

Users, Roles & Permissions.

Training Agenda



Target Audience

The **Users, Roles & Permissions** training is recommended for delivery to the following people from your school:

- ✓ MIS Managers/Administrators
- ✓ Deputy Headteacher

Objectives of Session

By the end of this session, attendees will be able to:

- ✓ Create and manage roles, permissions and user access.
- ✓ Create and maintain system and third-party user accounts.
- ✓ Use reporting and auditing tools to monitor user activity and access.

Agenda Overview

- ✓ **Roles & Permissions**
 - How to create/edit a Role
 - Using the different modules
 - Navigating/using the permissions grid
 - Viewing/Allocating Users
 - User Access Control
 - Using the Export/Import routine
 - Copying an existing Role
 - Audit/History Reports within Roles & Permissions
 - Switch Role Function
- ✓ **User Accounts**
 - How to create a System User
 - Linking to a Staff Record
 - Creating Login Details
 - Allocating Roles
 - Session Timeout
 - User Access Control
 - Editing Existing System Users
 - Allocating roles to multiple users
 - Security Settings
 - Single Sign-On
 - Accessing Staff User Accounts
 - Green Eye Icon on Staff Record
- ✓ **Third Party User Accounts**
 - How to create a Third Party User Account
 - Allocating dedicated Third Party/Write Back roles
 - How to allocate/manage Third Party permissions
- ✓ **Reporting**
 - System Logs
 - Online Report Repository
 - User Role Reports