Training Course Agenda.

Users, Roles & Permissions

Bromcom
No.1 Choice for Cloud MIS & Finance

Introduction

Target Audience

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

- ✓ MIS Managers
- ✓ MIS Administrators
- ✓ Deputy Headteacher/Senior Teacher

Facilities/Requirements

For **Onsite Training**:
Using the means provided by the establishment for example a whiteboard or projector, the trainer will deliver a session for the module being trained on. An internet connection will be required.

In some instances, attendees will be able to login to follow along with the session, this will be arranged beforehand and in this case login information will be supplied.

For **Webinar Training**:
This session will be delivered via an internet connection, you will be sent a link and login details in an e-mail. We ask that you test the link before the session to make sure you have access, if you do not your IT support should be able to help you with this. If you still cannot connect please let us know as soon as you can, we will try to help or arrange an alternative method to deliver the training.

Objectives of Session & Timings

The Attendees will work together with their trainer to learn about the host of features within the module being trained and how best they can take advantage of these.

These sessions will teach you how to operate and manage your Bromcom MIS on a day-to-day basis.

Agenda Overview

Part One: 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

Part Two: 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

Part Three: 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

Part Four: Reporting

- ✓ Online Report Repository
  - Importing/using Role Permissions, Roles Allocation and User Role Allocation reports

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