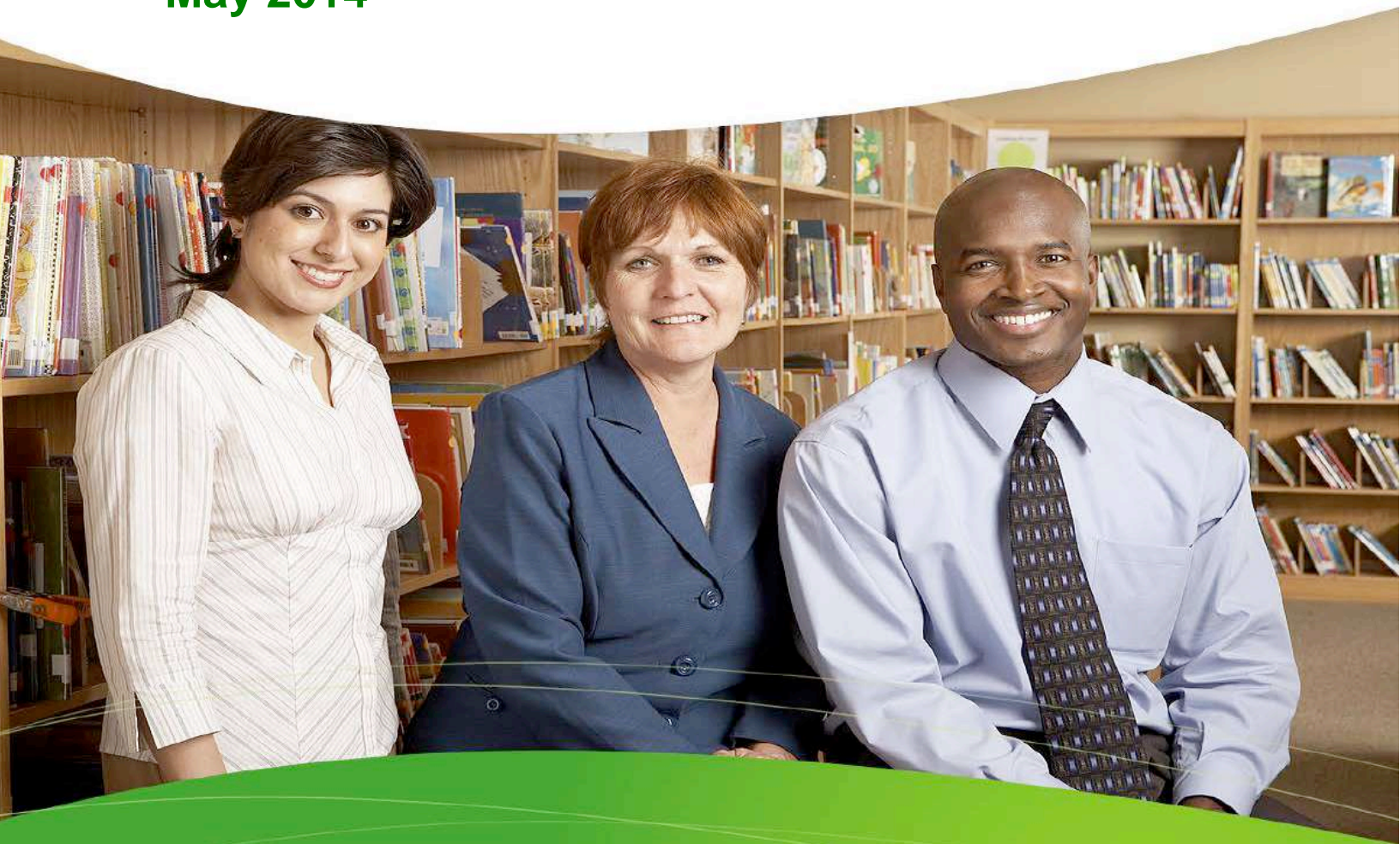


SmartFindExpress

Administrator User Guide

Version 2.5

May 2014



STATEMENT OF CONFIDENTIALITY

This information has been prepared for the express purpose of providing your organization with information about the functions and use of the eSchool Solutions SmartFindExpress system. This material contains proprietary product information and may not be reproduced, used by, or disclosed to persons not in the employ of the recipient without the prior written consent of eSchool Solutions. **Company Confidential/Do Not Distribute – Do Not Post on Unsecured Web Sites (such as your district web site).**

Copyright ©2002-2014 by eSchool Solutions Inc. Confidential

NOTE: Refer to the System Administrator User Guide for more detailed information on all of the Administrator features in the system.

