



ScholarOs

ONE SCHOOL. ONE OPERATING SYSTEM.

OPERATIONAL HANDBOOK · SEPTEMBER 2026

Roles, permissions & school workflows.

A detailed reference for leadership, implementation owners, department heads, and technical teams evaluating how ScholarOs works end to end.

Coverage

People, records & approvals

Purpose

Evaluation and implementation

Principle

Least privilege by default

HOW ACCESS IS DECIDED

Four controls shape every user experience

ScholarOs does not present one universal menu. The application composes the workspace from identity, tenant, role, and subscribed features.

01

Identity

Authenticated named user

02

Tenant

School code and school scope

03

Role

Permitted responsibilities

04

Plan

Enabled product capabilities

Capability	Super Admin	Principal	Deputy	Teacher	Staff	Parent	Student
Platform tenants & plans	Manage	—	—	—	—	—	—
School settings & users	Platform only	Manage	Delegated	Own context	Own context	Own account	Own account
Students & parents	—	Manage	Manage	View assigned	Operational	Linked only	Self only
Attendance	—	Oversee	Oversee	Record/view	As assigned	Linked view	Self view
Grades & results	—	Approve/report	Review	Enter/view	Restricted	Linked view	Self view
Fees & finance	Plan catalogue only	Oversee	Summary	Restricted	As assigned	Linked view	Restricted
Messages & events	—	Manage	Manage	Participate	Participate	Receive/use	Receive/use
Technical settings	Platform	Authorized	Restricted	—	—	—	—

Evaluation note: “Manage,” “view,” and “restricted” summarize the intended operating model. Final permissions should be validated against the contracted plan and the school’s delegation policy during implementation.

RESPONSIBILITIES

Seven roles, two administrative planes

The platform plane manages the ScholarOs service. The tenant plane runs an individual school. Keeping these separate avoids mixing vendor administration with school operations.

Super Admin · platform plane

Operates the multi-tenant service: tenant list, plan distribution, indicative catalogue value, account activity, platform health, leads, users, and testimonials.

This role must select a tenant explicitly before using school routes and is not an ordinary teaching or school-finance account.

Principal · tenant plane

Highest school-level operator. Oversees configuration, users, students, academics, finance, reports, admissions, discipline, communication, and approvals.

Deputy

Supports school-wide academic and operational leadership. Typical emphasis: attendance, results review, timetable, events, teachers, discipline, and delegated oversight.

Teacher

Works with assigned classes and subjects: attendance, lesson schedule views, assignments, quizzes, grades, results, timetable, and learner progress.

Staff

Supports administrative or departmental operations. Access should match function—for example finance, front office, inventory, communication, or duty coordination.

Parent

Uses relationship-scoped access to follow linked learners, fee information, results, messages, events, and school announcements on eligible plans.

Student

Uses self-scoped access for results, timetable, assignments, quizzes, events, messages, and learning activities on eligible plans.

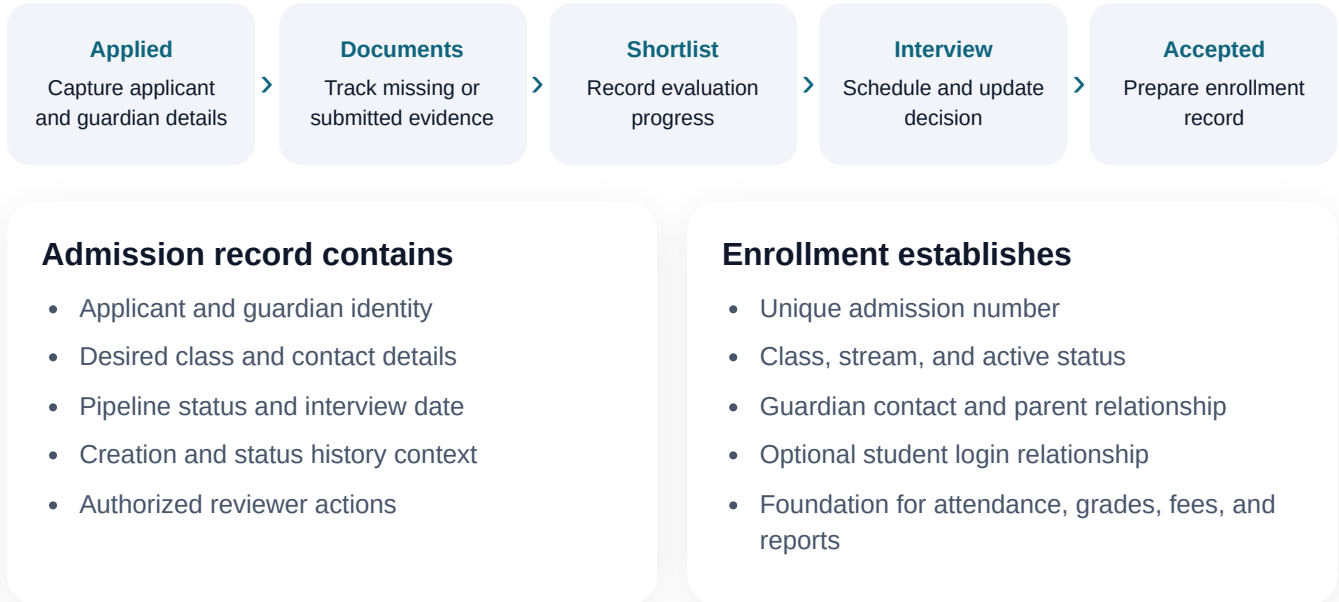
Internal technical team

Not a broad business role. Technical access should use named accounts and only be granted for approved configuration, SSO, API, deployment, monitoring, or support tasks.

