

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 affect **ALL 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: Livy Wallace

Instructor Schedule (PDF) Add Time Entry Instructor Calendar Weekly Schedule Email

Summary Classes Compensation Time Card **Portal Settings** Feedback Skills Certifications Availability Misc Picture Notes (0) Resources (0)

Staff Portal Settings

[Login](#)

Email Password Reset Link

Match to User ID ?

Staff Portal Login ID ?

Login message

Login message expiration ?

My Schedule Tab

Allow staff person to view availability ?

Allow staff person to manage availability ?

My Time Card Tab

Time entry method ?

Default Department

Additional Dept News

Can split time between Departments ?

Manage Classes Tab ?

What classes should this staff person see?

Their Classes Only (returns classes from all locations, including Substitutions)

Their Classes with option to Show All of Today's Classes

Their Classes AND All Classes with Category 1:

All Active Classes at Staff Portal Location

None

Allow staff person to enter attendance ?

Allow staff person to update skills/levels ?

Allow staff person to send emails ?

Allow staff person to view lesson plans ?

Allow staff person to manage resources ?

Email replies sent to

Organization email ? [Organization Defaults](#)

Staff person's email wallacelivy@gmail.com

Attendance Page

Allow staff person to mark absent students eligible for a make-up class ?

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. See [Staff 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*).

Edit All Staff Portal Settings

← RETURN

SAVE

SEND PORTAL LOGIN EMAILS →



1. Select the Staff to edit their settings below.

Check All Uncheck All

Dianne Harris

John Linton

Livy Wallace

2. Select the Settings

My Schedule Tab

Allow staff person to view availability

Allow staff person to manage availability

My Time Card Tab

Time entry method ?

Default Department

Additional Dept News

Can split time between Departments ?

Manage Classes Tab ?

What classes should this staff person see?

- No Change
- Their Classes Only (returns classes from all locations, including Substitutions)
- Their Classes with option to Show All of Today's Classes
- Their Classes AND All Classes with Category 1:
- All Active Classes at Staff Portal Location
- None

Allow staff person to enter attendance

Allow staff person to update skills/levels

Allow staff person to send emails

Allow staff person to view lesson plans

Allow staff person to manage resources

Attendance Page

Allow staff person to mark absent students eligible for a make-up class

SAVE

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