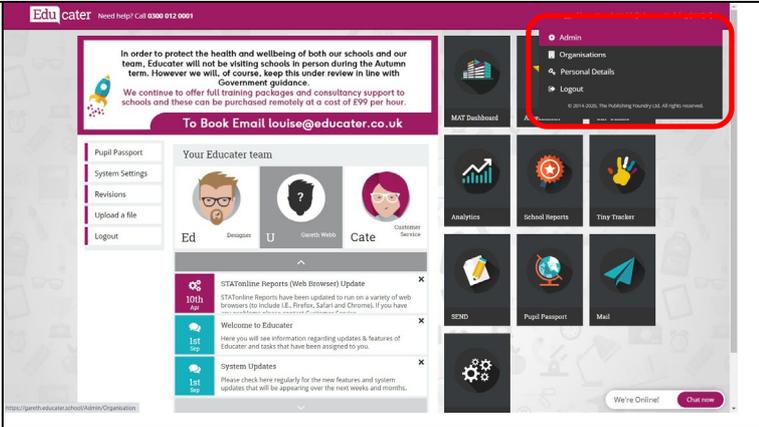
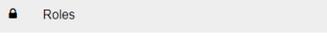
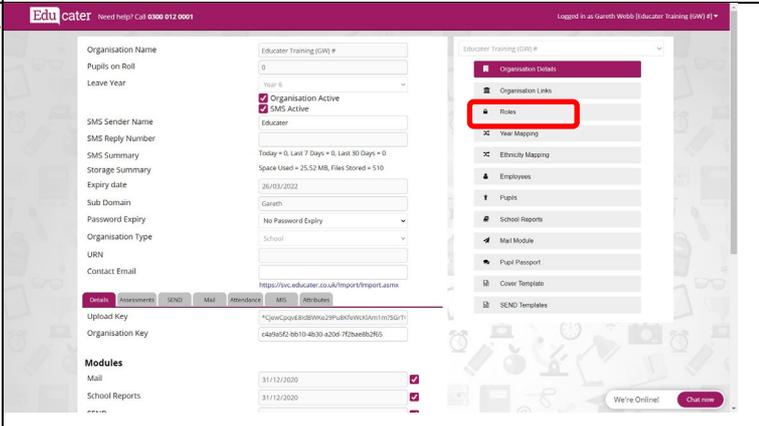
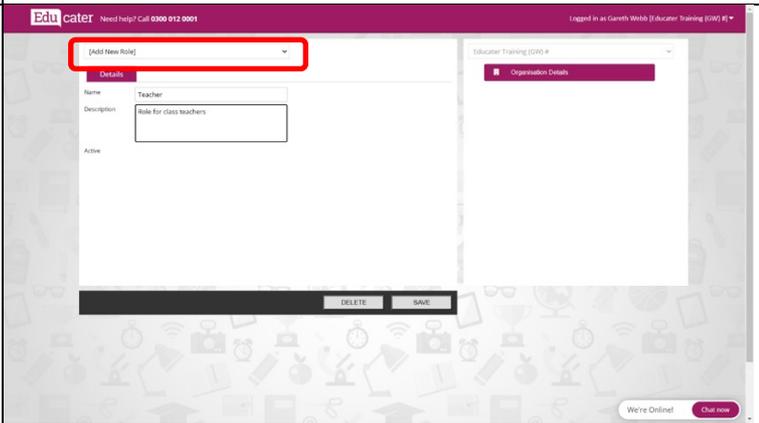


How to ... Create Roles

In Educater, before you can set up your users, you need to set up the roles to assign them to, for example, Class Teacher, SLT, TA etc. There is an almost infinite combination of roles, but here are some simple ideas to get started. You can explore more complex roles later if you like.

You need to have "full access" on your account to access the Admin Area.

