



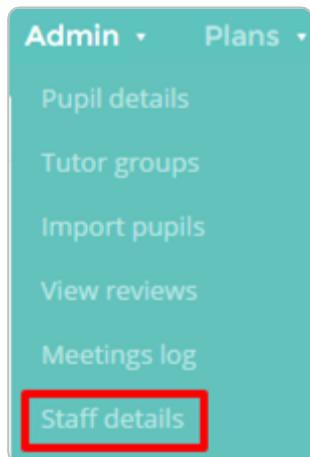
ProvisionMap

Quick start guide

Getting started with staff
management

Staff management in Provision Maps

As a Provision Map admin, you can manage the accounts of staff members that use the system. This quick start guide covers how to add, edit and remove users, how to reset passwords and how to set access permissions for each individual staff member.



The screenshot shows a teal-colored sidebar menu. At the top are two tabs: "Admin" with a dropdown arrow and "Plans". Below these are several menu items: "Pupil details", "Tutor groups", "Import pupils", "View reviews", "Meetings log", and "Staff details". The "Staff details" button is highlighted with a red rectangular border.

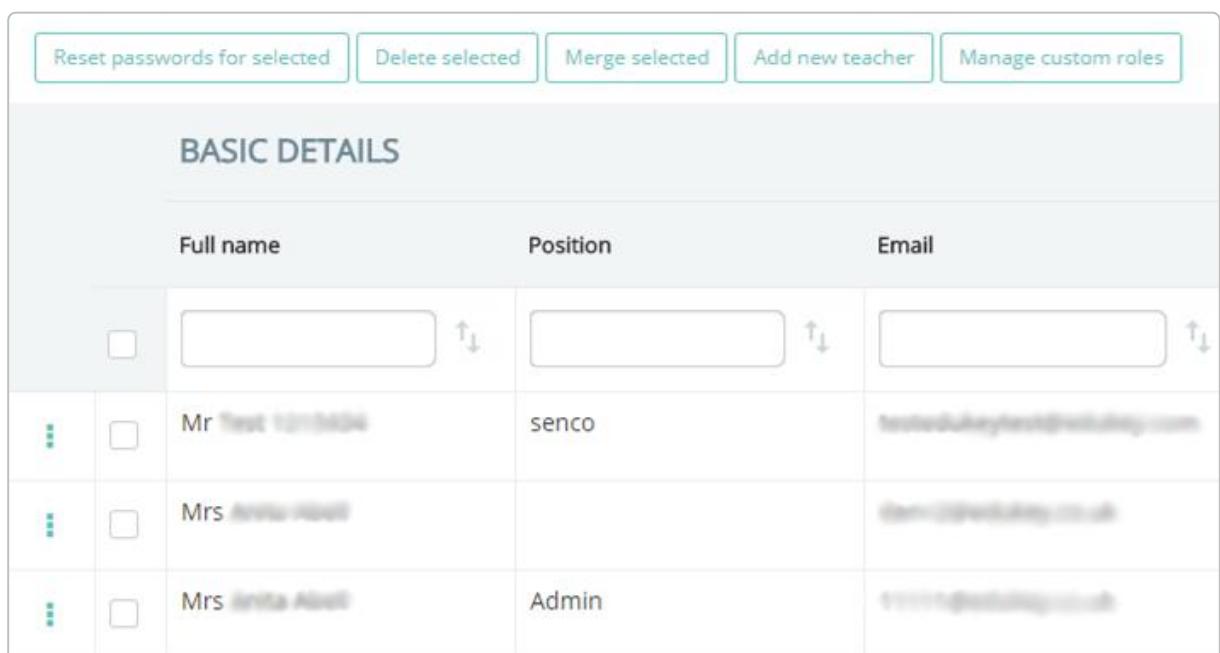
Accessing staff members

To view a list of staff members that are currently in Provision Map, mouse over the [Admin](#) tab and select [Staff Details](#).

From this page, you will be presented with a list of each staff member along with their [account type](#) and their [email address](#).

Searching the Staff details page

The staff list can be easily filtered by using the [search bars](#) above each column to refine the results. Click on the [arrow icons](#) on each column to sort the table in ascending or descending order by that column.



