

# Lesson #5 - Staff Portal Management

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## Review (Optional)

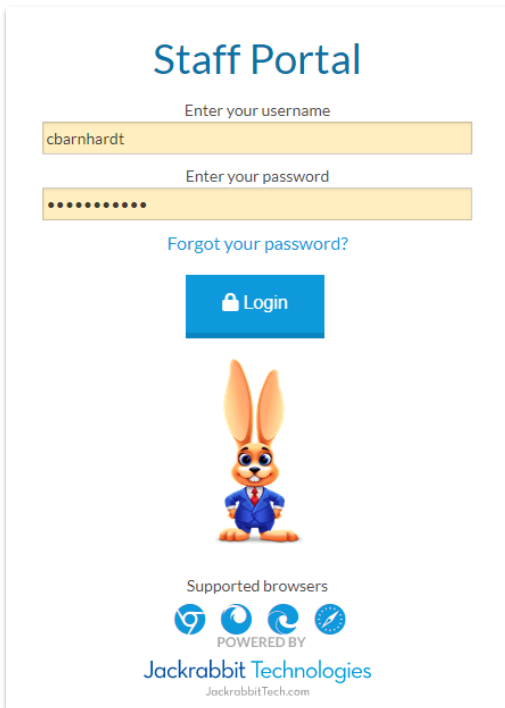
The fifth lesson in this Learning Series, Staff Portal Management, is designed to get you familiar with managing the Staff Portal in general. You may wish to review the articles in the Coaches / Instructors and Staff category before beginning.

- [Coaches / Instructors and Staff Category](#)

## Launch the Staff Portal from Within Jackrabbit

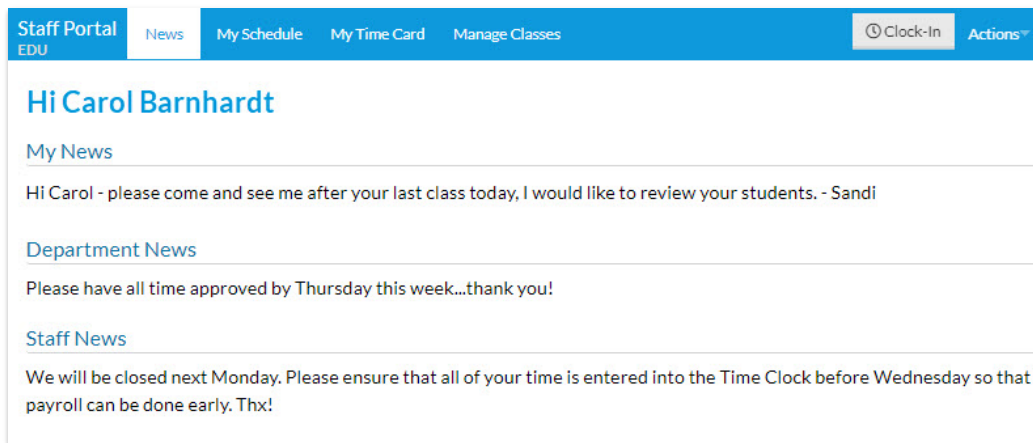
Any User ID with the *Launch Staff Portal* permission in the *Staff Portal* category (*Gear icon > Settings > Users & Permissions*) can launch the portal when they are logged into Jackrabbit.

1. Go to **Staff** (menu) > **Staff Portal** > **Launch Staff Portal**.



2. Your staff can now log into their Staff Portal.
  - The Staff Portal can remain open indefinitely, however, when inactive for longer than the **Staff Session Timeout Limit** individual staff will be logged out of the portal.
  - The Staff Portal opens to the *News* tab. Refer to [Staff Portal News - Department, Staff, and](#)

[My News](#) for more details.



The screenshot shows the Staff Portal interface. At the top, there is a blue navigation bar with the following items: 'Staff Portal EDU', 'News', 'My Schedule', 'My Time Card', 'Manage Classes', 'Clock-In', and 'Actions'. Below the navigation bar, the user's name 'Hi Carol Barnhardt' is displayed. Underneath, there are three sections of news: 'My News' with a message from Sandi, 'Department News' with a message about time approval, and 'Staff News' with a message about the portal being closed next Monday.

