



Now that you have received your training, you will next need to access your ScholarPack portal to set up your school details and configure settings, before then going on to provide the rest of your staff with their credentials ready to use ScholarPack as your School's new MIS!

Please complete all the steps below to ensure your ScholarPack portal is ready to be used by your School. If at any point you are unsure on where an area is within ScholarPack, all our training and support guides can be found in the 'Training & Onboarding' section within the ScholarPack Help Centre.

**This set up will take approx. 30-40 minutes.**

**\*\*If you received your Primary Contact credentials using our previous onboarding process (LastPass) and are yet to sign into your ScholarPack portal for the first time, please contact us at [onboarding@scholarpack.com](mailto:onboarding@scholarpack.com) \*\***

## **Step 1 - Accessing Your ScholarPack Portal**

Within **48 working hours** after your migration is complete, you will receive an email from us which will contain the URL (web address) to your ScholarPack portal, your username, links to our support guides and be advised you will shortly receive a call to provide you with your temporary password (**this will be sent to the main contact that we have been provided with**).

Once you are signed into ScholarPack for the first time, the first thing you will need to do is change your password from the temporary one that you have been provided. For security, we also advise you to change your password every 90 days, never save your password to your browser/device auto-fill and also never share your password with other members of staff.

To change your password: Select **Home>My Password**, enter your new password and click **Save**.

## Step 2 - Core Set-Up

To access this, please go to: **Admin > Config > Core Setup**

The Core Setup area contains setting options that control the core functionality of ScholarPack, for this set up you will be looking at 4 sections (School, Holidays, Years and Forms).

**'School'** is where you can record all of the school's information which is needed in order to send information to the LA (Local Authority) or DfE (Department of Education) as part of your census return. Once set, the majority of the data within this area will not need to be updated unless you need to make any changes. Any information that needs to be changed as part of the end of year process (e.g dates for the academic year) are changed when you complete your year end within ScholarPack.

Under the 'School Details' header within 'School', please click the **Edit** button to enter your details.

**Note:** If you are unsure about any of the information you are required to enter, please go to the official government website. Also, if you see that your LA, Estab, URN or school name is showing incorrectly within ScholarPack, please contact your support team.

This section will allow you to set the dates when the school will be closed e.g. Christmas, Easter, half terms, bank holidays and training/inset days. By entering in the school holidays accurately you will avoid any gaps in attendance.

You can enter a school holiday by using the 'Holiday' drop down box and selecting the appropriate holiday. Next you will need to enter the 'Start Date' and 'End Date' (weekdays) then click the **Add Holiday** button. **Note:** Please ensure to enter holidays for the entire academic year that you are currently in as well as the previous year, this will ensure your attendance data is correct for those periods.

This area allows you to enter the school's Academic year groups. This information is used throughout ScholarPack in areas such as generating registration forms, and assessment classes.

**Note:** When completing this section, please ensure to use the correct numeric value in the 'Academic Year' field, however, the 'Description' can be entered with whatever value you require (but no duplicates please!). These can be changed at any time by selecting the **Edit** button next to the year you wish to change.

Forms are usually registration (pastoral) groups but are sometimes named differently, depending upon each school's preferences. In ScholarPack, forms are your registration groups (these may be the same as your academic classes).

You will need to fill out the 'Abbreviation' and 'Description' fields and then click on the **Save New Form Group** button (each form will need to be entered separately). These can be changed at any time by selecting the **Edit** button next to the Form you wish to change. Please do not have any duplicates in the Abbreviation and Description column or your

reports will be affected. Each entry needs to be unique. If new Form names are required for the next academic year, please enter them as new Form names instead of editing the existing forms. **If your forms are in the incorrect order, please drag and drop these into place.**

**Note:** Getting ready for your year end? Your form set up will be slightly different, please see the 'Year End' documentation in the ScholarPack Help Centre.

### **Step 3 - Register Configuration**

Here you will be presented with the options to configure what you would like Teachers to see on the registers in **Home > Register**.

The **Edit** function will allow you to be able to select 'Yes' or 'No' for 'Meals', 'By Form', 'By Class', 'Show All Codes', 'Show Aspects', 'Show Notes', 'Show % Attendance', 'Clubs', 'Negative Register', 'Show Y Codes' and 'Show Remote Learning'. Once you have made your selections, please click **Update** to save any changes.

### **Step 4 - Tutors**

You can access this by either clicking **Configuration** at the top of the page to go back and then selecting **Tutors** or go to **Admin > Config > Tutors**

Once your Teachers are in ScholarPack you can assign them to the form they will be responsible for, to do this, click on the green **Assign** button and select Year and/or Form from the drop down boxes, once you have made your choice, click on **Update** to save.

You can assign a staff member to more than one form by clicking **Manage** and using the second set of drop downs below the current saved one. You can also have more than one teacher assigned to a form.

**Note:** If there are certain tutors not showing within this section, this would indicate that they do not have a username created or the teacher role assigned to them.

