Settings for Staff Portal Skills/Levels

There are several settings that affect how your staff uses the Staff Portal for Skills/Levels and control what they are able to see and do.

Some of these settings are at the organization level and affect all staff (global) while others can be set at the individual staff level.

Organization Settings (Global - affect all staff)

These settings are global and apply to all staff. Edit these settings from the *Staff (menu)> Staff Portal > Portal Settings.*

Features

To use the Skills/Levels feature of the Staff Portal check **Skills/Levels** in the *Features* section and **Save Changes**.

Remote Access

You have the choice to allow staff to manage their classes through the Staff Portal both on-site and remotely. The Staff Portal is always available at your facility when you or another User has launched it from within Jackrabbit (see **Launch the Staff Portal from within Jackrabbit**). It is an optional setting to also have it available remotely (off-site). You can turn on remote access and the Staff Portal URL link can then be placed on your website for staff to log in from their home, smartphone, tablet, etc. in a mobile-friendly environment.

To allow remote access:

1. Go to the **Staff** (menu)> **Staff Portal** > **Portal Settings**.
2. Set **Allow Remote Skills/Levels** to *Yes* in the *Features* section.
3. Click **Save Changes**.
4. Provide a link on your website for staff to access the Staff Portal launch page. See **Use a Link to Launch the Staff Portal Remotely** for full instructions.

Skills/Levels Options

In this section, you determine which skills to display (assigned to classes or students) and whether skill/level progress emails are sent when updates are made to skills/levels.

Skills/Level Options

Choose which skills to display in the Staff Portal:

- **Display skills assigned to classes** - Select this option when you have skills added to classes.
- **Display skills assigned to students** - Select this option when you add skills to students.

Email Skill/Level Progress Options

Never send emails	No skill/level progress emails will be automatically sent for skills/levels updates. No pop-up window will display to give the staff person the option to email. ***Note:*** *If the staff person can send emails in the Staff Portal they can opt to use the email icon to generate an email for any exceptions.*
Staff option to send email	No skill/level progress emails will be automatically sent for skills/levels updates. A pop-up window will give the staff person the option to send the email. ***Note:*** The staff person must have *Allow this staff person to send emails?* set to *Yes* on the *Portal Settings* tab of their *Staff* record in order to have the option to send a skill/level progress email.
Automatically send email	Skill/Level progress emails are automatically sent for skills/levels updates regardless of whether the staff person is enabled to send emails in the Staff Portal or not. ***Note:*** *For the skill/level status* Testing *no email is sent. This is because a student may test several times before attaining a skill. If the staff person is enabled to send emails in the Staff Portal they can opt to use the email icon to generate an email for any exceptions.*

You can also customize the email by selecting from the following options:

- **Include Skill/Level Notes** - When set to *Yes*, notes will be included in the email.
- **Include Class Location** - When your classes are offered at different locations, include the class location.
- **Header** - Add header text to the email.
- **Footer** - Add footer text to the email.

Staff Settings (Individual)

On the *Portal Settings* tab of the *Staff* record, there are a few settings that affect what that specific staff person is able to do in the Staff Portal in terms of class management. They are found in the *Manage Classes Tab* section.

Manage Classes Tab

What classes should this staff person see?

This setting allows you to select the classes shown in the Staff Portal when the staff person logs in.

Their Classes Only	The staff person will see the classes they are assigned as an instructor or substitute at all Locations.
Their Classes with option to Show All of Today's Classes	The staff person will see the classes they are assigned as an instructor or substitute at all Locations, with an option to show all classes for that day at the Location the Staff Portal has been launched for.
Their Classes AND All Classes with Category 1	The staff person will see the classes at all Locations to which they are assigned as an instructor or substitute or that have a specified Category 1. This is helpful for staff who enter attendance for all classes of the same Category 1, even though the staff person isn't assigned as an instructor for each class.
All Active Classes at Staff Portal Location	The staff person will see all classes at the Location the Staff Portal has been launched for. This is helpful for staff who aren't assigned as an instructor for classes but enter attendance for all classes (for example, gym floor manager or swim deck manager).
None	No classes will be shown for this staff person.

Allow staff person to enter attendance

Set to *Yes* to allow the staff member to take attendance in the Staff Portal.

Allow staff person to update skills/levels

To enable a staff person to edit skills/levels in the staff portal set **Allow this staff person to update skills/levels?** to *Yes*. When set to *No*, the staff person will not have access to the skills/levels information in their Staff Portal.

Allow staff person to send emails

This must be set to *Yes* for an instructor to be able to send emails from the Staff Portal. If *Staff option to send email* is selected in your Skill/Level Options, the *Allow staff person to send emails* setting will affect their ability to generate a skills/levels progress email.

When an email is sent from the Staff Portal, you can choose who will get the reply.

- Select **Organization email** if you want all replies to be sent to the organization email listed in your **Notification Settings**.
- Select **Staff person's email** if you want replies to be sent to the staff person who sent the email. This option is only available if the staff person has an email address listed on the *Summary* tab of their *Staff* record.

> If you don't see the option to send replies to the staff person's email, check the Summary tab of their Staff record to make sure there is an email address for them.

Allow staff person to view lesson plans

Set to *Yes* for an instructor to be able to view existing lesson plans for classes in the Staff Portal. Lesson plans can be found under *Manage Classes* in the Staff Portal. See **Lesson Plans - An Overview** for more details about adding lesson plans to classes.

Allow staff person to manage resources

Set to *Yes* for an instructor to be able to add, edit, and delete resources in the Staff Portal. See **Resources in Jackrabbit** for more details.

Attendance Page

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

When your system is set to track absences, the **Allow this staff person to mark absent students eligible for a make-up class** setting determines whether or not

the staff person marking the student absent is permitted to allow a makeup for the absence.