LFY Permissions App Quick Reference Guide

1. Introduction

The LFY Permissions Application allows those with the role of 'Department Manager' in LFY to register staff as Department Tutors and grant and control access rights for PS staff to functions within LFY.

2. Benefits of the LFY Permissions App

The LFY Permissions app provides:
- Self-service system for those with the role of Department Managers in LFY to allocate permissions to PSS.
- Rapid and custom response to adding Department Tutors.
- Highly efficient permission management for LFY applications.

3. Using the LFY Permissions App

The LFY Permissions App has 2 areas:

1) Department Tutor Allocation: Allocation of Department Tutors within academic departments.

2) PSS Permissions: adding and editing of access permissions to Professional Services Staff (PSS) for LFY functions.

The screenshot below shows where to find the Permissions App once you have logged in to LFY.
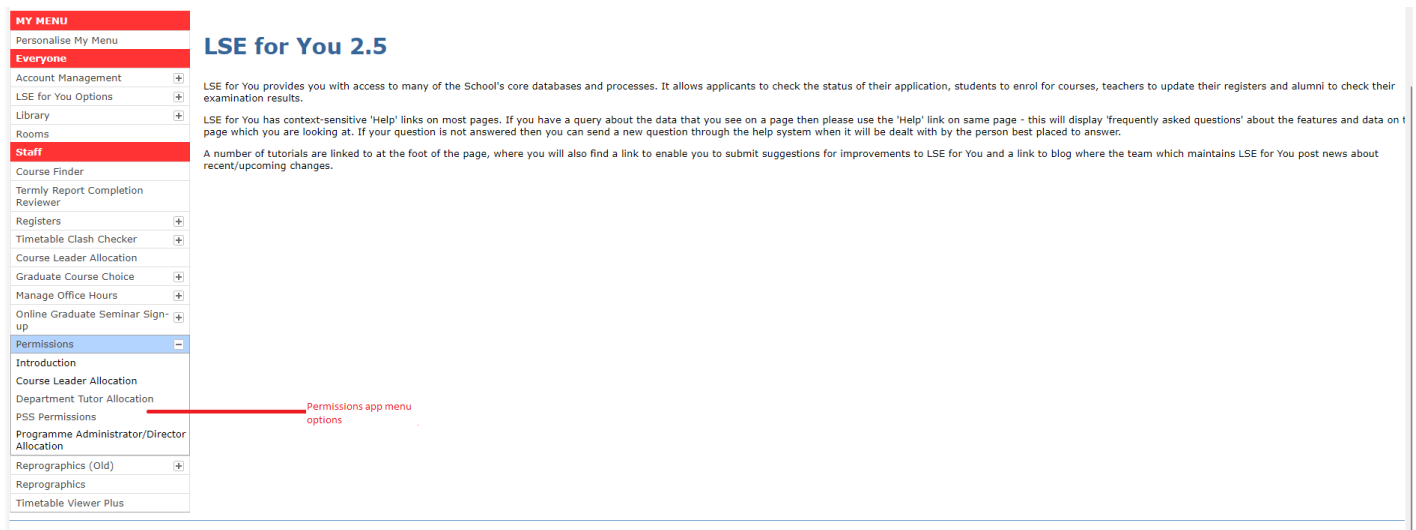
When the Permissions heading is expanded, the following new options appear:
- **Introduction:** gives an introduction to the Permissions App.
- **Department Tutor Allocation:** gives access to the Department Tutor Permissions App.
- **PSS Permissions:** gives the available options to grant PSS permissions.

Other options are presented when the heading is expanded, the above are new options.

3.1 Setting Department Tutor Allocation:

1) Expand the 'Department Tutors Allocation' option from the 'Permissions' heading.

2) Click the **'Set Department Tutor'** button to search for a member of LSE academic staff and set them up as a Department Tutor.