## Launch the Staff Portal Remotely

You can allow your staff to launch the Staff Portal remotely (through a URL as opposed to from within your database) and enable access to any of the features. This could be on your premises with an iPad on the gym floor or from a home computer through a link on your website. The Staff Portal is mobile-friendly, making data entry on smart devices easy!

When the Staff Portal is launched remotely, staff are automatically able to:

- ★ See all News (My News, Department News, and Staff News)
- ★ View and print their schedule of classes and events
- ★ View details of their classes (no information on enrolled students or contact information)
- ★ Email the contacts of enrolled students (if their individual Staff Portal Settings allow them to send emails)

To allow staff to go beyond that and update information (enter time, take attendance, update skills) when the Portal has been launched remotely, you must change your Staff Portal Settings:

1. Go to **Staff** (menu) > **Staff Portal** and select **Portal Settings**.
2. Set **Allow Remote** (*feature name*) to **Yes** for the feature you want your staff to be able to update remotely (the default is No) in the *Features* section,
3. Click **Save Changes**.

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Using the link (in the blue box) below, you can add access to the Staff Portal launch page on your website or simply email your staff the link to bookmark.



The link can be saved on a smart device and accessed just like an app. See [Save and Launch the Remote Access Staff Portal as an App on a Mobile Device](#) for full instructions.

If you are using a website editor that simply asks you for the "hyperlink" or "website URL" or "website address" to link to, then *highlight your desired text or image* and use the code in the blue box as the link. If prompted, also choose "link to other webpage" and "open in new window":

```
https://app.jackrabbitclass.com/jr3.0/TimeClock/StaffLogin?orgId=XXXXXX
```

If you are using a traditional hard-coded web editor, use the HTML code in the yellow box. This example uses the text *Staff Portal Login* as the text to display for the link, but you may change it to any text phrase or image that you prefer by replacing that section in the code below:

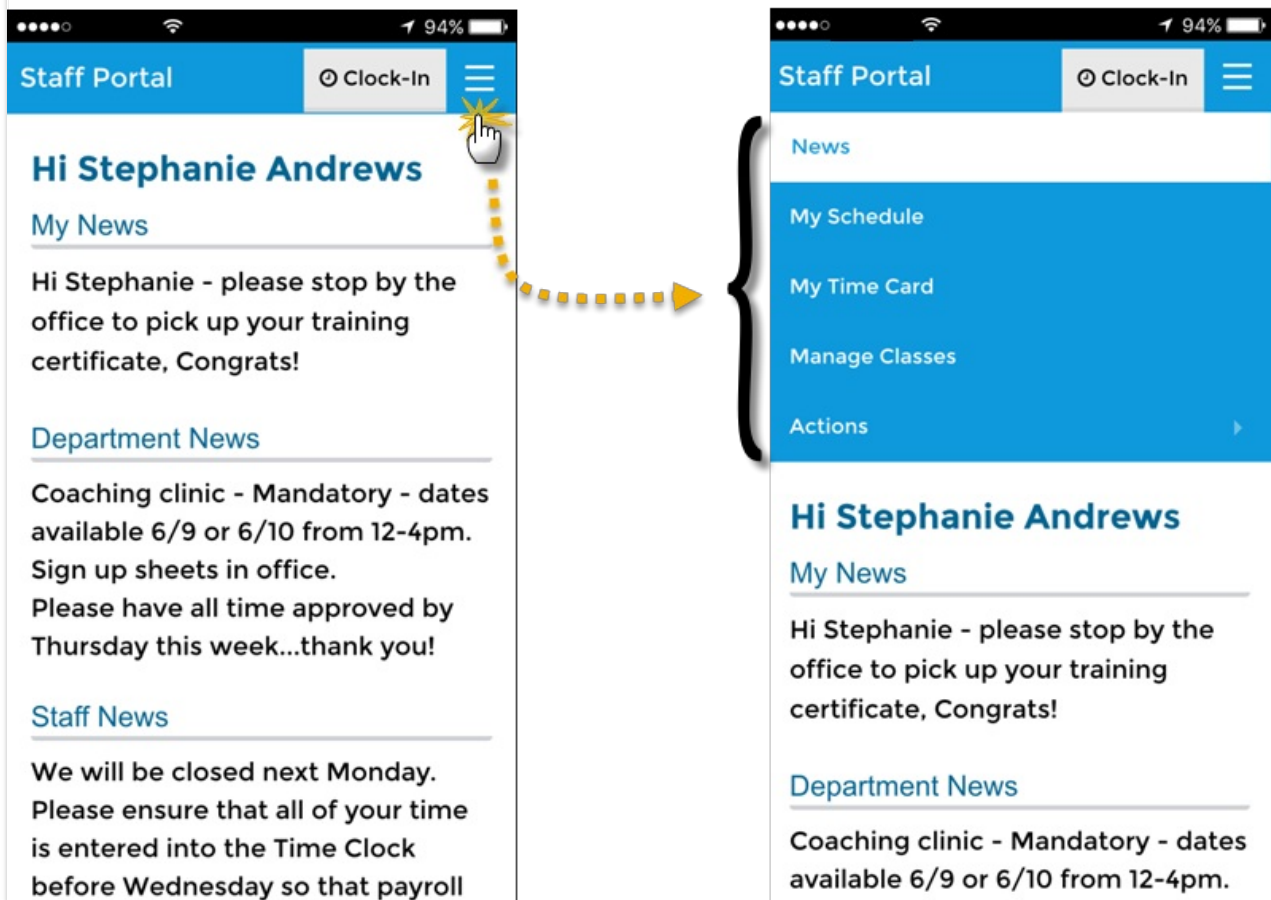
```
<a href="https://app.jackrabbitclass.com/jr3.0/TimeClock/StaffLogin?orgId=XXXXXX" target="_blank">Staff Portal Login</a>
```



