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# Staff Starter Checklist

## Primary Schools

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Publication date: November 2017

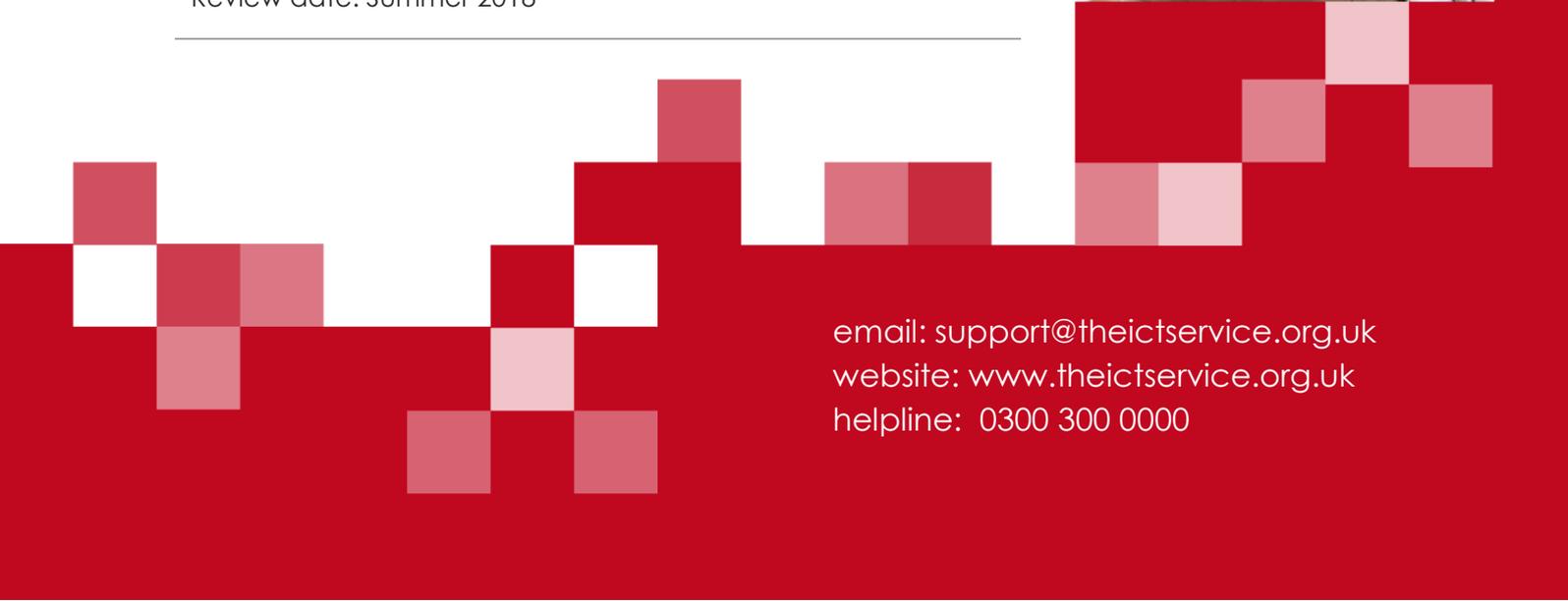
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Version: 3.0

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Review date: Summer 2018

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**Accounts & Permissions Guidance/Checklist – includes generic email accounts for Staff & Governors**

**Important Note: Ensure that login details for essential school administrative accounts, especially Secure Access, are retained in a secure place to cover any sudden unavailability of key staff members.**

Various accounts and access permissions need to be set up for new school staff, preferably in advance.  
**Access may not be required/authorised for all areas, but the following should be considered:**

<b>Personnel</b>	Newly employed staff should first of all be added in SIMS Personnel as appropriate – basic details, contracts, DBS checks, qualifications, etc – usually completed by Personnel Officer/Assistant
<b>Active Directory Account (Windows login)</b>	Required to enable staff to access school computers – set up on school server – ensure the account is set up in the correct user group, e.g. Office, Staff, Teachers, TAs, etc
<b>Central Hosting Account</b>	Set up in the Admin Tool by the school's Admin Tool User (ATU) – it is expected that every school will have its own trained ATU – ensure the account is set up in the correct group, i.e. Office or Staff ( <b>note:</b> members of the Office group will have access to the files in Office Share, some of which will be confidential to Admin Staff) – include the following <b>if appropriate:</b> <ul style="list-style-type: none"> <li>▪ SIMS access (a SIMS account will be required – see below)</li> <li>▪ FMS access (an FMS account will be required – see below)</li> <li>▪ Microsoft Office access (Standard/Pro depending on the Microsoft Office licences held by the school)</li> <li>▪ Email – tick box to create named account mailbox (<b>note:</b> there is a specific procedure for generic email accounts – see below)</li> <li>▪ Access to other applications if appropriate, e.g. Schoolcomms, Discover, Agora, etc</li> <li>▪ Check regarding Secure Level 3 access folders – restricted access – enable if authorised</li> </ul>
<b>SIMS Account if required</b>	<b>Note: New SIMS users will require training – see our website at <a href="http://www.theictservice.org.uk/training">www.theictservice.org.uk/training</a></b>  New account should be set up in SIMS by the school's SIMS System Manager: Use Focus   System Manager   Manage Users <ul style="list-style-type: none"> <li>▪ New staff member should have already been added in SIMS Personnel</li> <li>▪ To check whether they are/were a SIMS User, in Find User change all settings to &lt;Any&gt; and click Search – check whether the person is already on the list – if so, open the record and check/edit details and permissions as appropriate</li> <li>▪ If not a current/previous SIMS User, create a new SIMS User Account – in Find User, click New – type in Surname only – click Continue – if an exact match shows in the Matched</li> </ul>

