

# Staff Portal Setup Step 4 - Customize Staff Settings

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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:

**Staff: Dianne H Harris**

← RETURN SAVE CHANGES DELETE

Instructor Schedule (PDF) Add Time Entry Instructor Calendar Weekly Schedule Email

Summary Classes Compensation Time Card **Portal Settings** Feedback Skills Certifications Availability Misc Picture Notes (1)

**Staff Portal Settings**

**Login**

Email Password Reset Link

Match to User ID diharris

Staff Portal Login ID

Login message

Login message expiration mm/dd/yyyy

**My Time Card Tab**

Time entry method Clock In/Out

Default Department D-TEACH

Additional Dept News ADMIN

Can split time between Departments Yes

**Manage Classes Tab**

What classes should this staff person see?

☒ 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: Ballet

☐ All Active Classes at Staff Portal Location

☐ None

Allow staff person to enter attendance Yes

Allow staff person to update skills/levels Yes

Allow staff person to send emails Yes

Allow staff person to view lesson plans Yes

Allow staff person to manage resources Yes

Email replies sent to

☐ Organization email

☒ Staff person's email

[Organization Defaults](#)

[dlinth@gmail.com](#)

**Attendance Page**

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

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](#).

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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 Departments No Change ?

### 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 enter attendance No Change

Allow staff person to update skills/levels No Change

Allow staff person to send emails No Change

Allow staff person to view lesson plans No Change

Allow staff person to manage resources No Change

### Attendance Page

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