Remember to substitute **YOUR ORG ID** in place of the XXXXXX! Find your Organization ID under the *Gear (icon) > Settings > Online Registration*.

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Example when logged in from a Portal launched on a smart device (remotely)



## Save and Launch the Remote Access Staff Portal as an App on a Mobile Device

Did you know that you can add an icon to your home screen for quick access to the Staff Portal? With a bookmark icon on your home screen, you don't have to type the URL every time you want to access the Staff Portal. You can just tap the icon, and the Staff Portal will open.

Adding a Staff Portal icon to your iPhone, iPad, or Android home screen is easy. Read below to learn how.

### Add a Staff Portal Bookmark to a Mobile Home Screen

1. On your mobile device, open [your Staff Portal URL](#) in your browser.
2. Log in to the Staff Portal using your username and password.
3. Navigate to your browser's menu. (In most mobile browsers, this is a three-dot menu near the

address bar. In Safari, it will be an icon of a square with an up arrow in the bottom center of the screen.)

4. Click the menu option for **Add to Home Screen** or **Add to Phone**.
5. Enter a name for your icon.
6. Click **Add**.
7. An icon will now appear on your home screen that you can use to launch your Staff Portal with one click. You can move and organize the icon just like any other app icon on your home screen.



Most modern mobile browsers support adding URL bookmark icons to your home screen. The exact steps to add a bookmark icon may vary depending on the device and browser you are using.

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## ☑ Frequently Asked Questions

Expand/Collapse  
All

## Reset a Staff Portal Password

There may be occasions where a staff person forgets their password and is unable to log into their Staff Portal. Your staff is able to use the *Forgot your password?* link to generate a new password.

The password can also be reset through your database. How to reset the password depends on whether the staff person is logging into the Staff Portal with an assigned Staff Portal Login ID or whether they are logging in using their Jackrabbit User ID and password (when a staff person is linked to a User ID).



A staff member must be active in order to log into the Staff Portal. They will see a message on the Staff Portal login screen "This staff member is inactive and cannot login".

