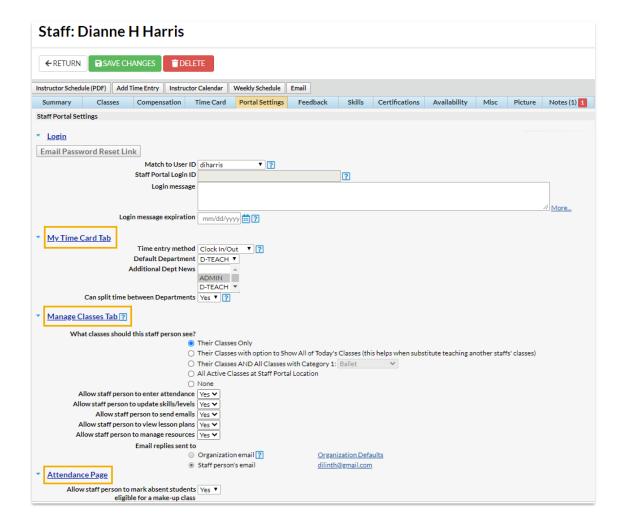
Staff Portal Setup Step 4 - Customize Staff Settings

Last Modified on 11/03/2020 12:30 am EST

After sending the portal login email (Staff Portal Setup Step 3) to your staff members, you can set up and or edit staff settings.

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

- Settings that are applied to your database as a whole and affectALL staff (See Staff Portal Settings).
- Settings that are applied to INDIVIDUAL staff on the Portal Settings tab of their Staff record:



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).

- Select the box(es) next to the staff name(s) whose Staff Portal Settings you want to setup or edit.
 Click the Check All button if the changes will apply to all staff listed. Use the Uncheck All button to reset.
- 2. 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 **Staff Settings**.
- 3. 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**.
- 4. SAVE and click OK in the confirmation window.
 Note: You can opt to leave the setup and continue at a later time or clickGO TO STEP 5: STAFF
 PORTAL SETTINGS → to advance to the final setup step. SeeStaff Portal Setup Step 5 Customize Staff Portal Settings.

In the example below, Dianne Harris will have her Time entry method changed to Manual In/Out (from Clock 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).