ADMISSIONS TO ACTIVE RECORD

Turn an applicant into a governed learner record

Admissions and student management are connected but distinct. The pipeline tracks a prospective learner; enrollment establishes the operational record and account relationships.



Core operating logic

Rule	Why it matters	Owner
Admission number is unique within the school	Prevents ambiguous learner records and document errors	Registrar / authorized administrator
Parent and student accounts are linked, not inferred by name	Supports relationship-scoped portal access	School administrator
Status changes are explicit	Separates active, inactive, transferred, or historical records	Leadership / registrar
All records remain tenant-scoped	Prevents one school from operating on another school's learner data	System control

PLAN · TEACH · ASSESS · REPORT

Academic records move through controlled stages

ScholarOs supports both daily teaching workflows and formal reporting. Leadership retains visibility while teachers work in their assigned academic context.

Structure	Configure academic year, term, grading model, classes, subjects, teachers, and relationships.
Schedule	Create timetable slots and events, then manage examinations, assignments, and quizzes in their role-scoped views.
Capture	Teachers record marks, maximum scores, remarks, assessment context, and grading date.
Review	Check missing subjects, unexpected values, learner mapping, and reporting completeness.
Approve	Authorized leadership explicitly approves formal grades/results where approval applies.
Publish	Generate learner results and report cards; expose appropriate views to portals.

Assignment logic

The assignment view presents class assessments from the quiz module, including publication state, question count, time limit, and points.

Quiz logic

Teacher creates questions, answer options, correct answers, points, time limit, and publication state.

Grade logic

Score and maximum score produce comparable evidence; remarks and approval add professional context.

Academic quality controls

- ✓ Use one agreed grading configuration for the reporting period.
- ✓ Complete class, subject, teacher, and learner mappings before capture.
- ✓ Validate outliers and missing records before approval.
- ✓ Restrict re-opening or editing published outcomes to authorized personnel.
- ✓ Archive or close reporting periods according to school policy.

DAILY OPERATING RHYTHM

Make presence, time, and responsibility visible

Attendance records connect a learner, date, class, status, and recorder. Scheduling modules coordinate where people should be and what should happen.

Attendance cycle

1. Select the date and authorized class context.
2. Load learners from the school's active records.
3. Mark present, absent, or late.
4. Save the recorder and timestamp context.
5. Review exceptions and follow up.
6. Use summaries in leadership reporting.

Scheduling cycle

1. Define subjects, teachers, classes, and rooms.
2. Create timetable day/start/end allocations.
3. Add events and term milestones.
4. Assign staff duties with date, place, and status.
5. Publish the relevant view to each role.
6. Update changes from one controlled source.

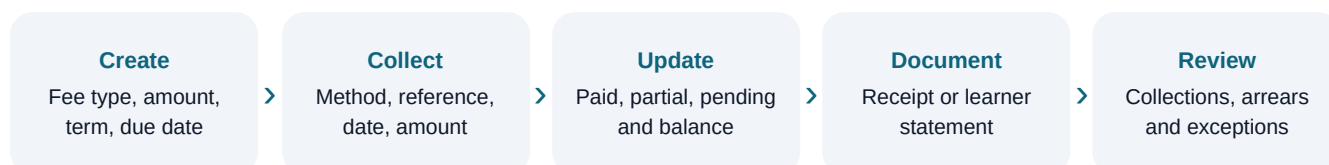
Record	Minimum useful context	Primary users	Management use
Attendance	Learner, class, date, status, recorder	Teacher, deputy	Absence patterns and intervention
Timetable	Day, class, subject, teacher, start/end, room	All school roles	Conflict reduction and accountability
Calendar event	Title, category, dates, audience, venue	School community	Shared operational awareness
Duty roster	Assignee, duty, date, time, place, status	Staff and leaders	Coverage and follow-up
Lesson schedule	Teacher, class, subject, period and room	Teachers and academics	Teaching allocation visibility

Data-quality principle: record attendance as close to the actual session as possible. Late bulk entry weakens intervention value even when totals eventually look complete.

OBLIGATION TO EVIDENCE

Every balance should be explainable

Fee management attaches an obligation and its payment state to a learner and reporting period. Documents turn that operational record into something a family or auditor can understand.