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## ☑ Reset Password Using the *Forgot your password?* Link

Expand/Collapse  
All

- ☑ [Reset a Staff Portal Login ID Password \(from in Jackrabbit\)](#)
- ☑ [Reset a Jackrabbit User ID Password \(from within the database\)](#)
- ☑ [Frequently Asked Questions](#)

## Staff Portal News - Department, Staff, and My News

There are 3 types of news options available to broadcast to staff: *My News*, *Department News*, and *Staff News*. Staff & Department News are both created and managed from the *Staff (menu) > Staff Portal > Department News*. My News, or the Login Message, is managed from the individual staff member's record. All news broadcasts are displayed on the News tab in the Staff Portal.

The screenshot shows the Staff Portal interface for Carol Barnhardt. The top navigation bar includes 'Staff Portal EDU', 'News', 'My Schedule', 'My Time Card', 'Manage Classes', 'Clock-In', and 'Actions'. The main content area is titled 'Hi Carol Barnhardt' and contains three news items, each with a highlighted header:

- My News:** Hi Carol - please come and see me after your last class today, I would like to review your students. - Sandi
- Department News:** Please have all time approved by Thursday this week...thank you!
- Staff News:** We will be closed next Monday. Please ensure that all of your time is entered into the Time Clock before Wednesday so that payroll can be done early. Thx!

## Add My News

My News is specific to the staff person and can not be viewed by any other staff person. This message is entered in the individual staff person's record.

1. Go to **Staff (menu) > Active Staff**.
2. Select a staff person.
3. Click the staff member's **Portal Settings** tab.
4. Enter a **Login Message** to display as *My News*.
5. Optionally, enter a **Login Message Expiration** date (the message will no longer display on or after that date). **Note: This does not automatically clear the Login Message field on that date.**
6. Click **Save Changes**.

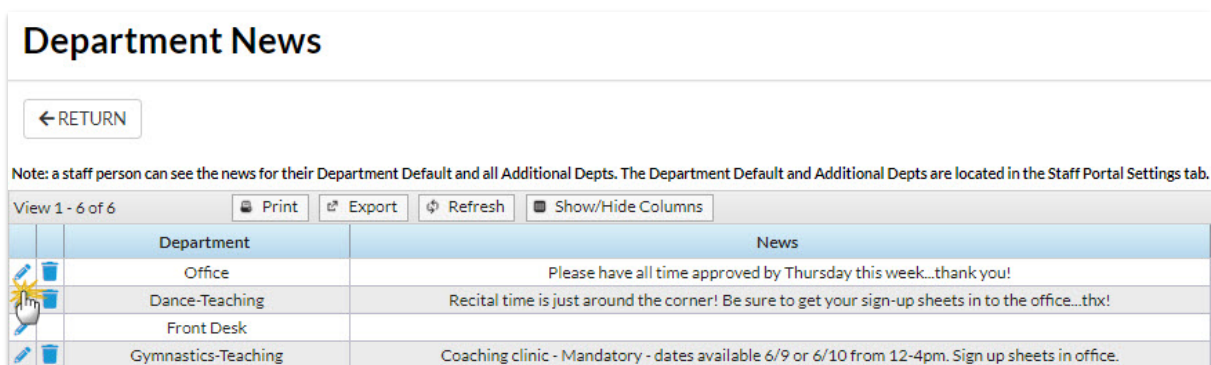
When the staff member logs in, the saved message is visible on the News tab, under the My News heading. **Note: If no expiration date is entered the news will display until you clear the Login Message field.**

## Add Department News

This is visible only if the staff member has the specific *Department* saved on their *Staff* record > *Portal Settings* tab in the *Default Department* or *Additional Dept News* fields.

When the staff member in the department (or departments) logs into their portal, the saved news is visible on the *News* tab, under the *Department News* heading. **Note:** *The news displays until deleted using the trash can icon or updated using the pencil icon.*

1. Go to **Staff** (menu) > **Staff Portal** > **Department News**.
2. Click the **pencil icon** to the left of the *Department* to edit.
3. Add/edit the news in the editor that opens. **Note:** The editor works much like the email editor allowing you to change fonts, colors, styles, etc.
4. Click **Save**.











**Department News**

← RETURN

Note: a staff person can see the news for their Department Default and all Additional Depts. The Department Default and Additional Depts are located in the Staff Portal Settings tab.

