

Staff Portal Setup Step 4 - Staff Settings

There are two groups of customizable settings that control how your staff interacts with the Staff Portal.

- Settings that are applied to your system as a whole and affect all staff (see [Step 1: Staff Portal Settings](#)).
- Settings that are applied to individual staff on the Portal Settings tab of their Staff record.

Step 4 in the Staff Portal Setup applies to the individual settings:

Staff: Livy Wallace

[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 (0) | Resources (0)

Staff Portal Settings

My Schedule Tab

Allow staff person to view availability

Allow staff person to manage availability

My Time Card Tab

Time entry method

Default Department

Additional Dept News

Can split time between Departments

Manage Classes Tab

What classes should this staff person see?

Their Classes Only (returns classes from all locations, including Substitutions)

Their Classes with option to Show All of Today's Classes

Their Classes AND All Classes with Category 1:

All Active Classes at Staff Portal Location

None

Allow staff person to enter attendance

Allow staff person to update skills/levels

Allow staff person to send emails

Allow staff person to view lesson plans

Allow staff person to manage resources

Allow staff person to update Sizes

Email replies sent to

Organization email [Organization Defaults](#)

Staff person's email wallacelivy@gmail.com

Attendance Page

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

Staff Settings

Edit All Staff Portal Settings (Step 4 of the Staff Portal Setup) enables you to set up or edit these settings for your staff in bulk (versus individually for each Staff record > Portal Settings tab).

1. Select the **checkbox** next to the staff name(s) whose Staff Portal Settings you want to set up or edit. Select the **Check All** button if the changes will apply to all staff listed. Use the **Uncheck All**

button to reset.

2. In the My Schedule Tab section, define whether you want the staff to be able to view and manage their availability in the Staff Portal or only view it.
3. 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. Learn more about [Settings for the Staff Portal Time Clock](#)
4. 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. Learn more about [Settings for Staff Portal Attendance](#).
5. **Save** your changes.
6. Select **Go To Step 5:Send Portal Login Email** → to advance to the final setup step. See [Staff Portal Setup Step 5—Send Portal Login Email](#), or you can leave the setup and continue later.

In the example below, Livy Wallace's Time entry method will change from Manual In/Out to Clock In/Out (see image above). The Manage Classes tab will now display All Active Classes at the Staff Portal Location, instead of only her assigned classes, and she will now be able to update student sizes in the Staff Portal. All other settings will remain unchanged.

Edit All Staff Portal Settings

[← RETURN](#)

[SAVE](#)

[SEND PORTAL LOGIN EMAILS →](#)

1. Select the Staff to edit their settings below.

[Check All](#) [Uncheck All](#)

Dianne Harris

John Linton

Livy Wallace

2. Select the Settings

My Schedule Tab

Allow staff person to view availability [No Change](#)

Allow staff person to manage availability [No Change](#)

My Time Card Tab

Time entry method [Clock In/Out](#) [?](#)

Default Department [No Change](#)

Additional Dept News [No Change](#)
[Delete Existing](#)
DESK
TEACH

Can split time between Departments [No Change](#) [?](#)

Manage Classes Tab [?](#)

What classes should this staff person see?

No Change

Their Classes Only (returns classes from all locations, including Substitutions)

Their Classes with option to Show All of Today's 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](#)

Allow staff person to update sizes [Yes](#)

Attendance Page

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

[SAVE](#)

[SEND PORTAL LOGIN EMAILS →](#)