users using the **Request New User** button at the top of the form:



Clicking this button takes the LEA Administrator to a partially pre-filled data ticket. The LEA Administrator needs to provide the name and email address of each new user for whom they are requesting an access credential. To expedite the process of creating and revoking user credentials, DC PCSB requests that LEA Administrators use this process to make requests.

*Please note that DC PCSB staff are not allowed to request the creation or revocation of access credentials on behalf of your LEA. To ensure that only the correct staff have access to data provided by DC PCSB, only the LEA Administrator can complete these actions.*

- **View User Assignments List** – LEA Administrators can view the list of users who are assigned to the LEA in the table:

A screenshot of a web application table titled "5 User Assignments". The table has a header row with columns: "Assigned User", "Campus ID", "Campus", "Student Data", "Financial Data", and "Request Removal". Below the header, there are five rows of data. Each row contains three buttons: a red "Revoke Access" button, another red "Revoke Access" button, and a light blue "Request Removal" button. The "Assigned User" and "Campus ID" columns are empty in the visible rows. The "Campus" column contains a dropdown arrow in the first row, but no text is visible. The "Student Data" and "Financial Data" columns are empty in the visible rows.

Assigned User	Campus ID	Campus	Student Data	Financial Data	Request Removal
			Revoke Access	Revoke Access	Request Removal
			Revoke Access	Revoke Access	Request Removal
			Revoke Access	Revoke Access	Request Removal
			Revoke Access	Revoke Access	Request Removal
			Revoke Access	Revoke Access	Request Removal



This list includes all users who are assigned to the LEA, including users who are assigned to the campus role. Users assigned to only specific campuses have a campus populated in the Campus field.

DC PCSB users are not included in the list of users with access to the LEA. Only users requested and assigned by the LEA are included in this list. DC PCSB also reserves the right to assign its own users specifically to an LEA for the purposes of testing and troubleshooting.



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- **Grant Access/Revoke Access (Can Access/Cannot Access)** – LEA Administrators can manage their LEA users' permissions to view and edit specific data permissions using the Grant/Revoke Access button in each column. It is the LEA Administrator's responsibility to ensure the appropriate access settings are maintained for all users assigned to their LEA.

The button cycles color and displayed text depending on the user's permission status:

-  The user does **not** have access to the data type; clicking the button grants access.
-  The user has access to the data type; clicking the button revokes access.

Users who are not the LEA Administrator can view their own permissions. For non-LEA Administrators, the button coloring and wording are different:

-  The user has access to the data type.
-  The user does **not** have access to the data type.

Clicking the buttons in the non-LEA Administrator role does nothing.

- **Request Removal** – Each user assignment has a **Request Removal** button:



Similar to the "Request New User" button, this button directs the LEA Administrator to a pre-filled data ticket to request that a user be completely removed from the Hub. The LEA Administrator should review the ticket for accuracy, and click submit to make the request that DC PCSB revoke the user's access to the LEA's data.

## LEA and Campus User Roles

The Hub supports both an LEA and Campus user role. LEA users have access to all campuses at an LEA. Campus users only have access to data at the specific campus to which they are assigned. Users who need access to data for more than one campus must be assigned to the LEA user role.

A user may be assigned to multiple LEAs. Access and permissions are managed for each LEA discretely.

### Example scenarios

If an LEA user can access student level data for Campus A at LEA A, they will have access to student level data at all campuses within LEA A. User permissions for LEA B are not affected by the user's permissions at LEA A.

If a Campus user can access student level data for Campus A at LEA A, they will not have access to any information except summary directory information about Campus B within LEA A.

## Data Permissions

*Please note that some functionalities in the Hub are dependent on users' ability to access and view information. Restricting an LEA user's access to data may limit or degrade a user's ability to view or update data.*

Certain areas of DC PCSB's Hub are permissioned to allow users to perform specific functions within the Hub without having access to all information. This section describes the different areas which are permissioned separately from general access. If a table is not described below, it is available to all users who have access to the Hub.

While permissioning allows LEAs to restrict which individuals at their LEA are allowed to access specific types of information, **it is important for LEAs to carefully consider who has access to the Hub, as much of the information collected and stored by DC PCSB in the Hub should be considered sensitive.**

### Student data

All tables which include the USI field are considered student level data, and are included in this permission.

Tables which include aggregations of student level data, but do not themselves have student level data, are not restricted by this permission. However, dynamic calculations may be impacted by a user's permissions.



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## Financial data

Four tables are included in this permission:

- Financial Data
  - Management Services
- LEA Enrollment Projections
- Campus Enrollment Projections

## Relationship diagram of permissioned tables

The diagram below summarizes the relationship of data tables within the Hub and how the permissions are inherited. Tables colored grey are tables which govern user permissions; tables colored yellow contain student level data; and tables colored green contain financial data.