View 1 - 6 of 6    Print    Export    Refresh    Show/Hide Columns

	Department	News
 	Office	Please have all time approved by Thursday this week...thank you!
 	Dance-Teaching	Recital time is just around the corner! Be sure to get your sign-up sheets in to the office...thx!
 	Front Desk	
 	Gymnastics-Teaching	Coaching clinic - Mandatory - dates available 6/9 or 6/10 from 12-4pm. Sign up sheets in office.

## Add Staff News

This news is visible to all staff members who access the Staff Portal.

1. Point to **Staff** (menu) > **Staff Portal** > **Staff News**.
2. Add your announcement in the *Edit Staff News* editor. **Note:** *The editor works much like the email editor in Jackrabbit allowing you to change fonts, colors, styles, etc.*
3. Click **Save**.

When a staff member logs into their portal the saved news is visible on the *News* tab, under the *Staff News* heading. **Note:** *The news displays until you either edit it to change the content or clear it by deleting the message in the editor.*

## Staff Portal Login ID Report

This report, which can be filtered by Department and/or Time Entry Method, provides a listing of staff with their Department, Portal Login ID, Time Entry Method, whether they are linked to a User ID, and the date of their last portal login.

## Run a Staff Portal Login ID Report

1. Go to the **Staff** menu > **Staff Reports** > **Staff Portal Login ID Report**.
2. Select any **Search Criteria**.
3. Click **Submit**.

Staff Portal Login ID Report						
<a href="#">← RETURN</a>						
View 1 - 2 of 2						
<a href="#">Print</a> <a href="#">Export</a> <a href="#">Refresh</a> <a href="#">Show/Hide Columns</a>						
Dept	Staff Name	Linked to User ID	Portal Login ID	Last Portal Login/out	Last Time Clock Entry	Time Entry Method
Gymnastics-Teaching	<a href="#">Stephanie Andrews</a>	steph Andrews			5/30/2023 2:15 PM	Manual In/Out
Gymnastics-Teaching	<a href="#">John Linton</a>		JLinton		3/31/2023 10:30 AM	Total Hours

## Staff Portal Log

The **Staff Portal Log** is a great way to review Staff Portal activity. This report can be found under the **Staff** menu > **Staff Reports** > **Staff Portal Log**.

- ★ Review who is logging in to their Staff Portal.
- ★ Select **Filter Options** from the drop-down list or use **Filter Text** to search for specific words.
- ★ Determine why a staff member is having difficulty logging in to the Staff Portal.
- ★ Keep track of where the staff members are logging in to the Staff Portal.

## Search Criteria

Use the Search Criteria to narrow the report results:

- If you have multiple locations in your database, you have the option to look at Staff Portal activity based on location using the *Location* drop-down.
- Use the **Filter Option** to select a specific item from the drop-down list or leave the selection blank to select all.
- Select a Staff member from the drop-down list (only active staff will appear in the list).
- Choose the time frame you want to review by using the **Activity Date From/Through Date**



## Staff Portal Log

← RETURN

Search Criteria  Favorites Save Favorites Refresh ?

Search for Portal Activity using search criteria below.

Location

Filter Option

Filter Text

Staff

Activity Date From  Through Date

- Logins
- Login Failures
- Password Resets
- Attendance
- Email
- Skills
- Time Entry

## Report Results

The report results can be further customized with the ability to show or hide columns of information, sort columns, or modify column widths.

- The **Show/Hide Columns** button allows you to customize your report by selecting which information to display.
- The **Sign In** column shows where the staff member logged in.
- Use **Restore Columns** to view all available columns.
- This report can be printed or exported to Excel as a CSV or PDF file.

