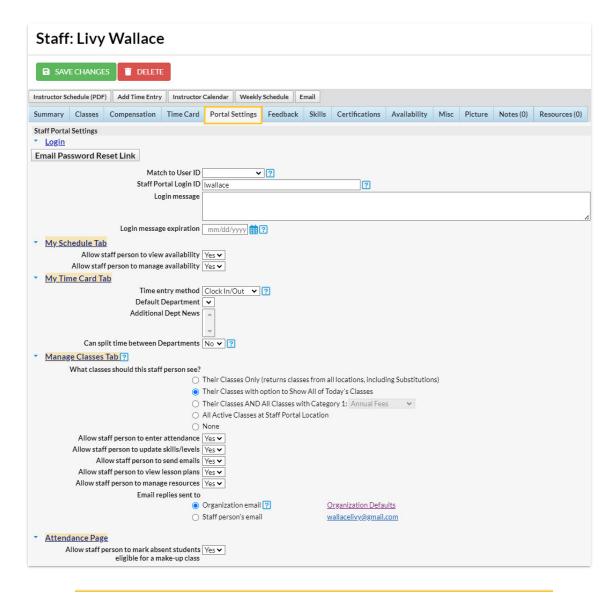
Staff Portal Setup Step 4 - Staff Settings

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There are two groups of settings you can customize that affect your staff's use of the Staff Portal.

- Settings that are applied to your database as a whole and affectALL staff (see Step 1: Staff Portal Settings).
- Settings that are applied to **INDIVIDUAL** staff on the *Portal Settings* tab of their *Staff* record. This step applies to these individual settings:



Staff Settings

Step 4 of the Staff Portal Setup deals with the individual staff settings and gives you the option to set up or edit these settings for your staff in mass (as opposed to going to each *Staff* record > *Portal Settings* tab individually).

1. Select the **box(es)** next to the staff name(s) whose Staff Portal Settings you want to set up or edit. Click the **Check All** button if the changes will apply to all staff listed. Use the **Uncheck All** button

to reset.

- 2. In the My Schedule Tab section, define whether you want the staff to be able to view and manage their availability in the Staff Portal or only view it.
- 3. Make the selections in the *My Time Card Tab* section for the settings that you want to change. If a setting does not need to be changed leave the drop-down as *No Change*. These settings are covered in detail in the *Time Clock* section, under **The Staff Portal**.
- 4. Make the selections in the *Manage Classes Tab* and *Attendance Page* sections for the settings that you want to change.
 - If a setting does not need to be changed leave the drop-down as No Change. These settings are covered in detail in the Attendance section, under Attendance Settings.
- 5. Click **Save** and **OK** in the confirmation window.
- 6. Click Go To Step 5: Send Portal Login Email→ to advance to the final setup step. SeeStaff Portal Setup Step 5 Send Portal Login Email, or you can leave the setup and continue at a later time.

In the example below, **Livy Wallace** will have her **Time entry method** changed to *Clock In/Out* (from *Manual In/Out* - see above image) and the **Manage Classes Tab** will now show *All Active Classes at Staff Portal Location* (from *Their Classes Only* - see above image). All other settings will remain the same (*No Change*).

