

General Staff Portal Settings

Last Modified on 01/06/2022 7:53 am EST

There are several general settings that affect the Staff Portal as a whole. These settings are edited from the *Staff (menu) > Staff Portal > Portal Settings*.

Staff Session Timeout Limit

Select a duration of time (between 5 min and 3 hours) after which your staff will be logged out of the Portal if they have not been active.

Staff Portal Settings									
Staff Session Timeout Limit	10 Mins ▼ (staff will be logged out automatically after this amount of time without activity)								
Features	What features do you want to use? ? <table border="1"><tbody><tr><td>Attendance <input checked="" type="checkbox"/></td><td>Allow Remote Attendance Yes ▼</td></tr><tr><td>Skills/Levels <input checked="" type="checkbox"/></td><td>Allow Remote Skills/Levels Yes ▼</td></tr><tr><td>Time Clock <input checked="" type="checkbox"/></td><td>Allow Remote Time Clock Yes ▼</td></tr><tr><td>Lesson Plans <input checked="" type="checkbox"/></td><td>Allow Remote Lesson Plans Yes ▼</td></tr></tbody></table>	Attendance <input checked="" type="checkbox"/>	Allow Remote Attendance Yes ▼	Skills/Levels <input checked="" type="checkbox"/>	Allow Remote Skills/Levels Yes ▼	Time Clock <input checked="" type="checkbox"/>	Allow Remote Time Clock Yes ▼	Lesson Plans <input checked="" type="checkbox"/>	Allow Remote Lesson Plans Yes ▼
Attendance <input checked="" type="checkbox"/>	Allow Remote Attendance Yes ▼								
Skills/Levels <input checked="" type="checkbox"/>	Allow Remote Skills/Levels Yes ▼								
Time Clock <input checked="" type="checkbox"/>	Allow Remote Time Clock Yes ▼								
Lesson Plans <input checked="" type="checkbox"/>	Allow Remote Lesson Plans Yes ▼								

Features

Choose which Portal features you want to use. Select the *Attendance*, *Skills/Levels*, *Time Clock* and/or *Lesson Plans* feature by adding a check mark to the corresponding box.

When the Staff Portal is **launched remotely (through a URL)** as opposed to from within your database (*Staff menu > Staff Portal > Launch Staff Portal*) staff are automatically able to:

- See all News (My News, Department News, and Staff News)
- View and print their schedule of classes and events
- View details of their classes (no information on enrolled students or contact information)
- Email the contacts of enrolled students (if their individual Staff Portal Settings allow them to send emails)

To allow staff to update information for a feature in the Portal when it has been launched remotely set **Allow Remote (feature name)** to **Yes** (the default is No).

For example, to allow a staff person to not only view and print their schedules, but also enter their time when they are accessing the Portal remotely, set *Allow Remote Time Clock* to *Yes*.

Remote access is covered in more detail in the [Launch the Staff Portal](#) topic.

Family & Student Display Options

Use this section to customize the information that is displayed in the Staff Portal on the *Student List Page* and on the *Additional Info* page (accessed using the *Details* link).

Student List Page

Family & Student Display Options:	Which information do you want displayed in the staff portal?
Student List Page	1 Age/Gender/Birthdate <input checked="" type="checkbox"/>
	2 Family Balance <input checked="" type="checkbox"/> Or Class Balance (overrides Family Bal) Yes ▾
	3 Future Drop Date <input checked="" type="checkbox"/>
	4 Primary Contact <input checked="" type="checkbox"/>
	5 Photo <input checked="" type="checkbox"/>

Attendance
News
My Schedule
My Time Card
Manage Classes
Clock-In
Actions™


← Return
✓ Save
✎ All Present
✎ All Absent
↺ Undo

Monday, Jan 3 2022

> Class Ballet - Int - Monday

★ Skills/Levels →
✉ Email →
📺 Virtual Class →
🔗 Resources →

Students 3 enrolled, 0 makeups Student List Page



5

Barbie Ager

FIRST DAY!

Balance: 100.00 2

10 yrs, Female, 11/17/2011 1

Holly Ager (999) 999-2415 4

Future Drop 03/31/2022 3

Barbie is the class helper for the month of January. 6 (Roll Notes - see below)

ATTENDANCE | SEND EMAIL | DETAILS 6

Present ▾

Absent ▾

Indicates there is medical information for the student.

Because the *Class Balance* option was selected, this amount represents the total fees due that are associated to this class as opposed to the family's account balance which may be different.

The **Details** link opens to the *Additional Info*.

Additional Info Page

Family & Student Display Options:	Which information do you want displayed in the staff portal?
Show Additional Info	6 Roll Notes <input checked="" type="checkbox"/> Editable <input type="text"/>
	7 Primary Contacts <input checked="" type="checkbox"/>
	8 Emergency Contacts <input checked="" type="checkbox"/>
	9 Family Address <input checked="" type="checkbox"/>
	10 Grade Level <input checked="" type="checkbox"/>
	11 Allergies/Special Needs <input checked="" type="checkbox"/>
	12 Medications <input checked="" type="checkbox"/>
	13 Disabilities <input checked="" type="checkbox"/>
	14 Immunization fields <input checked="" type="checkbox"/>

Additional Info

Barbie Ager

10 4th grade // 1105 Holly Lane, Cornelius, NC 28031 9

Roll Notes 6

Barbie is the class helper for the month of January.

✔ Save

PRIMARY CONTACTS 7

Holly Ager
 Email
hollyager41@gmail.com
 Cell
 (999) 999-2415

EMERGENCY CONTACTS 8

Dianne Ager (Grandmother) 999 999 3300

MEDICAL

Allergies 11
 Wasp bites

Special Needs 11
 Must be in the front of the class to be able to read the instructor's lips.

Medications 12
 EpiPen

Disabilities 13
 Partial hearing loss (inability to hear from left ear)

Immunizations 14
 Yes. Has double COVID vaccination (last dose 11/2021)



Setting the right Staff Portal permissions for your Users is very important! Click this link to review the [Staff Portal User Permission Requirements](#).