### Staff Portal Log

← RETURN

View 1 - 5 of 5    2 columns hidden

Date/Time	Sign In	Staff Name	Linked to User ID	Login	Staff Email	Message
9/16/2023 9:09:38 PM	Remote	Heather Barnhardt	hbarnhardt	0	hbarnh@email.com	Staff Portal Login failed. Unknown Username: Ritchie
8/22/2023 12:58:55 PM	Internal	Theo Choi	tchoi	3	tchoi@email.com	tchoi logged in successfully
8/22/2023 12:52:21 PM	Internal	Theo Choi	tchoi	3	tchoi@email.com	tchoi logged in successfully
8/22/2023 12:51:38 PM	Internal	Theo Choi	tchoi	3	tchoi@email.com	tchoi logged in successfully
8/22/2023 12:48:37 PM	Internal	Heather Barnhardt	hbarnhardt	0	hbarnh@email.com	App user credentials authenticated. App user: EricHC not matched to Staff Member



The Staff Portal Log will include report results for all search criteria effective 11/30/2023.

## Closed Dates

The **Closed Dates** feature allows you to designate in your settings specific days that your facility will be closed.

Jackrabbit uses Closed Dates to:

- ★ Streamline attendance for dates where it is expected that all students will be absent.
- ★ Alert parents to the closure in the Parent Portal.
- ★ Prorate tuition fees for classes missed due to the closure.

- 
- ☑ [Add a Closed Date](#)
  - ☑ [Closed Dates and Attendance](#)
  - ☑ [Closed Dates in the Parent Portal](#)
  - ☑ [Prorating Tuition for Closed Dates](#)

[Expand/Collapse All](#)



Closed dates added to your account are not reflected in any Calendar views of classes in Jackrabbit!

## Optional Topics - Lesson #5

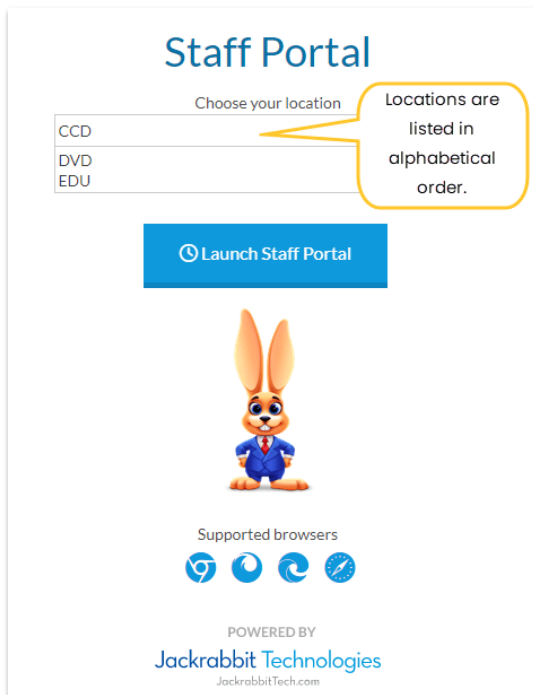
Review the following articles if they apply to your organization.

## Launch the Staff Portal for Multi-Locations

When you have more than one Jackrabbit Location in your database there is an additional step required when you are launching the Staff Portal. The Staff Portal must be launched for each Location separately.

A drop-down list allows you to select which Location to launch the Staff Portal for. This is an alphabetical listing of the Location Codes (not Location Names) in your database. **Note: There is no way to change the ordering from alphabetical.**

Click the **Launch Staff Portal** button and your staff will see the login screen.



When launching the Staff Portal remotely you can add **&Loc=location code** (where the location code is the code of the preferred Location) to the remote launch URL to automatically launch the portal for the specified Location. Example: <https://app.jackrabbitclass.com/jr3.0/TimeClock/StaffLogin?orgId=522358&Loc=Main>.

## QUIZ - Lesson #5 - Staff Portal Management

When you have worked through all of the articles outlined in the lesson, select the Take the Quiz button to be taken to the Lesson #5 Quiz where you can test your understanding of the concepts in this lesson. You will be asked to enter an email address for quiz results to be sent. The quiz includes Review questions.

### Quiz #5 - Staff Portal Management

**TAKE THE QUIZ**

Number of Questions	Total Possible Points	Points Needed for an "A"	Points Needed for a "B"	Points Needed for a "C"
11	13	10	9	8



The quiz question for the optional topic for this lesson has been added to the regular quiz.

- [Return to Supervisors and Managers Menu to continue to next lesson](#)
  - [Click here to provide feedback for this lesson](#)
-