

Hampshire Services for Schools

Creating/Pausing Users & Access Groups Summary

Creating User Accounts

Headteachers, Business Managers and senior Admin staff have the required access to create accounts for other members of your organisation. This can be done by logging in and completing the following steps.

Select 'Setup' on the menu-bar.

Select 'Create user'

Home Services Store Training Communication Resources **Setup** Basket

Setup | Setup

Sample Maintained Primary School

Core details

Sample Maintained Primary School

Code: SAMCODE

Hampshire Primary School

[View more](#)

CRM | Emergency contacts
+

Other information

Headteacher:

Opening hours:

Ofsted link:

GPS Easting:

GPS Northing:

Setup options

- [Core details](#)
- Other information
- MAT / Federation
- Additional categories

CRM

- [Key staff](#)
- Emergency contacts + Add

Quick actions

- [Create user](#)
- [Manage user](#)

Additional categories

Type	
LA	
Cluster	
Phase	
Area	
Ward	

Users

Total:	11
Global Administrators - Site Access	5
HCC Staff	2
Business Manager	1
Admin Staff with finance access	1
Headteacher	2

[Add new user](#)

Complete the relevant fields on the form, only those marked with * are mandatory.

General

Account type: ☒ User ☐ Non user

Status: ☒ Live ☐ Paused

Email: *

Email confirmed: *

Login Details

New password: *

Confirm password: *

Required password: ☒ change ☐ not change on next login

Password must be between 6 and 20 characters and contains both letter and numbers. It may contain these special characters: !,.,@#\$%^&*~

Personal Details

Name: Select Forename Surname *

Job title: *

Company: *

Telephone: *

Mobile

Address: Address - first line

Account type: A user refers to someone that actively logs on to the system. A non-user refers to someone who may have something booked on their behalf such as training.

Email: Named email address should be used (not Admin@ or Head@ emails)

Passwords: This can be set by the creator and updated by the account holder after their first log in.

Personal Details: As part of the organisation (their school details).

Other Details

Comments:

Comments

DOB:

dd/MM/yyyy

31

Ethnicity

Select

Special requirements:

Special requirements

Roles

Select:

☐ Administration Officer
☐ Early Years Setting Owner / Manager
☐ School Business Manager

☐ Bursar or Finance Officer
☐ Early Years Setting Staff
☐ SENCO

☐ Childminder
☐ Governor / Trustee
☐ Senior Leader

☐ Clerk
☐ HCC Staff
☐ Site Manager

☐ Deputy Headteacher
☐ Headteacher / Principal
☐ Teacher

☐ Designated Person for CP
☐ IT Technician
☐ Teaching Assistant (TA)

☐ Designated Person for LAC
☐ NQT (Newly Qualified Teacher)

Additional Fields

Declaration of Govern...

Name of business:

Nature of business:

Nature of interest:

Date of appointment ...

Date of cessation of i...

I have read: Keeping ...

☐ Yes
☐ No

Date of confirmation:

Access Rights

Customer access:

This user has no rights to perform actions on behalf of any customers.

Add new access rights

Save changes

Save

Other Details: These are not required.

Roles: Select the most appropriate role. (If you require a role that is not available, please contact the Hampshire Services for Schools Admin Team).

Additional Fields – Not required, for Governor use only.

Access Rights: Select the most appropriate based on the role. Summary on what each access group entails is detailed on the table below.

Pausing User Accounts

Headteachers, Business Managers and senior Admin staff have the required access to pause accounts for other members in their organisation. This can be done by logging in and completing the following steps.

Select 'Setup' on the menu-bar.


Select either 'Manager User' or the edit pencil on the Users window


The screenshot shows the 'Setup' page for 'Sample Maintained Primary School'. The top navigation bar includes 'Home', 'Services', 'Store', 'Training', 'Communication', 'Resources', and 'Setup' (circled). The right-hand side has a 'Basket' icon. The main content area is divided into two columns. The left column has sections for 'Core details' (showing school name, code, and logo) and 'CRM | Emergency contacts'. The right column has sections for 'Setup options' (with links to 'Core details', 'Other information', 'MAT / Federation', and 'Additional categories'), 'CRM' (with 'Key staff' and 'Emergency contacts'), 'Quick actions' (with 'Create user' and 'Manage user' circled), and 'Additional categories' (listing Type, LA, Cluster, Phase, Area, and Ward). At the bottom right, the 'Users' section shows a list of user roles and counts, with an edit pencil icon circled.