3) Enter a valid LSE e-mail address in the **'Person'** text box

4) Select the **'Find person'** button to find and return details for that person. You will see details of their 'Surname', 'Known As', 'Email', 'PlayRef', and 'Department'
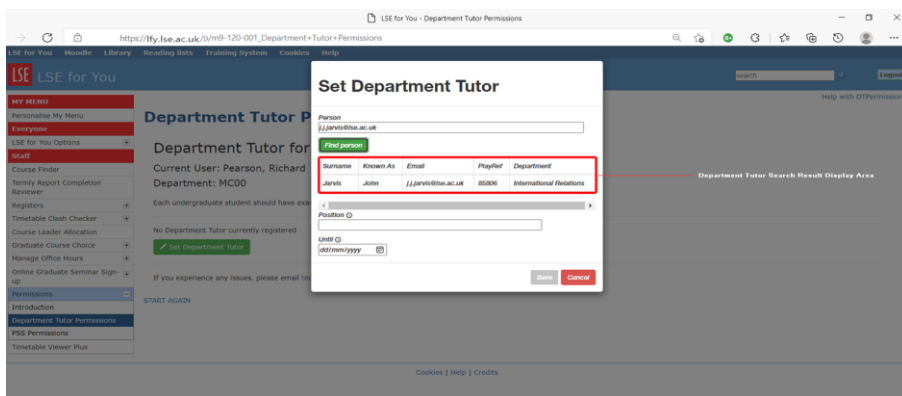
5) Enter the position of the person being added as a DT in the **'Position'** textbox. This should be Department Tutor.
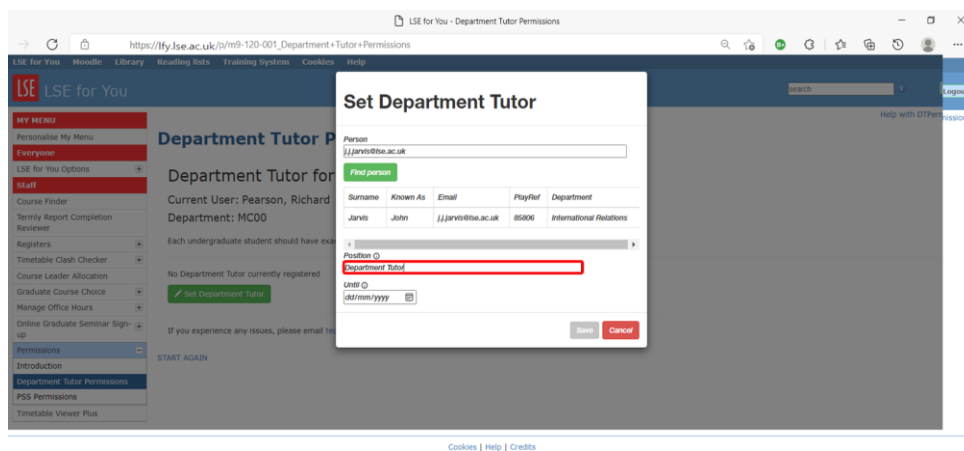
6) Enter the expiry date for the permission in the '**Until**' box in the format 'dd-mm-yyyy' or by using the date picker. At the current time, this must be for 2 years or less. We are exploring whether this requirement can be removed.

7) **Select** the **'Save'** button to save your entry or **'Cancel'** to exit the process. Upon successfully saving, a confirmation message will display.

Department Tutor Allocation to Note:

➢ The @lse.ac.uk section of the e-mail address will auto-populate in the **'Person'** text box when you enter an e-mail address

➢ **'Change Department Tutor'** replaces **'Set Department Tutor'** once a DT has been set.

➢ If a pop-up informs you that the person cannot be found, check the LSE e-mail address you have entered, it is likely to be incorrect.

➢ The **edit icon** is visible next to the DT's name once a DT has been set and allows the position and expiry date to be edited for that DT's permissions.

➢ The **'START AGAIN'** button refreshes the page.

➢ All departments will see the DT Allocation function, even if they don't have UG students, and this can be ignored if not relevant. The DT Allocation function is never withdrawn from a department.

3.2. Setting Professional Services Staff (PSS) Permissions

1) To access the PSS Permissions App, expand the 'Permissions' sub-menu and click the *'PSS Permissions"* option to take you to the **PSS Permissions page**.

2) You will see the PSS Permissions Grid which shows the name of all PSS who are on the HR payroll system in your department; LFY functions you can grant permissions for; and current associated PSS permissions as shown below:

## To grant or change access Permissions to Staff shown in the list

1) Click the blue *'Enter Edit Mode'* button. '**Save Changes**' and '**Exit Edit Mode**' will replace the '**Enter Edit Mode**' button at the bottom of the PSS Permissions Grid. This indicates you are successfully in edit mode as show below.