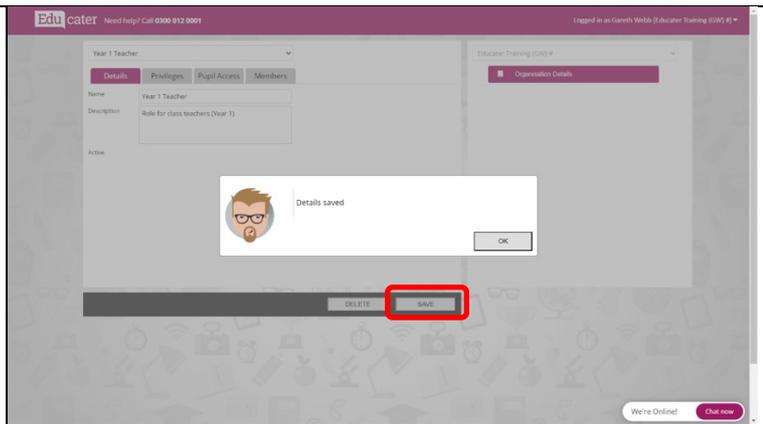
<p>1. Hover the mouse of the <i>down arrow</i> in the top right-hand corner of the screen – next to your username.</p> <p>Logged in as Gareth Webb [Educater Training (GW) #] ▼</p> <p>And click on </p>	
<p>2. From the menu on the right-hand side, click </p>	
<p>3. When you first log into Educater with the Admin login there will only be one role created – <i>Full Access</i> which gives you access to everything.</p> <p>To create a new roll, select <i>Add New Role</i> from the drop-down box.</p> <p>--Select Role-- --Select Role-- [Add New Role] System Manager</p>	

4. Type in a name and a description and click Save.

Year 1 Teacher

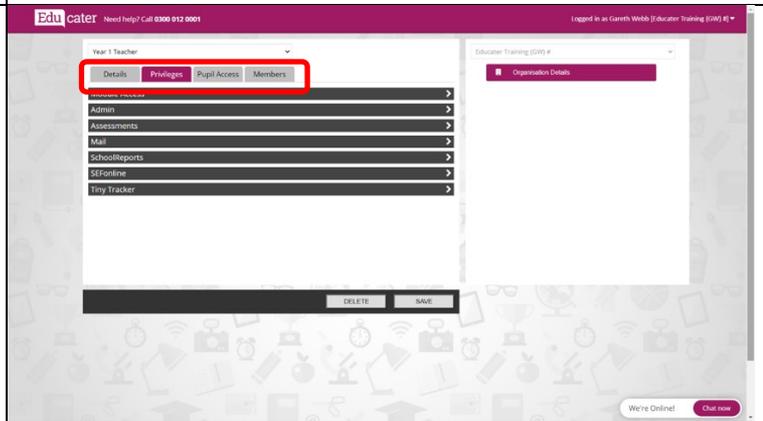
Role for class teachers (Year 1)

Now click **SAVE**



5. Now the role is created you can choose what privileges or permissions the role has.

From the tabs, click on Privileges.



6. First you need to choose which modules the users assigned to this role can access.

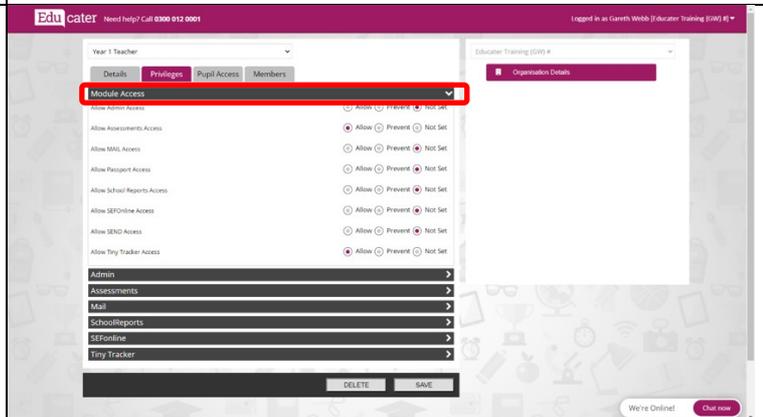
Click on **Module Access**

You can now select which Educater Modules the role can access.

At the end of this guide is a table showing our recommended settings for new schools to get you up and running quickly.