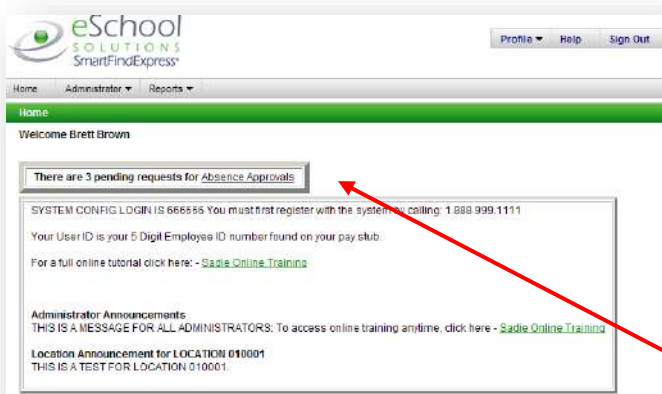
Logging into SmartFindExpress

1. Open your Internet browser and go to polson.eschoolsolutions.com. The system Welcome message and any district-wide announcements are displayed.
2. Two identifiers are required to log in to the system: Access ID and PIN or District login. Click **Submit** to access the system.
3. If you have forgotten your password, click the **'Trouble signing in?'** link.
4. Follow the instructions on the screen and then click **Submit**. Your password will be sent to the email address on your profile.
5. Upon successful login, your home page is displayed. From your home page, you can manage your personal information and perform a variety of administrative tasks.

District-wide Announcements



Enter User ID and Password



1. Enter User ID
2. Enter Security Code
3. Click Submit

From your Home Page you can:

- ✓ Modify Profile Information
- ✓ Get Help While You Work
- ✓ Perform Administrative tasks
- ✓ Create, access and run reports

Managing Profile Information

The **Profile** feature lets you view profile information, update your email address and change your passwords.

View Profile Information

Your current status in the system and your address in the system are shown. Contact your system administrator with any changes.

Update Your Email Address

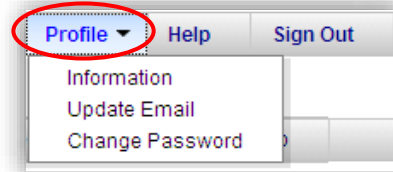
Type in your new email address and click Save.

The system automatically sends Job Creation and Job Cancellation emails (if your district uses this feature). For more information, contact your System Operator.

Change Password

Enter your current password and the new password. You can enter up to 9 digits. Click Save.

Note: *If your district is configured to use Web Passwords, the Change Password feature will include an option to change the Web password.*

A screenshot of the 'E-mail' update form. The form has a green header bar with the text 'E-mail'. Below the header, there is a section titled 'Email' with the following fields: 'Email:' (containing 'bsmith@eschoolsolutions.com'), 'New email:' (an empty text box), and 'Re-enter email:' (an empty text box). At the bottom left of the form is a blue 'Save' button. A red arrow points from the 'Update Email Address' text to the 'New email:' field.

Update
Email
Address

A screenshot of the 'Change Password' form. The form has a green header bar with the text 'Change Password'. Below the header, there is a section titled 'Change Password' with the following fields: 'Phone Password (PIN)' (a label), 'Current:' (an empty text box), 'New:' (an empty text box with a note 'Numeric up to 9 digits' below it), and 'Confirm New:' (an empty text box). At the bottom left of the form is a blue 'Save' button. A red arrow points from the 'Change Phone Password (PIN)' text to the 'New:' field.

Change Phone
Password (PIN)

Help

Getting Help While You Work

Click the Help tab to access Help guides and How-to videos.

Sign Out

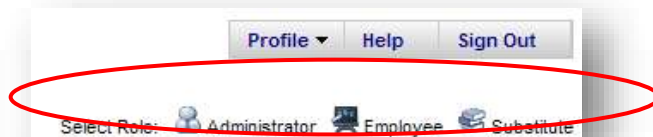
Exiting the System

Click the Sign Out tab to exit the system.

Select Role

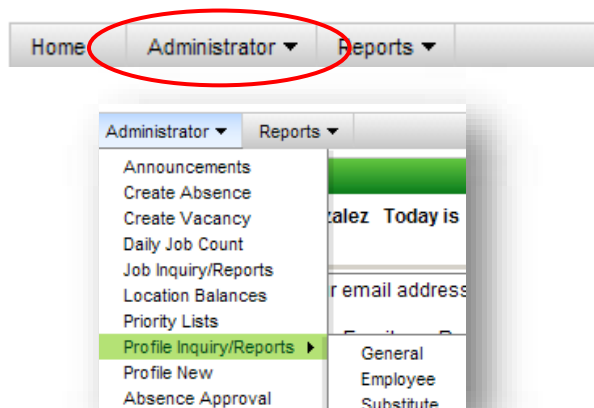
Change User Role

For multi-role administrators, the system lets you automatically switch between profiles to complete tasks. No need to log out of the system and back in again!