2) Locate the person you wish to grant access to the required LFY functions on the Grid and tick the checkbox that corresponds to the functions you would like them to access. You can hover over any of the permission checkboxes to get a pop-up of the definition of the role in that column.
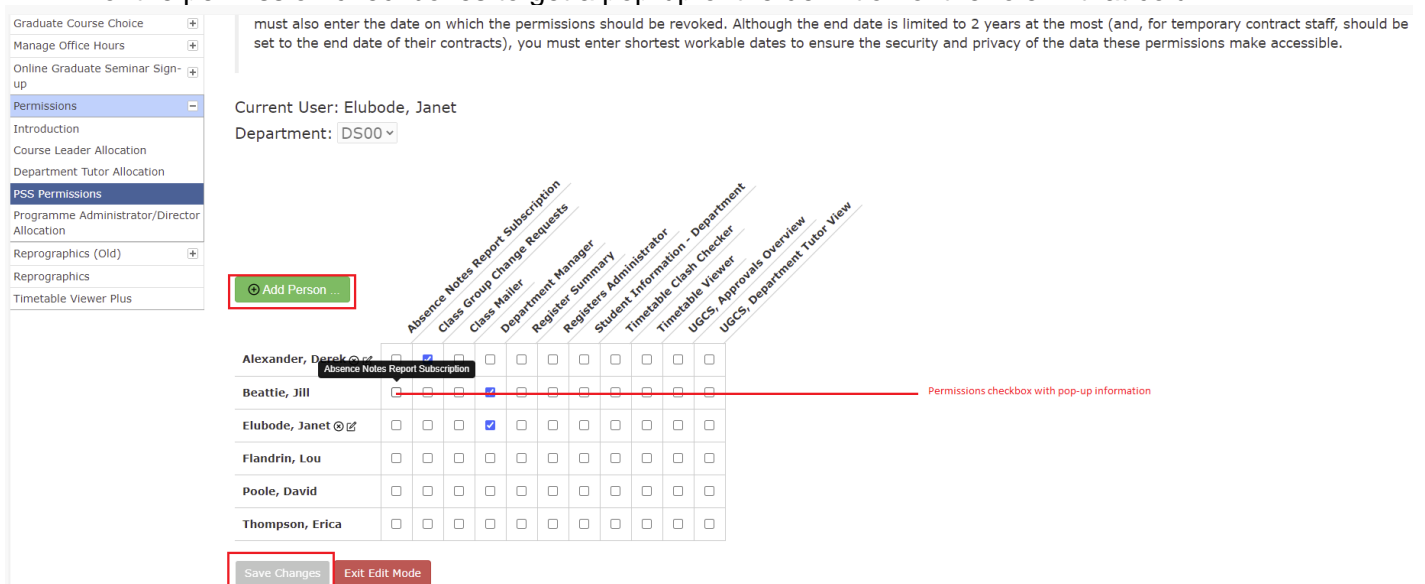
3) **Select** the **'Save'** button to save changes. You can exit edit mode by selecting the **'Exit Edit Mode'** button.

4) To remove permissions, **uncheck** the box in the PSS Permissions Grid for the relevant function you wish to remove permission for, for the relevant staff member. **Select** the **'Save'** button to save changes and exit edit mode by selecting the **'Exit Edit Mode'** button.

To manually add a person who is not listed as a member of professional services staff in your department as a guest. This this can be a member of staff in another department, academic staff or non-payroll staff in your own department:

1) Click the blue *'Enter Edit Mode'* button at the bottom of the PSS Permissions Grid. You will not be able to make changes without clicking the **'Enter Edit Mode'** button

2) Select the *'Add Person'* button.

3) Enter a valid LSE e-mail address for the person you wish to add to the grid into the *'Person'* text box.

4) Select the *'Find person'* button, to find and return details for that person. You will see their details:
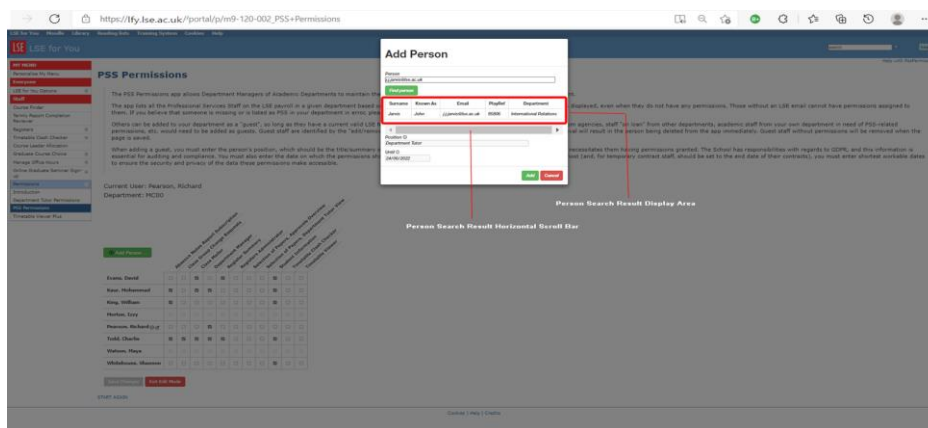
If the user is not found "user not found" will be displayed. Check the LSE e-mail address you have entered, it is likely to be incorrect.