Allow Assessments Access Allow Prevent Not Set

Choose either **Allow** or **Not Set** for the moment. This will make it easier if you create more complicated roles in the future.



7. For each module you have granted access to, you now need to define the privileges within that module.
At the end of this guide is a table for our recommended settings for new schools.

Assessments

Allow Access to Filter management Allow Prevent Not Set

Allow Access to Group management Allow Prevent Not Set

Allow Access to Reports Allow Prevent Not Set

Change Active Subjects Yes No Not Set

Change Curriculum details Yes No Not Set

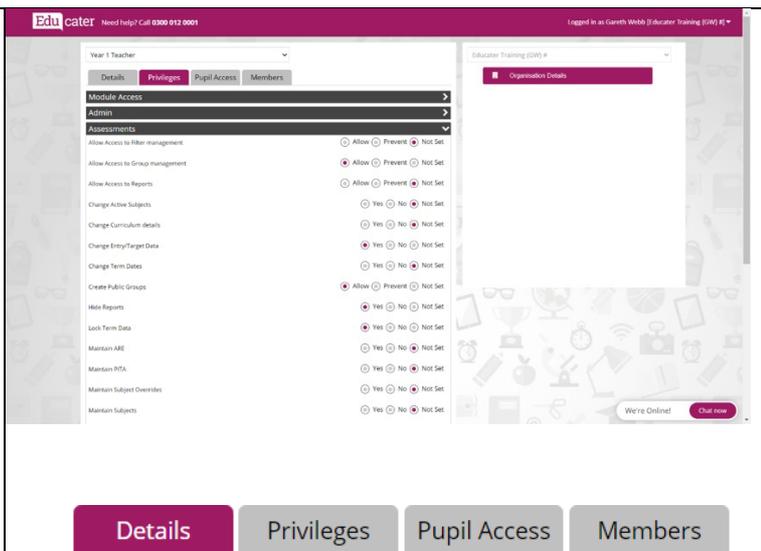
Change Entry/Target Data Yes No Not Set

Change Term Dates Yes No Not Set

Create Public Groups Allow Prevent Not Set

Hide Reports Yes No Not Set

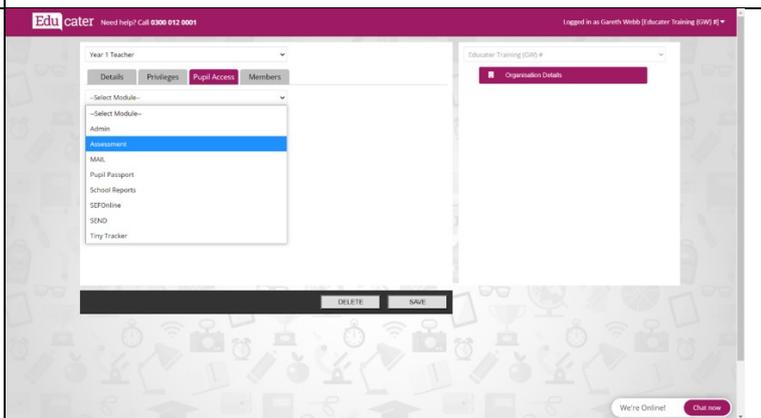
If you have not granted access to a module, you **do not** need to alter the privileges.



8. Once you have set up the privileges, you can now assign which children the role has access to.
 From the tabs click on:

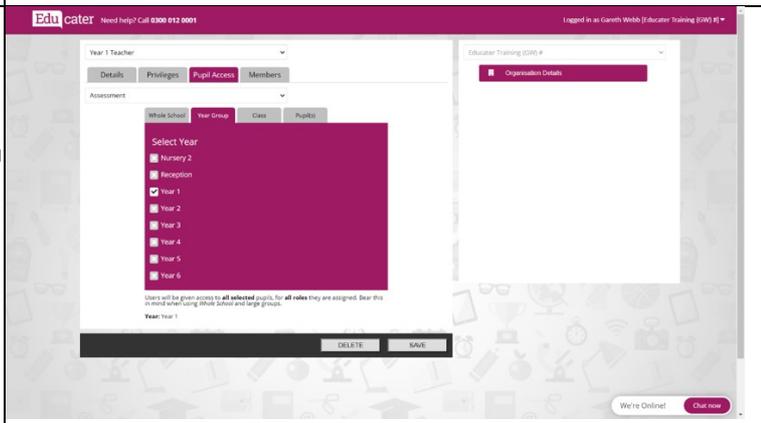


Then choose the first module you want to set from the drop-down box.