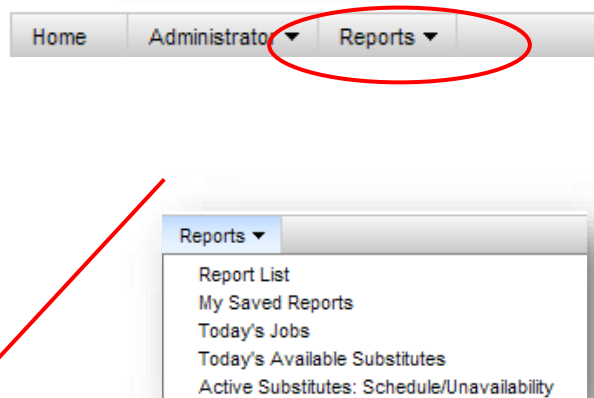
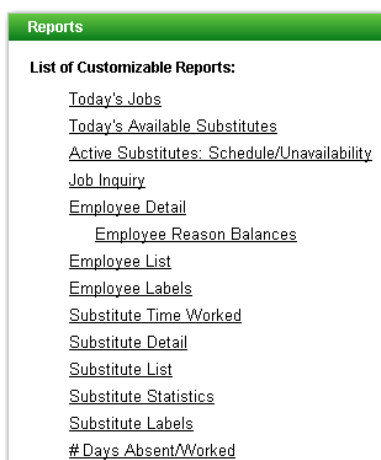
Administrator Menu

The Administrator menu enables you to perform a variety of tasks from creating announcements, absences and vacancies to performing job and profile inquiries, obtaining daily job counts, maintaining priority lists, and working with absence approval requests.



Reports Menu

The Reports menu enables you to quickly create a variety of job, employee and substitute reports for your location(s), save report settings for re-use, schedule reports and instantly generate job and substitute reports for the current day for your location.



Announcements

1. Click on **Announcements** from the Administrator menu.
2. Click New to display the New Announcement form. Select the announcement type, location and language and type in the announcement text.

Carriage returns can be used when entering the text to start a new line. HTML tags can be used to create bold, underline and italics text.

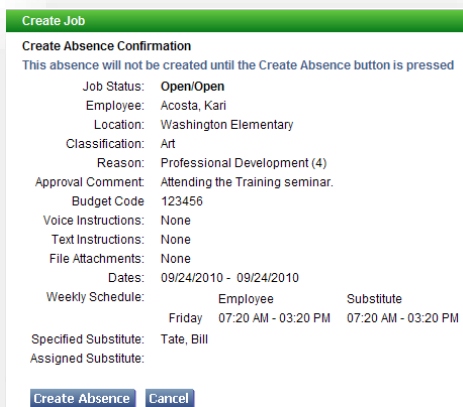
3. To modify an announcement, click on the Location link from the Announcement List to display the Modify Announcement screen.
4. To delete an announcement, click in the Delete box next to the announcement and then click the Delete button.

Create Absence

1. Click on **Create Absence** from the Administrator menu.
2. Enter the employee's Access ID or click **Name Lookup** to search for the employee by name.

3. The employee's primary location is shown. To select a different location, use the drop-down menu.

4. Select a reason for the absence. If the reason for the absence requires absence approval, an Approval Comment box is displayed. Add any special notes on the absence request.
5. Enter a budget code if one is required for the reason.
6. Change the default value of Yes to No if a substitute is not required for the absence.
7. Enter the dates for the absence if different from today's date.
8. The employee's weekly schedule is displayed. Make any modifications to the schedule times and/or days. Uncheck days that do not apply to the absence. Multiple-day jobs can have different start and end times. To change the times and/or AM/PM value, select the field and use the up/down arrows on your keyboard to make any changes. If separate Absence and Substitute times are used, Start/End Time fields will display for both sets of time. *A time modification to Absence Start will automatically reflect on Substitute Start Time; a time modification to Absence End Time will automatically reflect on Substitute End time.*
9. To specify a substitute, enter the Substitute ID or click Name Lookup to find the substitute name.



The screenshot shows a 'Create Job' dialog box with a green header. Below the header is a section titled 'Create Absence Confirmation' with a warning message: 'This absence will not be created until the Create Absence button is pressed'. The form contains the following fields and values:

| | |
|-----------------------|---|
| Job Status: | Open/Open |
| Employee: | Acosta, Kari |
| Location: | Washington Elementary |
| Classification: | Art |
| Reason: | Professional Development (4) |
| Approval Comment: | Attending the Training seminar. |
| Budget Code: | 123456 |
| Voice Instructions: | None |
| Text Instructions: | None |
| File Attachments: | None |
| Dates: | 09/24/2010 - 09/24/2010 |
| Weekly Schedule: | Employee: Friday 07:20 AM - 03:20 PM Substitute: 07:20 AM - 03:20 PM |
| Specified Substitute: | Tate, Bill |
| Assigned Substitute: | |

At the bottom of the dialog are two buttons: 'Create Absence' and 'Cancel'.

