

## 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 MANAGE STAFF ACCOUNTS

Step 3 – Click on ADD STAFF MEMBER

Step 4 – Complete the required fields and click SUBMIT

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

\*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.

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.

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 ROLE allows you to customize the access level for each staff member:  
**TEACHERS**  
 ...Can login to view and print the bookings made by parents. They 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.

**VISIBILITY 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)