SchoolSoft

Quick Start Guide – Staff Accounts

Adding, removing and modifying staff accounts is an easy process. In order to do this you must be an Office Administrator or a System Administrator. You can modify the staff accounts at any time in the future.

Step 1 – Log in using your email address and password.

Step 2 – Click on STAFF TAB.

Step 3 – Click on ADD STAFF MEMBER to create a new staff account or EDIT to update an existing staff account

Step 4 – Complete the fields and click SUBMIT

*Note about PASSWORDS
If you leave the PW fields blank the system will generate a random password. OR You can enter a standard password that will be sent to the staff member.

Passwords are case sensitive and must be a minimum of 6 characters.

Place the email in the email field, assign a username, for simplicity the email can be used as the username as well. This can be changed by the staff member upon logging in.

The TEACHING ASSIGNMENT is viewed by parents when they book interviews. The Teaching Assignment can only be changed by someone with Admin access. You should attempt to keep the text in this field as brief and consistent as possible. E.g. MA, LA, Sci.

The LOCATION is viewed by parents when they book interviews. The LOCATION can only be updated by someone with Admin access. You should keep the format as consistent as possible. E.g. Room 102, Room 308, Gym, Library, etc.

Once you click SUBMIT, the staff member automatically receives an email containing their password and login instructions.

Edit Staff Profile

STAFF INFORMATION

First Name: Chester
Last Name: Acorn
Mr.

Email Address: cam@schoolsoft.ca
Username (used for log in): cam@schoolsoft.ca

Password: ••••••
Confirm Password: ••••••

OTHER INFORMATION

Staff/Teaching Assignment: Kindergarten
Conference Location or NA: Tiny Room

Teacher Note to Parents
The teacher note is optional and only used in the current (or yet to be active) conference round. It is displayed to a parent booking an appointment with you and is included in the associated emails. The teacher note is only displayed in the Conference Session(s) configured to include the teacher note. (300 character limit)

Testing of teacher note -- change made by System Admin.

Virtual Conference URL
This meeting link may expire and need to be updated in the future.

https://meet.google.com/eer-yvbu-qqe

Status: Active
Role: Teacher
Visible to Parents: ✓ Yes

Last Logged In: Fri, Oct 01
Logged In From: 98.161.247.31

CANCEL   SUBMIT

The ROLE allows you to customize the access level for each staff member:

TEACHERS
…Can login to view and print the bookings made by parents. Teachers can also reserve time blocks when they are not available to parents.

OFFICE ADMIN
…Can manage parent and staff accounts. Also have the ability to view the Master Schedule to book, edit and cancel appointments. An Office Admin is usually someone who helps out during interview time.

SYSTEM ADMIN
…Is the person responsible for managing the Conference Manager and has full access to ALL functionality. Usually this includes the Principal, Vice Principal(s) and head secretary.

VISIBLITY TO PARENTS
Select YES for a staff member who participates in interviews and will be visible to parents.

Select NO for a staff member who participates in interviews (e.g. resource teacher, Principal, etc.) but whose bookings are typically made by office staff.

Select NO for a staff member who never participates in interviews (E.g. Secretary, Office staff, etc)