### **Step 5 - Security Settings**

You can access this by either clicking **Configuration** at the top of the page to go back and then selecting **Security Settings** or go to **Admin > Config > Security Settings**

Here you are able to change how long it will be for ScholarPack to automatically logout if left idle (this is set to 1 hour as default). To change this, click the **downward arrow** in the Hour and Minute fields and select your required amount in the drop down box. Once you have made your selection, please ensure to click **Save**.

**Note:** ScholarPack highly recommends that all users manually log out once they have completed their work - You can logout by going to **Home > Logout**

## **Step 6 - Ensure Your Attendance Is Up To Date**

The best way to check if you have any gaps within your register and also resolve these, is to use the report called 'Gaps in Register by Date' which will also guide you to the 'Manage Register' section if any gaps need filling (in bulk or individually). To access this, please go to **Reporting>Reports>Gaps in Register by Date**

For further information on how to use 'Manage Register' or the 'Gaps in Register by Date' report, please refer to the ScholarPack Help Centre.

**Note:** If you are not a member of the admin team, you may want to hold this step until after you have provided access to admin staff members to allow them to assist with this requirement.

## **Step 7 - Confirm Active Students and Staff**

### **Students:**

To confirm all of your students have migrated correctly, please use the 'Class Numbers' report, you can access this by going to **Reporting > Reports > Class Numbers**

**Note:** You may also need to check if your migrated off-roll pupils have a leaving date present. You can check this by going to **Admin>Students>Search Not On Roll**

### **Staff:**

To confirm all of your staff have migrated correctly, please use the staff 'Custom Report' report (green area); you can access this by going to **Reporting>Reports>Custom Report (Green)**. Once you have this report open, please ensure to tick the '**Active**' option on the filter selection, if any staff are showing as inactive when they shouldn't be, please go to the staff members profile to resolve this (Admin>Personnel>Staff). If you believe there may be some staff members missing, please try selecting the '**show inactive staff members**' option first, however, with some previous MIS systems, staff may not have been migrated if they were not entered correctly/details missing.

**If there are any issues with your migration, please contact the ScholarPack team at [onboarding@scholarpack.com](mailto:onboarding@scholarpack.com)**

## **Step 8 - Retrieving Your Staff Credentials**

We have already created your staff log in details and saved these as a printer friendly file within your ScholarPack portal in the '**Secure Upload**' section. Once you have downloaded these, you can print this out, cut out, and then provide these to your personnel ready for them to start using ScholarPack!

Your '**Secure Upload**' area can be accessed by going to **Admin>Secure Upload**, once there, click on the file name of the file you wish to download, it will then ask you to sign in again with your ScholarPack credentials, once you have done this you will see the file automatically download to your computer!

## **Step 9 - Assigning Access Roles to Staff**

When a login credential is created for a staff member, they will be assigned the 'Teacher' access role by default, this is because this role does not allow any data editing within ScholarPack. You will need to assign other roles to staff members who require different levels of access to the system, e.g. SENDCO, Admin Team, Teaching Assistants, etc.

**Note: Please also check that you have the correct roles assigned and change them if required.**

To change the role of a staff member, you will need to do this on their staff profile. To access a staff profile you can either search their name within the top right **search box**, or go to the staff profile section located in **Admin>Personnel>Staff** and selecting their name from the drop down box.

Once on the staff profile, select '**Change password/roles**' located under their ScholarPack Username on the left side of the profile. This will then open another page showing all available roles, once you have made your selection click '**Change**' to save. If you are unsure on what roles to select for a member of staff, you can click '**Download the ScholarPack User Role Definitions**' located on the left of the page which provides some further details on what access a role provides.

**Note:** There will be a username for every active member of staff, if there are some staff that do not require a login to ScholarPack, please delete this by going to their staff profile, selecting 'Change password/roles' and selecting '**Delete SP Login**'.

**When assigning roles, we recommend you have at least 2 members of staff assigned the 'sysadmin' role as this is the role that can change staff passwords if they are forgotten.**

- **Full Access Admin/SLT/Head** - Admin, Central Register Editor, Central Register Viewer, Senior Management Team, Human Resources, Student Admin and System Admin. (**Note:** If you have also purchased our Comms/Parents App module, you would also select Comms User, Parents App Inbox, Parents App Access Management and Parents App Configuration.)
- **Limited Access Admin** - Admin and if you would like them to be able to change passwords and roles for other staff members, you would also need to assign the System Admin role. (**Note:** the Admin role allows visibility of a staff profile, however, no contracts, confidential or absence information, the user would also require the HR role assigned to see this information).
- **SENCO/SENDSCO** - Teacher and SENCO
- **Teaching Assistant (Register Only)** - Teaching Assistant
- **Teaching Assistant (Register and Pupil Profile)** - Higher Level Teaching Assistant
- **CPO/DSO/DSL** - Teacher and Child Protection Officer

## Step 10 - API Configuration

The final step in this setup is to configure any links you have with 3rd party integrators (such as parent payment, safeguarding and assessment systems).

Depending on the system, they will have different requirements on what is needed to integrate, therefore, to assist, we have created a list of the most frequently used providers and how to integrate these with your ScholarPack MIS (search for ' Frequently Used API Integrations' within the ScholarPack Help Centre), however, **you should always speak to the provider of the service you wish to integrate to ensure that the integration is being processed correctly.**