The screenshot shows a table titled "BASIC DETAILS" containing staff information. At the top of the table are five buttons: "Reset passwords for selected", "Delete selected", "Merge selected", "Add new teacher", and "Manage custom roles". The table has four columns: "Full name", "Position", and "Email", plus a fourth column with checkboxes and a "More" icon.

	Full name	Position	Email
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
⋮ <input type="checkbox"/>	Mr Test Test Test	senco	test@dukeyandwiley.com
⋮ <input type="checkbox"/>	Mrs Test Test		test@dukeyandwiley.co.uk
⋮ <input type="checkbox"/>	Mrs Test Test	Admin	test@dukeyandwiley.co.uk

Adding staff members to Provision Map

If your Provision Map account is [linked with your school's MIS](#), staff members will be [automatically added](#) to the software. Any changes made in your MIS will also come through, such as edited teacher details or deleted staff members.

If Provision Map is not integrated with your MIS or you would prefer to add teachers directly through Provision Map, there are two methods of adding new staff available.

Add new teacher

Adding a new member of staff

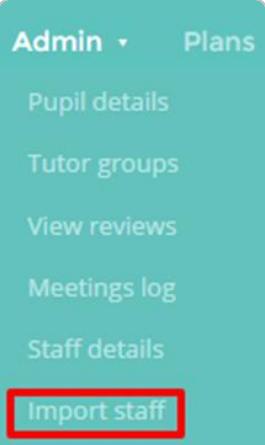
To add a new member of staff, click on [the Add new teacher button](#) on the [Staff details](#) page

A popup form will appear, allowing you to enter details about the new staff member. Click on the [Save teacher](#) button once you have finished.

Bulk importing staff members

To add multiple staff members at once, mouse over the [Admin](#) tab and select [Import staff](#).

You will need an [Excel spreadsheet](#) containing the list of staff members that you'd like to import. The spreadsheet must follow a specific template, which is provided in the [Resources](#) section of the [Import Staff](#) page.



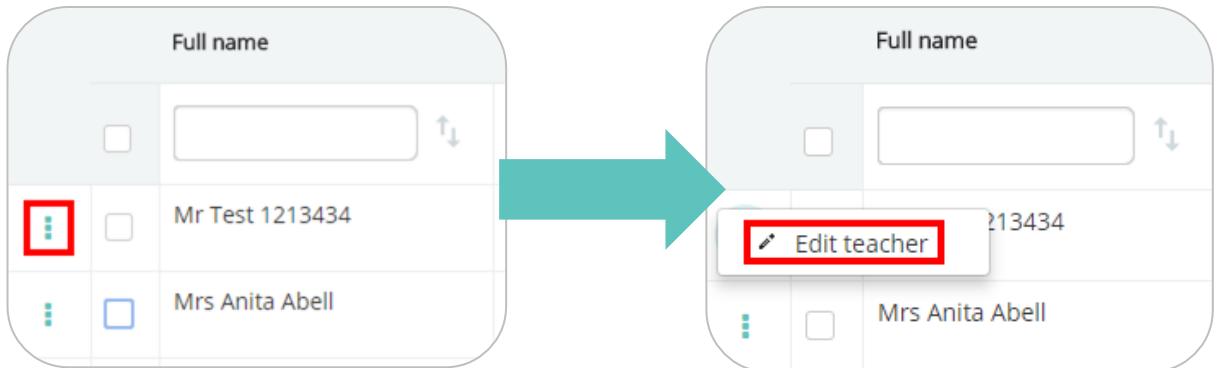
Next, upload the spreadsheet by selecting the file from the [Choose file](#) button and clicking [Import](#).

spreadsheet_staff.xlsx

You will be given the opportunity to review the staff list before they are imported. Once you are certain that the data is correct, click on the [Import](#) button in the top right hand corner to add the uploaded staff members to the [Staff details](#) page.

Editing staff details

To edit a staff member's details, click on the **three dots** in their row and select **Edit teacher** from the popup menu. The **Edit teacher** form will appear, allowing you to make changes to the staff member's record.



Deleting staff members

To delete staff members from Provision Map, select the teachers you would like to delete by clicking on their row and click on the **Delete selected** button above the teacher list.