Users	
Total:	11
Global Administrators - Site Access	5
HCC Staff	2
Business Manager	1
Admin Staff with finance access	1
Headteacher	2

[Add new user](#)

Select 'Edit' on the user you wish to pause

Users | Register
List of all your users

Filters

User

Text Search

Type

All

system users


delegates only / non users

Include


Paused user


Access rights












Group



 Search

Apply filters and view results

 Results

 Export


T.	Forename	Surname	Job title	Email	Logg...	Edit
						Edit
						Edit
						Edit
						Edit
						Edit
						Edit
	Emma	Lynn	Administrative Officer		994	Edit
						Edit
						Edit
						Edit
						Edit


1

20 items per page

1 - 11 of 11 items

Select 'Account and Contact Details' on their user profile

Setup

Activity

Account and Contact Details

User account details including username (email), password reset, and contact information, as well as Role selection and additional fields. You can also Pause a user from here.

User Rights/Groups

Add or update user rights from this page. You can select a different Group for any number of sites and providers.

Site Alert Options

Create or update user alert preferences from this page. You can set different alert options for each Site that this user has access rights for.

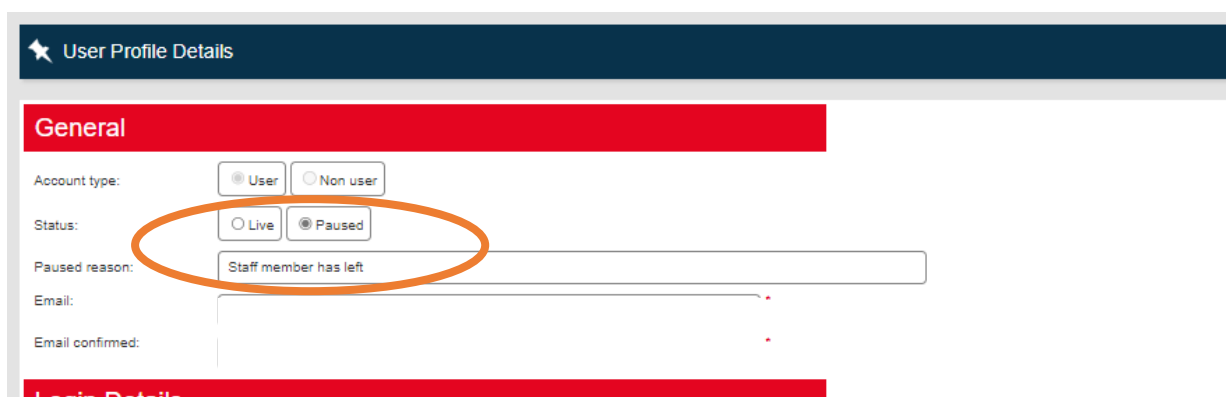
User Dashboard

A more details summary page including contact details and a breakdown of this users activity within SLA Online, including booked and historic training courses.

History Log

A list of all system activities for the user, including page views and updates.

Select 'Pause' and enter the reason



User Profile Details

General

Account type: ☒ User ☐ Non user

Status: ☐ Live ☒ Paused

Paused reason: Staff member has left

Email:

Email confirmed:

Login Details

Select 'Save' at the bottom of the page and that user will now be paused.

Access Groups Summary

Access group name	Summary of access
Admin Staff with finance access	<ul style="list-style-type: none">• Full access to Resources, Articles, Finance Reports and Training minus some organisation training reports and the governor module.• Ability to check items out from basket.• Can create staff accounts for organisation.
Admin Staff with finance access / Governor	<ul style="list-style-type: none">• Access group will only work when attached to governing board• Full access to Resources, Articles, Finance Reports and Training minus some organisation training reports and the governor module.• Ability to check items out from basket.• Can create staff accounts for organisation.• Governor access when attached to a governing board.
Admin Staff with finance access / Observer	<ul style="list-style-type: none">• Access group will only work when attached to governing board• Full access to Resources, Articles, Finance Reports and Training minus some organisation training reports and the governor module.• Ability to check items out from basket.• Can create staff accounts for organisation.• Governor observer access when attached to a governing board.
Admin Staff with finance access / Clerk	<ul style="list-style-type: none">• Access group will only work when attached to governing board• Full access to Resources, Articles, Finance Reports and Training minus some organisation training reports and the governor module.• Ability to check items out from basket.• Can create staff accounts for organisation.