10. Click "Yes" if the substitute is known and has verbally accepted the job from the person reporting the absence. The substitute is then responsible for accessing the system and verifying that the employee did prearrange them to their absence, and obtain the job number. Click "No" if the substitute has not accepted this assignment. Calls will be placed to the substitute to offer the job.
11. Add any instructions for the substitute. The instructions are also voiced to substitutes over the IVR.
12. Attach any files to the job. Up to three attachments can be added.
13. Add any comments on the absence.
14. Click Continue to confirm the job.
15. On the Create Absence Confirmation page, verify that the absence information is correct and then click Create Absence to create the job or Cancel to return to the Job Create form.

16. If the absence was created for a reason that requires approval, a note would display on the Create form and the job would be created with the status of Approval Pending/Open.

17. The Create Absence Verification page displays the job number for the absence.

Create Vacancy

1. Click on **Create Vacancy** from the Administrator menu.
2. Calendar is a pull-down menu of all the calendars that can apply to this vacancy. The "All Locations" calendar is the default.

The calendar dictates the workdays, holidays, and "No Substitute Required" days that will apply to this vacancy.

3. Location is a pull-down menu of all the locations for which this vacancy can apply. The locations that you are authorized to view will appear in the list.
4. Classification is a pull-down menu of all the classifications for which this vacancy can apply.

Create Job

Note - The selected reason requires approval. The system will submit the request for approval when you confirm this absence.

Create Absence Confirmation
This absence will not be created until the Create Absence button is pressed

Job Status: **Approval Pending Open**
 Employee: Karen Todd
 Location: WASHINGTON ELEMENTARY SCHOOL
 Classification: TEST CLASSIFICATION 101
 Reason: REASON ABSENCE 001 001
 Voice Instructions: None
 Text Instructions: None
 File Attachments: None
 Dates: 07/25/2010 - 07/25/2010
 Weekly Schedule: Monday 08:00 AM - 04:00 PM 30 minutes Unpaid Break 08:00 AM - 04:00 PM 30 minutes
 Specified Substitute: TEST SUBSTITUTE-2300000
 Assigned Substitute:

Create Absence **Cancel**

A vacancy is created when no employee exists to be absent and a substitute is needed.

Create Job

Create Vacancy

Vacancy Information
To complete this vacancy, press Continue and proceed until a job number is assigned.

Calendar: All Locations
 Location: ZZ TEST LOCATION 999999
 Classification: ZZ Test Classification 999
 Reason: Sick Leave (1)
 Start: 09/24/2010 End: 09/24/2010
 Dates: 09/24/2010 09/24/2010
 Substitute Times: Start 07:30 AM End 03:30 PM Unpaid Break 30 minutes
 07:30 AM 03:30 PM 30 minutes
 REPORTING MULTIPLE DAYS?
 If the days are non-consecutive or if every day of the vacancy does not start and end at the same time, press Modify Times.
 Modify Times
 Substitute
 Specify a Substitute? ID: Name Lookup
 PRE-ARRANGED?
 If the specified substitute has accepted this assignment and does not need to be contacted, press YES.
 Has the substitute accepted this job? Yes No
 Substitute Instructions: (Maximum Characters=1000)
 File Attachments: Browse... (Maximum file size=2048K)
 Administrator
 Comments:

Continue **Reset**

5. The Reason pull-down menu displays absence/vacancy reason.
6. A Budget Code field may display *only* if the reason for the vacancy requires a budget code. If the reason has been set up to “collect” a budget code, you must enter a budget code to create the job.
7. The default for entry of a vacancy is today’s date. To edit the dates, click the Calendar icon to display the calendar, or type in the new dates in the specified format.
8. The Substitute Times defaults to the location times. To edit the times, all four digits of the time must be entered in hh:mm am or pm format.
9. The amount of unpaid break time in minutes (i.e., lunch) for this Classification. Unpaid Break minutes (such as unpaid lunch breaks) can be optionally configured for Classifications.
10. Click Modify Times if the days are non-consecutive, or if each day of the vacancy has a different start/end time. The Create Vacancy - Modify Times screen displays.
11. To specify a substitute, enter the substitute’s ID. If the ID is unknown, click *Name Lookup*.

Uncheck days that do not apply to the vacancy.

| Weekly Schedule | | Start Time (hh:mm am) | End Time (hh:mm am) |
|-----------------|-------------------------------------|--------------------------|------------------------|
| Monday | <input checked="" type="checkbox"/> | 07:30 AM | 03:30 PM |
| Tuesday | <input checked="" type="checkbox"/> | 07:30 AM | 03:30 PM |
| Wednesday | <input checked="" type="checkbox"/> | 07:30 AM | 03:30 PM |
| Thursday | <input checked="" type="checkbox"/> | 07:30 AM | 03:30 PM |
| Friday | <input checked="" type="checkbox"/> | 07:30 AM | 03:30 PM |

12. Click “Yes” to indicate that the substitute is known and has verbally accepted the job from the person reporting the vacancy. The substitute is then responsible for accessing the system, verifying that the vacancy was assigned to them, and obtaining the job number. Click “No” if the substitute has not accepted this assignment.

