Staff Portal Setup Step 4 - Customize Staff Settings

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 affect**ALL 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).

1. 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 click **GO TO STEP 5: STAFF PORTAL SETTINGS →** to advance to the final setup step. See **Staff 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*).

Staff Portal Guided Setup - Step 4 of 5: Staff Settings

SAVE | GO TO STEP 5: STAFF PORTAL SETTINGS →

1. Select the Staff to edit their settings below.

Check All | Uncheck All

☐ Stephanie Andrews   ☐ John Linton   ☑ Dianne Harris

2. Select the Settings

My Time Card Tab

Time entry method [Manual In/Out ▼] [?]

Default Department [No Change ▼]

Additional Dept News
[No Change
Delete Existing
ADMIN
D-TEACH
FRTDSK]

Can split time between [No Change ▼] [?]
Departments

Manage Classes Tab [?]

What classes should this
staff person see?

○ No Change

○ Their Classes Only

○ Their Classes with option to Show All of Today's Classes (this helps when substitute teaching
another staffs' classes)

○ Their Classes AND All Classes with Category 1: [No Change ▼]

⦿ All Active Classes at Staff Portal Location

○ None

Allow staff person to [No Change ▼]
enter attendance

Allow staff person to [No Change ▼]
update skills/levels

Allow staff person to [No Change ▼]
send emails

Allow staff person to [No Change ▼]
view lesson plans

Allow staff person to [No Change ▼]
manage resources

Attendance Page

Allow staff person to [No Change ▼]
mark absent students
eligible for a make-up
class