
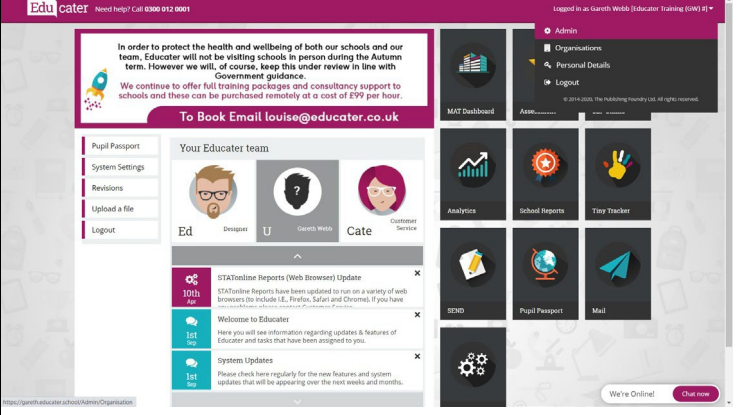

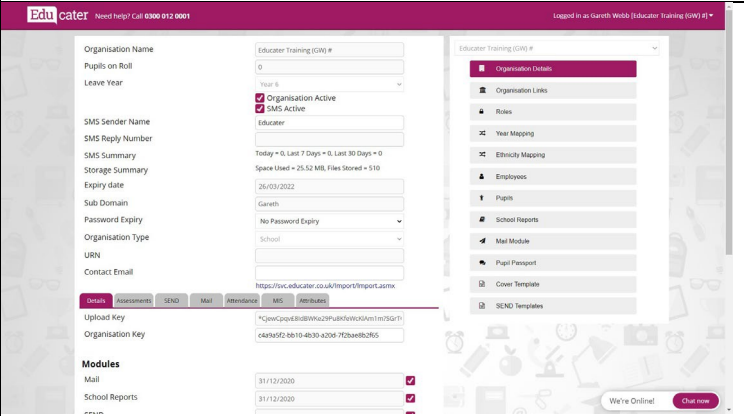
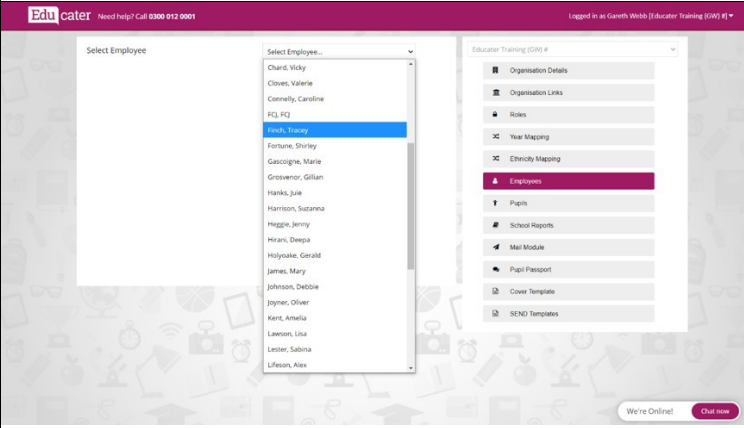


How to ... Set Up Your Employees

In most cases, your employees in Educater will be automatically synced with your MIS – in the same way as your pupils are. Here we will look at creating user accounts for them and assigning their privileges. Before you can assign privileges, you must first have created roles, by following Help Sheet 20, 'Roles'.

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

Please read carefully the important note in section 6 of this help sheet

<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  Admin</p>	
<p>2. From the menu on the right-hand side click  Employees</p>	
<p>3. Select the employee from the drop-down list</p> <p>Select Employee...</p> <p>Chard, Vicky</p> <p>Cloves, Valerie</p> <p>Connelly, Caroline</p> <p>FCJ, FCJ</p> <p>Finch, Tracey</p> <p>If you are not linked with your MIS, or wish to add other users who are not on your MIS, for example trainees or long-term supply staff, jump to step 9.</p>	

4. The first page contains the basic employee details from your MIS.

5. From the tabs, click on Login

Details Login Contact Permissions Attributes

Assign the user a **username** – this needs to be unique, so using their school email address is often a good idea.

Then choose a password for them and make a note of it for them. They will be encouraged to change this on your first login.

Username

Password

Confirmation

6. From the tabs click on Contact

Details Login Contact Permissions Attributes

This may contain information already stored in your MIS.

IMPORTANT NOTE:
 Educater will send confirmation texts and emails to new users as soon as they are created, we suggest these details are left blank for staff to complete when they first login. This way they can respond to the confirmations within the time limit.

7. From the tabs, click on Permissions

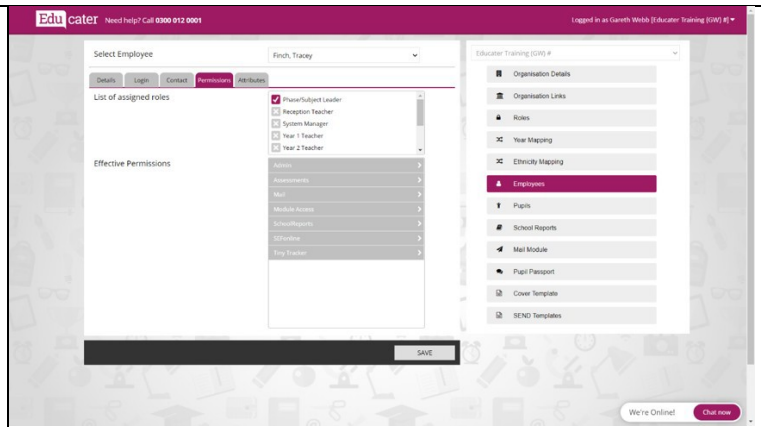
Details Login Contact **Permissions** Attributes

Tick which of the roles you want the user to have

List of assigned roles

- Phase/Subject Leader
- Reception Teacher
- System Manager
- Year 1 Teacher
- Year 2 Teacher

To make things simple to begin with, we suggest only giving staff one role. For example, if a class teacher also had subject leader responsibilities, they should be given the most senior level of access (i.e.) Phase/Subject Leader in this example).

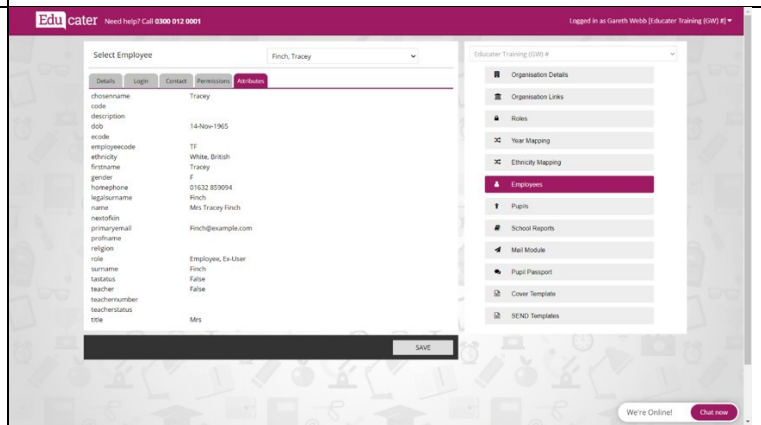


8. The final tab simply contains the extended employee details from your MIS

Details Login Contact Permissions **Attributes**

When you have finished, click

SAVE



9. If you want to add additional users that are not stored in your MIS, for example trainees or long-term supply staff, from the drop-down list, click

Select Employee...

Select Employee...

[Add New Employee]

Now work through steps 4-7 of this guide to add the required information and click **SAVE** when you have finished.