Substitute

Specify a Substitute? ID: [Name Lookup](#)

PRE-ARRANGED?

If the specified substitute has accepted this assignment and does not need to be contacted, press YES.

Has the substitute accepted this job?: ☐ Yes ☒ No

Substitute Instructions: (Maximum Characters=1000)

File Attachments: [Browse...](#) (Maximum file size=2048K)

13. Add any instructions you want to provide to the substitute. These instructions will also be voiced to a substitute over the telephone.

Administrator

Comments:

[Continue](#) [Reset](#)

14. Attach any files that you want to provide to the substitute or administrator. Up to three attachments can be added.
15. Click **Continue** for the next page. If any errors are detected on the form, you will have the opportunity to make corrections.
16. On the Create Vacancy Confirmation page, verify that the absence information is correct and then click **Create Vacancy** to create the job and receive a job number. To modify vacancy information, click Cancel to return to the Create Vacancy form.
17. The Create Vacancy Verification page displays the job number for the vacancy.

Create Job

Create Vacancy Confirmation

This vacancy will not be created until the Create Vacancy button is pressed

Job Status: Open/Open

Calendar: All Locations

Location: Sunnyland Elementary

Classification: Art 406

Reason: Jury Duty (5)

Budget Code: None

Voice Instructions: None

Text Instructions: None

File Attachments: None

Dates: 09/24/2010 - 09/24/2010

Weekly Schedule: Times

Friday 08:00 AM - 03:30 PM

Specified Substitute:

Assigned Substitute:

[Create Vacancy](#) [Cancel](#)

18. Click **Create Vacancy** to display the Create Vacancy Verification screen. A job number is created for the vacancy.

Create Job

Create Vacancy Verification

Job Creation - Successful.

Job Number: 24381

Job Status: Open/Open

Calendar: All Locations

Location: Sunnyland Elementary

Classification: Art 406

Reason: Jury Duty (5)

Budget Code: None

Voice Instructions: None

Text Instructions: None

File Attachments: None

Dates: 09/24/2010 - 09/24/2010

Weekly Schedule: Times

Friday 08:00 AM - 03:30 PM

Specified Substitute:

Assigned Substitute:

[New Vacancy](#) [Retain Job Data](#)

Daily Job Counts

1. Click the **Daily Job Counts** Menu to display the number of jobs per day for a selected reason and location.
2. Select the Month and Year for the search. Dates can be any date in the past, or up to one year in the future.
3. Select the reason from the list of available reasons. If a reason is not selected, the system displays a job count for all reasons.
4. Select a location from the list of authorized locations/ location groups.
5. Search results display in Calendar format for the current month and year. Use the Next and Previous buttons to scroll to other months.

Daily Job Counts

Search Criteria

Month: Year:

Reason:

Location:

Search

September 2010

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---------|---------|---------|---------|---------|---------|---------|
| | | | 1 0 | 2 0 | 3 0 | 4 0 |
| 5 0 | 6 0 | 7 0 | 8 1 | 9 0 | 10 0 | 11 0 |
| 12 0 | 13 0 | 14 5 | 15 4 | 16 2 | 17 3 | 18 0 |
| 19 0 | 20 3 | 21 2 | 22 2 | 23 1 | 24 3 | 25 0 |
| 26 0 | 27 1 | 28 1 | 29 1 | 30 1 | | |

Job Inquiry/Reports

1. Click the **Job Inquiry/Reports** Menu. **Refer to Table A for descriptions of Job Status and Sub Status conditions that can apply to a job.**
2. To search for job information for a specific job, enter the job number or the Split from Job number.
3. To search on job information for a group of jobs, select the search criteria. Click the **More Search Options** button to display additional search fields.
4. To display a list of all jobs in the database for today, use the defaults values and click **Search**.

Job Inquiry

Search Criteria

Enter Job #: OR

Split from Job #:

OR

Job Type: ☒ All ☐ Absences ☐ Vacancies

Job Status:

Sub Status:

Search from: Search to:

Sort Order: Then by:

Records Per Page:

Job Inquiry

Search Criteria

Enter Job #: OR

Split from Job #:

OR

Job Type: ☒ All ☐ Absences ☐ Vacancies

Job Status:

Sub Status:

Search from: Search to:

☐ Jobs which are split from other jobs

Classification:

Location:

Reason:

Employee Access ID:

Sub Status Access ID:

Budget Code:

Reported Date:

Assigned On:

Sort Order: Then by:

Records Per Page:

