Staff Availability in the Staff Portal

Knowing when staff is available to work and when they need time off is important for scheduling classes and finding substitutes. By tracking **Staff Availability in Jackrabbit**, you can see at a glance who is available and who isn't on the Daily Calendar, simplifying your planning.

Increase efficiency by allowing staff to communicate their availability to office administrators through their Staff Portal. Entering their own hours of availability and time off in the Staff Portal ensures there are fewer errors and more timely updates.

Expand/Collapse All

Settings for Staff Availability in the Staff Portal

Once you have customized your general**Staff Availability settings** (**Gear** icon > **Settings** > **General** > **Organization Defaults**), you will need to give your staff access to their availability in the Staff Portal.

The options are:

Allow staff person to view availability	Set this to Yes to allow them to view their available time and time off.
Allow staff person to manage availability	In order for this to be set to Yes, the staff member must already have the ability to view their availability (above). This setting allows them to add, edit, and delete their availability and time off (i.e., manage availability).

Manage Settings for Individual Staff

The Staff Availability settings for the Staff Portal can be managed at the individual staff level from the **Staff** record > **Portal Settings** tab > **My Schedule Tab** section.

Note: If a staff member is set to only be able to view their availability but not manage it, they will not see the manage options above their schedule cards (availability and time off).

Manage Settings for Multiple Staff at Once

To work with the Staff Availability Staff Portal settings for multiple staff at once:

1. Go to the **Staff** menu > **Staff Portal** > **Edit All Staff Settings.**
2. Check the boxes next to the names of the staff 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.
3. In the *My Schedule Tab* section, define whether the selected staff will be able to view **and** manage their availability in the Staff Portal, or if they should only be able to view it. **Save** your changes.

View and Manage Availability in the Staff Portal

Availability is managed from the **My Schedule** page of the Staff Portal.

1. Log in to the Staff Portal and open the menu (if you are working on a larger screen, go to the My Schedule tab).
2. Select **My Schedule**.
3. Click the **View Availability** button.

On the *My Schedule > Manage Availability* page you will see schedule cards displaying scheduled availability and time off.

When you have access to manage availability, you will also see:

Add Availability (*button*)	Use the **Add Availability** button to open the *Add Availability* window.
	
	1. Enter the date, in the **From** date field, the availability will take effect. Select **Same Day Entry** to add the From date into the To date field.
	    ○ Optionally, add a **To** date that is the last day of the period the availability applies to. TIP: If no end date applies and the availability is indefinite, leave the **To** date blank.
	2. Enter the times you can start work and when you need to be finished.
	    ○ Use **Copy to All** to add the start and end times to all other days.
	    ○ If you are available for a split shift, use the button to add another time block for the day.
	    ○ Use the button to delete additional time blocks.
	    ○ Hover over a *From* or *To* field and use the button to delete the entry.
	3. Add a comment (max 500 characters) if you choose. Within Jackrabbit, this comment can be viewed from the schedule card in the *Staff* record > *Availability* tab using the **View Comment** link. It will also display on the *Daily Calendar* when a User hovers over the time block.
	4. **Save** your changes. A schedule card is added to the *Manage Availability* page. Use the **Edit** and **Delete** links to manage the availability.

Add Time Off (*button*)	Use the **Add Time Off** button to open the *Add Time Off* window.
	
	1. Enter the date, in the **From** date field, time off starts. Select **Same Day Entry** to add the From date in the To date field.
	2. Enter the last day of the date range, in the **To** date field, in which the time off is scheduled.
	3. Enter the times and days of the week you need off.
	   ○ Use **Copy to All** to add the start and end times to all other days.
	   ○ Use the button to add another time block for the day if needed.
	   ○ Use the button to delete additional time blocks.
	   ○ Hover over a *From* or *To* field and use the button to delete the entry.
	4. Add a comment (max 500 characters) if you choose. Within Jackrabbit, this comment can be viewed from the schedule card in the *Staff* record > *Availability* tab using the **View Comment** link. It will also display on the *Daily Calendar* when a User hovers over the time block.
	5. **Save** your changes. A schedule card is added to the *Manage Your Availability* page. Use the **Edit** and **Delete** links to manage the time off.
	
	   When a Time Off entry is created, edited, or deleted, a corresponding Substitute record is created, edited, or deleted. Learn more about the **Substitutes feature**.

Edit (*link in schedule card*)	Opens the availability or time off modal where you can edit the individual time blocks in the schedule card or delete all of them.
View Comment (*link in schedule card*)	Allows you to see any comments that were added when the availability or time off was scheduled.
Delete (*link in the schedule card*)	Deletes all of the time entries in the schedule card.
Export/Print	Use the **Export/Print** icon to select **Print** or **Export to Excel** all the availability information on the page.

Keep Track of Availability Changes Made in the Staff Portal

It's important to know when staff have made changes to their availability through their Staff Portals. There are a couple of ways to monitor this activity.

Staff Availability Notifications

Whenever a staff member makes changes to their Availability or Time Off through their Staff Portal, you can opt to have a notification email sent to a specific email address with the details of any changes made.

Go to the *Gear* icon > *Settings* > *General* and scroll down to the *Staff Availability Settings* section. Select the **Yes** radio button to turn on the notification emails. The email address defaults to your organization's email address (*Gear* icon > *Account* > *My Account* > *Organizational Defaults*) but can be changed if needed.

User Activity

All activity in the Staff Portal is captured in User activity and you can run a report on that activity to see what changes were made to your staff's availability.

Use **Search User Activity** to generate the report:

1. Go to **Reports** (menu) > **Find Reports.**
2. Enter *User Activity* in the Keyword Search and click the magnifying glass to search.
3. **Search User Activity** will display with a link to take you there.

All User activity is logged and can be searched, the trick is in knowing how to sift through it all!

Each action a User takes creates an *Event* in the log. Each time that action is in the Staff Portal, the Event will include the term *Staff Portal* in the Event description.

To narrow the report to only activity in the Staff Portal, enter that term in the *Event* criteria field. The report that is generated gives a detailed description of the changes made.