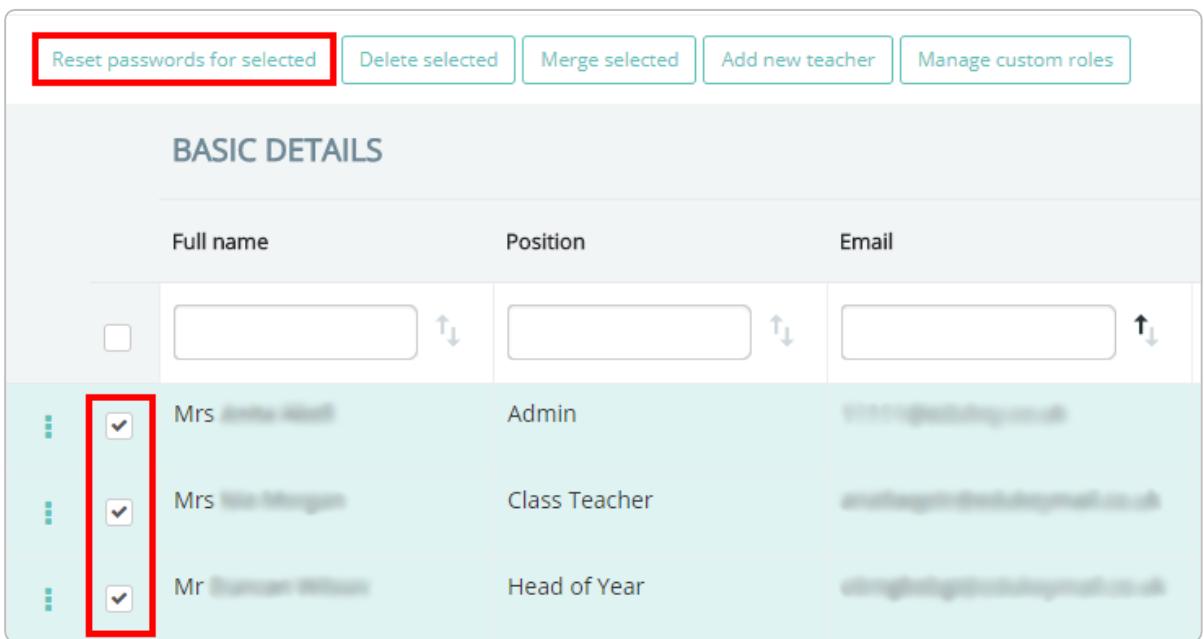
This screenshot shows the 'BASIC DETAILS' section of the Provision Map interface. At the top, there are five buttons: 'Reset passwords for selected', 'Delete selected' (which is highlighted with a red box), 'Merge selected', 'Add new teacher', and 'Manage custom roles'. Below these buttons is a table with columns for 'Full name', 'Position', and 'Email'. The 'Full name' column contains four rows of staff names: 'Mr Test 1213434', 'Mrs Anita Abell', 'Mrs Anita Abell', and 'Mrs Mary Anderson'. The first three rows have red boxes around their three-dot menu icons, indicating they are selected for deletion. The 'Delete selected' button is also highlighted with a red box.

Full name	Position	Email
Mr Test 1213434	senco	testteacher@outlook.com
Mrs Anita Abell		anita@outlook.com
Mrs Anita Abell	Admin	anita@outlook.com
Mrs Mary Anderson		mary@outlook.com

Resetting staff passwords

If a staff member forgets the password to their Provision Map account, a School Admin user can reset it on their behalf through the [Staff details](#) page.

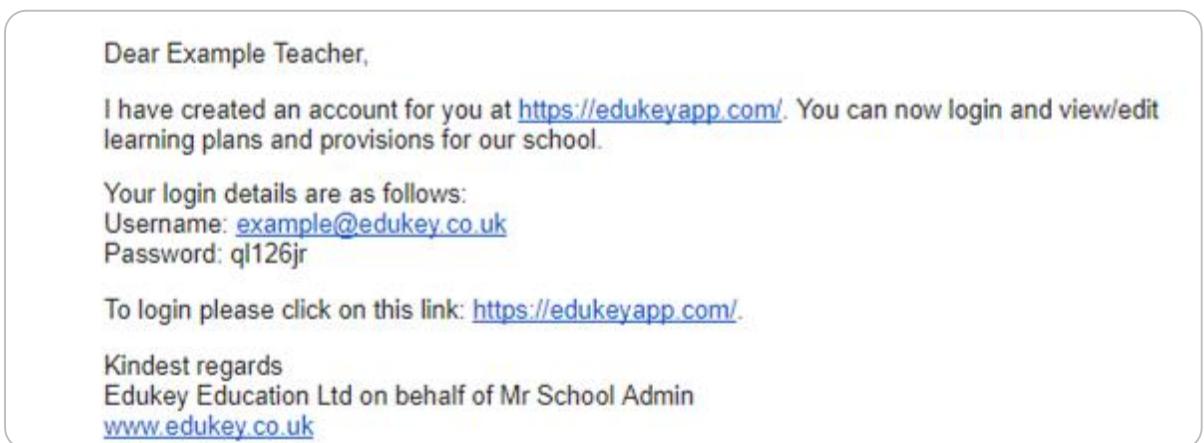
To do this, select the rows for the affected staff members and click on the [Reset passwords for selected](#) button above the list of teachers.