☐ Jobs with Cancelled Assignments

☐ Jobs with same day Cancelled Assignments

☐ Jobs with minimum # days duration


| Table A: Job Status and Subsidiary Status Descriptions | |
|--|--|
| Job Status | Description |
| Open | Jobs that occur today, or in the future, and are not filled. |
| Active | Jobs that occur today, or in the future and have a substitute assigned. |
| Finished | Jobs that occurred in the past. A job is "finished" when the end time of the job is reached. |
| Verified | Job detail information has been confirmed as accurate. |
| Canceled | Jobs that no longer need to be in the system. Can be past, present, or future jobs. |
| Stopped | Open jobs that have been stopped for callout. |
| Subsidiary Status | |
| Open | Job is not currently being offered to a substitute; awaiting callout; no substitute is assigned. |
| No Sub Required (NSR) | Substitute not assigned because the days were set up in the calendar as NSR days. |
| Filled | A substitute has been assigned to the job. |
| Not Filled | The system has reached the end of the search rule for the classification of the job and no substitute is assigned. |
| Web Substitute Search | Substitute on the Web searched for available jobs and accepted this job. |
| IVR Substitute Search | Substitute on the IVR searched for available jobs and accepted this job. |
| NSR(various) | NSR – Filled In-House -Job filled using in-house personnel instead of a substitute. NSR – Exceeded Substitute Allocation -Substitute not assigned because the SAUs for the employee's location are met for the period of the absence. NSR – Minimum Job Days - Substitute not assigned because the "Minimum Job Days" setting for the employee's classification; the length of the job was not long enough to justify a substitute for this position. NSR – User Request -Substitute not assigned because the employee indicated that a substitute is not required for the job. NSR – No Sub Allowed - Substitute not assigned because of the "No Sub Allowed" setting for the employee's classification. |
| Admin Assigned | Job assigned to a substitute from the job modification screen. |
| IVR - Assigned | Substitute assigned to the job when the IVR called the substitute to offer the job. |
| IVR – Answering Machine | During callout, the system reached the substitute's answering machine and the job was assigned to the substitute. |
| Prearranged | Substitute not contacted for the job because a substitute was assigned at job creation. |
| Automatic Assignment | Job was filled from the Automatic Assignment list for the location of the job. |

- After the search has been performed, the list of jobs matching the search criteria is displayed.
- To verify the accuracy of finished jobs on the Jobs List, use the Verify buttons (if displayed). Click *Set All to Verify* to place a checkmark in the Verify field of each job. Click *Save Verified* to update each record with a checkmark.
- To create a report from the search results, click Create Report.
- The Job Report setup page is displayed.

The screenshot shows the 'Job Inquiry' interface. At the top, there are search criteria fields including 'Enter Job #', 'Split from Job #', 'Job Type' (All, Absence, Vacation), 'Job Status' (Open & Active), 'Sub Status' (All), 'Search from' (04/30/2014), 'Search to' (04/30/2014), 'Sort Order' (Job #), and 'Records Per Page' (50). Below these are buttons for 'Search', 'Create Report', 'Export', and 'More Search Options'. The 'Job List' section contains a table with columns: Job #, Employee Name, Location, Reported Date, Text, Voice, and Comments. The first row shows a job for 'Jones, Kate' with status 'Open' and a reported date of '04/27/2014 7:38 PM'. The 'Set All to Verify' and 'Save Verified' buttons are circled in red.

9. Select the report details and the options for displaying totals on the report. With this level of control, you can create many different types of job reports.

10. Click View Report to display the Job Report



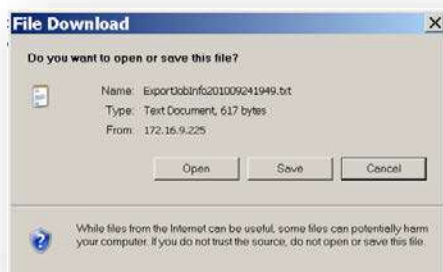
| # | Status Employee Substitute | Access ID Access ID | External ID External ID | Classification Location Reason | Class PR Sub PR Level | Job Start Sub Start Reported By Verified By | Job End Sub End Reported Date Verified On | Job Hr Sub Hr Job Un |
|----|---|------------------------|----------------------------|--|-----------------------------|--|---|----------------------------|
| 03 | Active/Pre Arranged Anderson, Karen Joan, Allen | 13 10102 | 13 | Grade 4 Sunland Elementary PMLA | 1 | 10/11/2010 08:00 AM 10/11/2010 08:00 AM E. Anderson, Karen | 12/17/2010 03:30 PM 12/17/2010 03:30 PM 06/13/2010 10:47 AM | 07:30 162.0 |
| 15 | Open/Open Austria, Karl | 1183 | 1183 | Agriculture/Biology Washington Elementary | | 10/11/2010 08:00 AM 10/11/2010 08:00 AM | 10/11/2010 04:30 PM 10/11/2010 04:30 PM | 08:30 |

10. **To export job data** for all jobs on the Job List, click Export on the Job Inquiry page after the job search has been performed. Exported information can be used in other databases or applications.

11. The Job Inquiry Export page is displayed.

12. Select the export format and click Run Now.

13. On the File Download page, click Open to display the exported job information in Notepad, or click Save to save the export document as a file.