	<ul style="list-style-type: none"> • Clerk access when attached to a governing board.
Admin Staff without finance access	<ul style="list-style-type: none"> • Full access to Resources and Articles. • Can only see own training reports, no organisational ones. • No access to Finance Reports. • Cannot check out but can browse store and add items to basket. • Can create staff accounts for organisation.
Admin Staff without finance access / Clerk	<ul style="list-style-type: none"> • Access group will only work when attached to governing board • Full access to Resources and Articles. • Can only see own training reports, no organisational ones. • No access to Finance Reports. • Cannot check out but can browse store and add items to basket. • Can create staff accounts for organisation. • Clerk access when attached to a governing board.
Admin Staff without finance access / Governor	<ul style="list-style-type: none"> • Access group will only work when attached to governing board • Full access to Resources and Articles. • Can only see own training reports, no organisational ones. • No access to Finance Reports. • Cannot check out but can browse store and add items to basket. • Can create staff accounts for organisation. • Governor access when attached to a governing board.
Associate Tutors	Not for Use - Access group for Governor Services use only
Business Manager	<ul style="list-style-type: none"> • Full access to Resources, Articles and Finance Reports and Training minus the governor module. • Ability to check items out from basket. • Can create staff accounts for organisation.
Business Manager / Clerk	<ul style="list-style-type: none"> • Access group will only work when attached to governing board • Full access to Resources, Articles and Finance Reports and Training. • Ability to check items out from basket. • Can create staff accounts for organisation. • Clerk access when attached to a governing board.
Business Manager / Governor	<ul style="list-style-type: none"> • Access group will only work when attached to governing board • Full access to Resources, Articles, Finance Reports and Training. • Ability to check items out from basket. • Can create staff accounts for organisation. • Governor access when attached to a governing board.
Clerk	<ul style="list-style-type: none"> • Access group will only work when attached to governing board

	<ul style="list-style-type: none"> • Can add/remove governors and amend board membership information • Can create meetings and upload documents for the board • Full access to Resources, Articles and Training – • Training from Governor Service can be automatically checked out
Deputy Headteacher	<ul style="list-style-type: none"> • Full access to Resources, Articles, Finance Reports and Training minus the governor module. • Ability to check items out from basket. • Can create staff accounts for organisation.
Deputy Headteacher / Observer	<ul style="list-style-type: none"> • Access group will only work when attached to governing board • Full access to Resources, Articles, Finance Reports and Training. • Ability to check items out from basket. • Can create staff accounts for organisation. • Governor observer access when attached to a governing board.
Deputy Headteacher/ Governor	<ul style="list-style-type: none"> • Access group will only work when attached to governing board • Full access to Resources, Articles, Finance Reports and Training. • Ability to check items out from basket. • Can create staff accounts for organisation. • Governor access when attached to a governing board.
Governance Board Advisor/Observer	<ul style="list-style-type: none"> • Access group will only work when attached to governing board • Access given by Clerk • Can view documents uploaded by clerk/governors • Full access to Resources and Articles
Governors	<ul style="list-style-type: none"> • Access group will only work when attached to governing board • Access given by Clerk • Can create meetings and upload documents for the board • Full access to Resources, Articles and Training – • Training from Governor Service can be automatically checked out
HCC Staff	Not for Use - Access group for HCC staff to receive updates from Hampshire Services admin team
Headteacher	<ul style="list-style-type: none"> • Full access to Resources, Articles, Finance Reports and Training minus the governor module. • Ability to check items out from basket. • Can create staff accounts for organisation.
Headteacher / Principal / Governor	<ul style="list-style-type: none"> • Access group will only work when attached to governing board • Full access to Resources, Articles, Finance Reports and Training. • Ability to check items out from basket. • Can create staff accounts for organisation.

	<ul style="list-style-type: none"> Governor access when attached to a governing board.
HGS Use - Associate Tutors	Not for Use - Access group for Governor Services use only
HGS Use - HGA Member	Not for Use - Access group for Governor Services use only
HGS Use - IOW Governor Services Lead	Not for Use - Access group for Governor Services use only
HGS Use - IOW Governors	Not for Use - Access group for Governor Services use only
HGS Use - LA Clerks	Not for Use - Access group for Governor Services use only
Historic Customers / Governors	<ul style="list-style-type: none"> No access to anything within the system.
Site Manager / Governor	<ul style="list-style-type: none"> Resource and Article access only. Governor access when attached to a governing board.
Site Managers / Caretaker	<ul style="list-style-type: none"> Resource and Article access only.
Teacher	<ul style="list-style-type: none"> Full access to Resources and Articles. Can only see own training reports, no organisational ones. No access to Finance Reports. Cannot check out but can browse store and add items to basket. Cannot create staff accounts for organisation.
Teacher / Governor	<ul style="list-style-type: none"> Full access to Resources and Articles. Can only see own training reports, no organisational ones. No access to Finance Reports. Cannot check out but can browse store and add items to basket. Cannot create staff accounts for organisation. Governor access when attached to a governing board.
Temporary no access users	<ul style="list-style-type: none"> No access within the system. Can be used for staff on maternity leave/long sickness leave - this will prevent Hampshire Services admin team referring account requests to those members of staff.
TEST Clerk	Not for Use - Access group for Governor Services use only
TEST Governor	Not for Use - Access group for Governor Services use only