The screenshot shows the 'Staff details' page with the following interface elements:

- Top navigation bar with buttons: [Reset passwords for selected](#) (highlighted with a red box), [Delete selected](#), [Merge selected](#), [Add new teacher](#), and [Manage custom roles](#).
- Section header: **BASIC DETAILS**
- Table with columns: **Full name**, **Position**, and **Email**. The first column contains checkboxes for selection.
- Data rows:
 - Mrs [redacted] (checkbox checked)
 - Mrs [redacted] (checkbox checked)
 - Mr [redacted] (checkbox checked)

The selected staff members will then receive an email from EduKey that contains a randomly generated password. Once logged in, staff should create a new password from the [Account settings](#) cog in the top right hand corner of Provision Map.



The email template content is as follows:

Dear Example Teacher,

I have created an account for you at <https://edukeyapp.com/>. You can now login and view/edit learning plans and provisions for our school.

Your login details are as follows:

Username: example@edukey.co.uk
Password: ql126jr

To login please click on this link: <https://edukeyapp.com/>.

Kindest regards
Edukey Education Ltd on behalf of Mr School Admin
www.edukey.co.uk

Managing staff permissions

Individual staff members can be assigned different permission levels in Provision Map. To edit a staff member's permissions, click on the **three dots** in their row and select **Edit teacher** from the popup menu.

This will open the **Edit teacher** menu. Scroll down to the **Role** section and select a role option from the drop down menu. The four default roles are explained below::



Teacher: This role grants all user permissions except for admin rights and the ability to view confidential documents.

School admin: This role grants all user permissions.

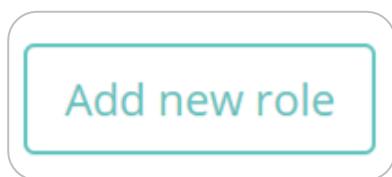
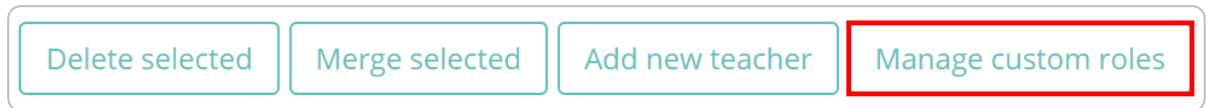
Read only: This role grants the user the ability to view plans, provisions, reports, finances and school robins.

Custom: This role allows a school admin user to tick the exact permissions that they would like the user to have, from the permissions list to the right of the staff details.

A screenshot of the 'Edit teacher' menu showing the 'PERMISSIONS' section. At the top, there is a horizontal list of permissions: 'View plans', 'Create/edit plans', 'Review plans', 'View passports', 'Create/edit passports', and 'View provisions'. Below this list is a grid of six columns, each containing a checkbox. The first column has a checked checkbox. The other five columns have empty checkboxes.

Creating custom staff roles

In addition to the four default roles available to staff, you can create custom roles with the permissions of your choice. You can check which custom roles are in place by clicking on the [Manage custom roles](#) button above the list of staff members.



To add a new custom role to the list of available roles, click on the [Add new role](#) button and give it a name.

The new role will be added to the custom roles list.

You can assign specific permissions to the role by [ticking the permissions checkboxes](#) to the right.

		Permissions	
		Role name	View plans Create/edit plans
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
<input type="checkbox"/>	Plan Access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The custom role will now appear as a selectable option in the [Role](#) drop down menu when editing a staff member's details.



Further support

Please do not hesitate to get in touch if you need more support or training. support@edukey.co.uk

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