- Fixed Length format applies to SEMS 3.0 formats.
- Delimited refers to SmartFindExpress formats.

| Job List | | | | | | |
|-------------------|---------------------|---------------------|--------------------------------------|---------------------|----------|--|
| Set All to Verify | | Save Verified | | | | |
| Job # | Employee Name | Substitute Name | Location | Reported Date | Text | |
| Status | Job Start | Sub Start | Classification | Class Pay Rate | Voice | |
| Verify | Job End | Sub End | Reason | Sub Pay Rate | Comments | |
| | Job Duration | Sub Time Worked | Budget Code | | File | |
| 24363 | Anderson, Karen | Joan, Allen | Sunnyland Elementary | 09/13/2010 10:47 AM | No | |
| Active/ | 10/11/2010 08:00 AM | 10/11/2010 08:00 AM | Grade 4 | | No | |
| Pre Arranged | 12/17/2010 03:30 PM | 12/17/2010 03:30 PM | FMLA | | No | |
| | 07:30 | | 1001111121250000 | | No | |
| 24402 | Beam, Althea | Open | French Prairie Middle School - other | 09/30/2010 3:55 PM | No | |
| Open/ | 10/15/2010 07:45 AM | 10/15/2010 07:45 AM | Grade 6 Math | | No | |
| Open | 10/15/2010 03:45 PM | 10/15/2010 03:45 PM | Non-Contract | | No | |
| | 08:00 | | 1001121121342050 | | No | |

14. **To view/modify job details,** from the Job List, click on the job number of the job you want to review.

15. The Job Details page is displayed. From the Job Details page, you can view/modify job details; create job detail reports, view job filling details and stop/start callout on a job. The job's status determines the actions that can be performed on the Job Detail page.

Create Report--

Creates a job detail report for the specified job.

Filling Details--

View the calling information for the job and create Job Filling Details reports.

Split Job-- Click the *Split Job* button to split the single or multi-day job into new job segments and add or modify substitute assignments for each job segment.

Start Callout--

Displays only if the job has a status of Stopped, Unfilled, or NSR during a callout period.

Stop Callout--

Displays only if the job has a status of Open and is currently in callout.

Job Detail

Job Number: 2 Location: ZZ Test Location
Status: Open/Open Classification: ZZ Test Classification
Employee: J255L388 Calendar: All Locations
Access ID: 45645457 Search Rule: Typical
Step: Classification List Location

[Create Report](#) [Filling Details](#) [Split Job](#) [Reset](#) [Return To List](#) [Stop Callout](#) [Save](#)

Clicking the "Cancel Job" button will not save other changes

[Cancel Job](#)

Changes are not updated until Save is pressed

Reason: ZZ Test Reason 999

Budget Code:

Date From: 05/05/2014 To: 05/07/2014

| | Weekly Schedule | | Absence Times | | Substitute Times | |
|-----------|-----------------------|---------------------|-----------------------|---------------------|-----------------------|---------------------|
| | Start Time (hh:mm am) | End Time (hh:mm am) | Start Time (hh:mm am) | End Time (hh:mm am) | Start Time (hh:mm am) | End Time (hh:mm am) |
| Monday | 07:30 AM | 04:00 PM | 07:30 AM | 04:00 PM | 07:30 AM | 04:00 PM |
| Tuesday | 07:30 AM | 04:00 PM | 07:30 AM | 04:00 PM | 07:30 AM | 04:00 PM |
| Wednesday | 07:30 AM | 04:00 PM | 07:30 AM | 04:00 PM | 07:30 AM | 04:00 PM |
| Thursday | 07:30 AM | 04:00 PM | 07:30 AM | 04:00 PM | 07:30 AM | 04:00 PM |
| Friday | 07:30 AM | 04:00 PM | 07:30 AM | 04:00 PM | 07:30 AM | 04:00 PM |



Job Detail

Job Filling Details

Search Criteria

Job Number: 24363
Display Calls: ☒
Display Disqualified Substitutes: ☐

Record

[Search](#) [Create Report](#) [Return](#)

Job Filling Details List

| Date/Time | Subs |
|--------------------------|------|
| 09/13/2010 10:47:21:0 AM | Joan |

Assigned Substitute

Name:
Access ID:
Telephone #:
Accepted On:
Level:
Pay Rate:
Substitute Pay Rate:

Modify the assigned substitute

Substitute ID: [Name Lookup](#)

Specified Substitute

Name:
Access ID:
Telephone #:
Last time called:

Modify the specified substitute

Substitute ID: [Name Lookup](#)

Test Instructions:
Administrator Comments:
File Attachments: None

Add a File: [Browse...](#) (Maximum file size=512K)

Reported Date: 04/27/2014 05:04 PM Last Modified On:
Reported By: Jones, Kate Last Modified By:

[Create Report](#) [Filling Details](#) [Split Job](#) [Reset](#) [Return To List](#) [Stop Callout](#) [Save](#)

Location Balances

1. Click on **Location Balances** from the Administrator menu.
2. To display a location's remaining SAUs or In-House Filling Capacity balance, choose the location from the Location drop-down menu, select the type of balance to be displayed, specify the date range and click Search.