	<p>People box (check name and role), highlight it and click Open (this prevents duplicates) – then Save the record – details and permissions can then be edited as required</p> <ul style="list-style-type: none"> <li>▪ <b>NOTE:</b> if there is no exact match (name and role) in the Matched People box, this indicates that the person hasn't yet been added in SIMS Personnel – close out of System Manager and check before proceeding</li> <li>▪ Generic accounts (i.e. not for a named person) should not be set up in SIMS.</li> </ul>
<p><b>FMS Account if required</b></p>	<p><b>Note: New FMS users will require training – see our website at <a href="http://www.theictservice.org.uk/training">www.theictservice.org.uk/training</a></b></p> <ul style="list-style-type: none"> <li>▪ FMS accounts are only for Finance personnel/Headteacher</li> <li>▪ New accounts are set up in FMS by the school's FMS Administrator: <ul style="list-style-type: none"> <li>▪ Use Tools   Manage Users – add new user account – set permissions as required.</li> </ul> </li> </ul>
<p><b>Generic Email Accounts</b></p>	<p><b>There are special setups for such accounts,</b> e.g. Head@, Office@, Finance@, Chair@, Clerk@</p> <p>Some schools may have set up other similar accounts, such as SENCO@, and these may need to be treated in the same way:</p> <ul style="list-style-type: none"> <li>▪ <b>Head@, Office@ and Finance@</b> – these are pre-existing stand-alone email accounts and should remain so – correspondence from Local Authority departments (including The ICT Service) is sent out to these generic email addresses.</li> </ul> <p>Access to these email accounts by named individuals is set up and removed by the ATU as required – highlight the relevant email account in the Admin Tool, e.g. Office@ – right click and go to Email Tasks &gt; Mailbox Permissions – click Add – search for and select the user who requires access to the account – click OK to complete.</p> <p>After a few minutes, the user will see an additional mailbox for the generic account when opening their Outlook. This setup removes the need to remember additional login credentials for the generic account.</p> <p>The generic account password should be reset whenever there is a change in the personnel who have access to it, as this type of account can still be accessed online if the password is known.</p> <p>The generic email accounts themselves should not be deleted or changed.</p> <p>There should be no automatic forwarding from these accounts to other email accounts.</p> <p>There must be a historical record of correspondence</p>

	<p>available to the incoming Head/Administrator/Finance Officer.</p> <ul style="list-style-type: none"> <li>▪ <b>Chair@ &amp; Clerk@</b> – these are pre-existing stand-alone Governor email accounts and should remain so – correspondence from Local Authority departments (including The ICT Service) is sent out to these generic email addresses.</li> </ul> <p>Access to these email accounts by named individuals is controlled by the school's ATU – the password should be reset and notified to the new Chair or Clerk whenever there is a change of office.</p> <p>The accounts themselves should not be deleted or changed.</p> <p>There should be no automatic forwarding from these accounts to other email accounts.</p> <p>There must be a historical record of correspondence available to the incoming Chair and Clerk.</p>
<b>Admin Tool User/Operator (ATU)</b>	<p>If possible, arrange for a new ATU to be authorised and trained before the existing ATU leaves. Schools can have more than one ATU.</p> <p>ATU permissions are set up by the Helpline once the required paperwork/training has been completed.</p> <p>If necessary, the Helpline can temporarily assist with Admin Tool requirements during periods with no ATU; but for security reasons it is preferable for schools to have their own designated ATU(s).</p>
<b>Login credentials for other modules/programmes/websites</b>	<p>These should be set up or transferred as appropriate, e.g. SIMS Learning Gateway (SLG), Secure Access (includes S2S, COLLECT, KTS, GIAS, ASP), NCA Tools, Fischer Family Trust (FFT), Agora, Schoolcomms, WebCAT, etc</p> <p><b>Training is required before using some modules, e.g. Agora, Schoolcomms, etc – see our website at <a href="http://www.theictservice.org.uk/training">www.theictservice.org.uk/training</a></b></p>

<b>Tick Sheet (accounts/permissions as appropriate for each staff member)</b>		
<b>Name:</b>		
<b>Accounts / Permissions</b>	<b>Completed</b>	<b>Comments / Queries</b>
SIMS Personnel Details		
Active Directory Account		
Central Hosting Account: SIMS Access FMS Access Microsoft Office Access Personal Mailbox Schoolcomms Access Discover Access Level 3 Access		
SIMS Account		
FMS Account		
Generic Email Account Access: Head@ Office@ Finance@		
Governor Generic Email Access: Chair@ Clerk@		
Admin Tool User/Operator (ATU)		
Other modules/programmes/websites: SIMS SLG Secure Access NCA Tools FFT Aspire Agora Schoolcomms WebCAT		
Additional Accounts/Notes		