5) Enter the position for the found user you wish to add to the PSS Permissions Grid in the *'Position'* text box as shown below.
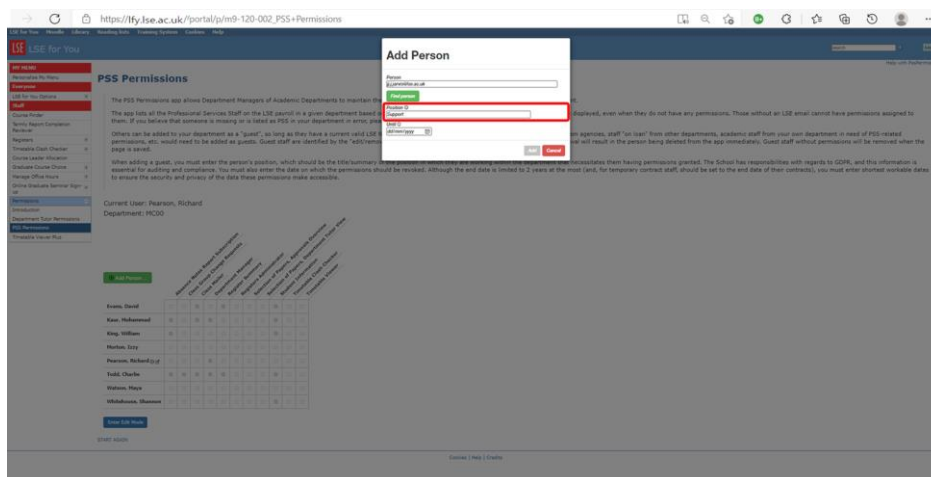
6) **Enter** an *'Until'* date in the format *'dd-mm-yyyy'* or by using the date picker. At the current time, this must be for 2 years or less. We are exploring whether this requirement can be removed.

7) Select the **'Add'** button on the bottom to save and add the found person to the PSS Permissions Grid. Or **Select** the **'Cancel'** button to cancel. You will see a confirmation message that the person has successfully be added to the PSS Permissions Grid as a guest, ready for you to assign the relevant permissions to them.
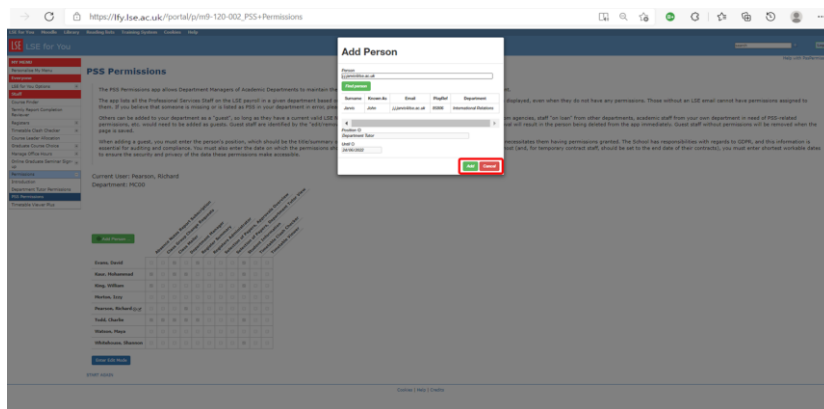
PSS Permissions to Note:

- Details for staff on the Permissions Grid with an **'edit'** and **'x'** icons next to their names can be edited or removed. Once in **'Enter Edit Mode'** use the **'edit'** and **'x'** icons to edit or remove the details for these staff members. These changes can be saved using the green Save Changes button.

- The **'Start Again'** button refreshes the page **and** resets the Permissions Grid to the last saved state**.**

- If you choose the '**Exit Edit Mode**' button with changes pending, you will be asked to '**Save Changes**', '**Discard Changes**' or '**Cancel**' and return to the grid.

- All permissions granted to PSS within LFY will have been automatically migrated over to the Permissions App. To make changes to these, you will need to follow the steps above.

- It is recommended to have more than one member of staff for each department with the 'Department Manager' role in LFY for business continuity reasons.

- Any member of staff added as a guest within your department needs to have permissions assigned to remain assigned as a guest for your department. Any guest added to your department who does not have any permissions assigned will be removed when the user clicks the save button to store changes. LSE payroll PSS will remain listed even if they do not have any permissions assigned.

- Once the assigned duration (maximum 2 years) has been exceeded for permissions granted either to DTs or guest PSS within the Permissions App, the holder of the permissions and not the DM role-holder(s) within the department will be notified by e-mail a week before their permissions are due to expire and will need to ask the DM role-holders for any required extensions. As mentioned earlier, we are investigating whether the time limit requirement can be removed which would negate the need for any notifications.

- LSE payroll PSS in the department will be removed, and all permissions revoked, when they cease to be LSE payroll PSS in the department.

- All permissions will be revoked when a member of staff has their LSE Network Account closed.

- Someone added as a guest in a department who becomes a member of PSS in the same department will retain all of their permissions and the expiry date set for them as a guest will be removed as no longer relevant.

Support

- For support with technical issues, please contact tech.support@lse.ac.uk

- To give feedback on this guide, please submit your comments via the CST feedback form.