Record controls

- ✓ Fee is linked to the correct learner and term.
- ✓ Amount paid never silently replaces the original obligation.
- ✓ Payment method and reference are retained when available.
- ✓ Status follows the actual amount position.
- ✓ Receipts and statements are generated from recorded data.

Separation of duties

- Collection may be performed by finance staff.
- Adjustments should require an authorized process.
- Leadership should review collections and exceptions.
- Technical teams should not alter financial records directly.
- Gateway settlements still require reconciliation.

Document set

Document / view	Purpose	Typical recipient	Control check
Receipt	Evidence of a recorded payment	Parent / payer	Reference, amount, date, learner
Statement	Explains obligations, payments, and balance	Parent / finance	Period and opening/closing position
Collections view	Operational monitoring of receipts	Bursar / principal	Method totals and exceptions
Finance summary	Leadership-level position	Leadership / board	Source period and completeness

BEYOND THE CLASSROOM

Coordinate communication and school operations

Operational modules keep important context in the same governed workspace used for people, schedules, and reporting.

Inquiries

Record school inquiries with subject, department, learner context, contact details, status, and priority.

Broadcasts

Prepare in-app or configured SMTP email communication for parent/class audiences and retain delivery outcomes.

Notifications

Deliver user-scoped in-app notices and payment confirmations without exposing another tenant's recipients.

Discipline

Record incident date, category, severity, description, reporter, status, parent notification, and action context.

Inventory

Track item, category, serial/reference, quantity, location, and current operational status.

Audit records

Retain tenant-scoped evidence of mutating API requests, actor, outcome, status, duration, and time.

Duty roster

Assign responsibilities by person, date, time, location, and completion state.

API keys

Issue, identify, revoke, and delete tenant integration keys for read-only API access on eligible plans; writes require a user session.

Testimonials

Capture, review, approve, and publish selected community feedback without bypassing moderation.

The professional standard is simple: operational events are recorded once, by an accountable user, at the point where they can still inform action.

INTERNAL IT PARTICIPATION

Give the technical team a clear boundary

A school with internal IT can participate in identity, integrations, deployment, monitoring, and support. Business records should remain owned by the responsible school departments.

Area	School process owner	Technical team	ScholarOs / implementation
Users & role approvals	Approves joiner/mover/leaver access	Assists provisioning	Provides role model and configuration
Academic configuration	Owns terms, grading, classes, approvals	Supports import/templates	Configures agreed workflow
Finance data	Owns fees, payments, adjustments	Supports gateways; no direct alteration	Implements product controls
Google SSO	Approves identity policy and domains	Owns Google OAuth configuration and approved domains	Configures eligible-plan integration
API access	Approves use case and data scope	Secures keys, client code, rotation	Provides eligible endpoints and guidance
Self-hosting	Accepts operational responsibility	Runs platform, database, backups, TLS, monitoring	Handover depends on purchased licence
Support	Owns user triage	Captures technical evidence	Resolves product issues per agreement

Minimum technical controls

- ✓ Named administrator accounts and MFA where available
- ✓ Password, access review, and offboarding procedure
- ✓ Secrets stored outside source code
- ✓ TLS for production traffic
- ✓ Database backup and restore testing
- ✓ Monitoring, logs, patching, and incident contacts

Launch acceptance evidence

- ✓ Role-by-role login and navigation checks
- ✓ Tenant isolation and sample-record validation
- ✓ Academic and finance totals reconciled
- ✓ Document generation tested
- ✓ Integration test results retained
- ✓ Rollback, support, and ownership agreed

END-TO-END ACCEPTANCE

Prove the important journeys before launch

Acceptance should test outcomes, permissions, data quality, and recovery—not just whether a page opens.

Identity & tenancy

- ✓ Each role can sign in with the correct school code.
- ✓ Inactive or invalid accounts are rejected.
- ✓ Users see only permitted navigation.
- ✓ Tenant records do not leak across schools.

Student lifecycle

- ✓ Applicant can progress through agreed statuses.
- ✓ Enrolled learner has unique identity and relationships.
- ✓ Parent/student portal scope is correct.
- ✓ Search and detail views agree.

Academic cycle

- ✓ Teacher records attendance and grades.
- ✓ Leadership reviews and approves results.
- ✓ Report cards match source records.
- ✓ Published views respect the audience.

Finance cycle

- ✓ Obligation, payment, balance, and status reconcile.
- ✓ Receipt and statement are printable.
- ✓ Payment reference and method are retained.
- ✓ Adjustments follow authorization.

Communication & operations

- ✓ Audience targeting is correct.
- ✓ Provider delivery configuration is verified.
- ✓ Events, duties, inventory, and incidents save correctly.
- ✓ Required reports can be exported or printed.

Production readiness

- ✓ Environment, TLS, secrets, and domain are correct.
- ✓ Backup/restore and monitoring are verified.
- ✓ Owners and escalation contacts are published.
- ✓ Training and launch communications are complete.

Acceptance principle

A launch is ready when authorized users can complete their real work, the resulting records reconcile, and the school knows who owns each operational and technical responsibility.