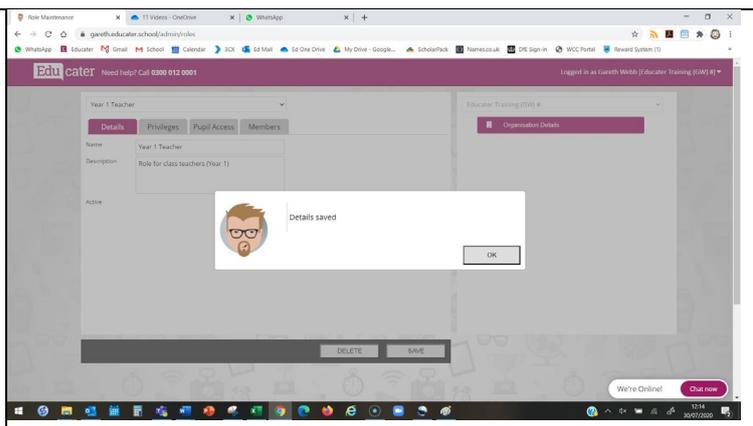
9. From the **Pupil Picker**, select which group of pupils this role will have access to.

Now repeat for the other modules you want this role to access.



10. Finally click
You now need to create your other roles for different year groups and SLT etc.

To assign users you can do this when setting up your employees, by following Help Sheet 23, *Set up your Employees*.



Get Going Quickly: Which Modules should I give people access to?

	Head/Deputy/ Assessment Lead/ Administrator	Other Leadership	Class Teachers and HLTA	Teaching Assistants
Allow Admin Access	<input checked="" type="radio"/> Allow	<input type="radio"/> Allow	<input type="radio"/> Allow	<input type="radio"/> Allow
Allow Assessments Access	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow
Allow MAIL Access	<input checked="" type="radio"/> Allow	<input type="radio"/> Allow	<input type="radio"/> Allow	<input type="radio"/> Allow
Allow Passport Access	<input checked="" type="radio"/> Allow	<input type="radio"/> Allow	<input type="radio"/> Allow	<input type="radio"/> Allow
Allow School Reports Access	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow	<input type="radio"/> Allow	<input type="radio"/> Allow
Allow SEFOnline Access	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow	<input type="radio"/> Allow	<input type="radio"/> Allow
Allow SEND Access	<input checked="" type="radio"/> Allow	<input type="radio"/> Allow	<input type="radio"/> Allow	<input type="radio"/> Allow
Allow Tiny Tracker Access	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow

Get Going Quickly: Which Assessment Privileges should I give people?

	Head/Deputy/ Assessment Lead/ Administrator	Other Leadership	Class Teachers and HLTA	Teaching Assistants
Allow Access to Filter management	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow	<input type="radio"/> Allow	<input type="radio"/> Allow
Allow Access to Group management	<input type="radio"/> Allow	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow	<input type="radio"/> Allow
Allow Access to Reports	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow
Change Active Subjects	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
Change Curriculum Details	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
Change Entry/Target Data	<input type="radio"/> Yes	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes
Change Term Dates	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
Create Public Groups	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow	<input checked="" type="radio"/> Allow	<input type="radio"/> Allow
Hide Reports	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
Lock Term Data	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes
Maintain ARE	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
Maintain PITA	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
Maintain Subject Overrides	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
Maintain Subjects	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
Maintain Terms	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
Maintain Tests	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
Modify Pupil Subscriptions	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes
Override PITA Data	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes
Override Step Data	<input type="radio"/> Yes	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes
Record Star Data	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes
Unlock Term Data	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> Yes	<input type="radio"/> Yes	<input type="radio"/> Yes