Substitute Allocations Units are the number of absences at a location that may be filled by substitutes during a specific time period. When a location reaches the limit, all additional absences are reported as No Substitute Required - SAU

The In-House Filling capacity is the daily limit a location is assigned for the number of absences to be filled by in-house personnel before a substitute can be assigned.

Priority Lists

Priority Lists give substitutes preference over other substitutes and determine the order in which jobs are offered via the web, call-in, or call-out. A substitute can be placed on a location, location group, or employee's Preferred list. Priority Lists can be modified and reports can be created.

1. Select a list type for the search. **Refer to the following table for Priority List descriptions.**

| Type | Description |
|----------------------------|--|
| Do Not Use-Active/Inactive | The Do Not Use list identifies substitutes who should not be offered or assigned jobs at a given location, or for a particular employee. Active lists are used by the system for job processing. Inactive lists are used strictly for historical tracking of Do Not Use entries for a substitute, employee, or location. |
| Automatic Assignment | Typically used when a location has permanent substitutes who should be assigned before any other substitutes are called. This list can be added or removed from the search rule setup. If a substitute on the list for that location is available, the system assigns that substitute to the job and notifies the absence creator that the job has been assigned from the Automatic Assignment list. |
| Preferred List | This list identifies substitutes who are preferred for an employee, location, or location group. Preferred lists can have a specific classification or have no classification. Search rules determine the order in which the Preferred lists are used. Typically, priority lists that are classification-specific are checked first to attempt to match classification specific lists with the classification of the job. |
| Custom | Custom lists can be used to identify substitutes for specific circumstances. Custom lists are created by the operator and inserted into the search rules. Each custom list has a name that is shown in the pull-down list of list types. |

and then click the Make Inactive button at the bottom of the screen.

2. If the list type selected is Active Do Not Use or Inactive Do Not Use, a Reason field will appear next to the List Type field. Select the reason for the substitute being added to the list.
3. When the "Subs at/above alert threshold for Do Not Use reason" option is enabled, the Reason field will appear. Select the Do Not Use Reason for the search. The system will search for all substitutes currently at the alert threshold limit for the selected reason. Other search fields are disabled.
4. The classification determines the list to which the substitute is assigned.
5. The locations in the pull-down menu are the locations found in the administrator's profile.
6. Enter the Employee ID or, click *Name Lookup* to search for the employee by name.
7. Enter the Substitute ID or click *Name Lookup* to search for the substitute by name.
8. Enter the date range for when the entry was added to a priority list.
9. Click Search to display the Priority List search results.

Priority List

321 items found, displaying 1 to 60.
[FIRST / PREVIOUS] 1, 2, 3, 4, 5, 6, 7 [NEXT / LAST]

| Delete | Make Inactive | Print Letter | Substitute | Access ID | Entry Date | List | Reason (Do Not Use) | Classification | Location/Employee | Name | Sub List | Level | Orders |
|--------------------------|--------------------------|--------------------------|-----------------------|-----------|------------|-------------------|---------------------|----------------|-------------------|-------------------------------------|----------|-------|--------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Anderson, Christopher | 1897 | 03/06/2009 | Active Do Not Use | | | Location | Washington Elementary - Special Ed. | 1 | 1 | 4984 |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Anderson, Christopher | 1897 | 03/06/2009 | Active Do Not Use | | | Location | Washington Elementary | 1 | 1 | 4984 |

10. To change an Active DNU entry to Inactive, check the Make Inactive box for the entry

Search Criteria

List Type: Reason:

Search Criteria

List Type: Reason:

☒ Subs at/above alert threshold for Do Not Use reason

Priority Lists

Search Criteria

List Type:

Classification:

Location:

☐ When selecting a group, include locations assigned to the group

Employee:

Substitute:

Entry Date:

Sort List by: Then by:

Records Per Page:

Profile Inquiry/Reports

Search for employee and substitute profiles, create reports and export profile information.

1. Click on **Profile Inquiry/Reports** from the Administrator menu. Profile searches can be performed for a single profile or for multiple employee and substitute profiles.

General Profile

1. To

Profile Inquiry

Search Criteria

Last Name: ☒ Begins with ☐ Contains

First Name: ☒ Begins with ☐ Contains

Access ID:

External ID:

Call Back #:

Records Per Page:

search for a specific profile, click the **General** menu option. The Profile Inquiry screen is displayed. Enter the search criteria for the profile and click Search. From the search results, select the profile to view/update.

Employee Profile

1. To access information on multiple employees at one time, click the **Employee**

Employee Profile Inquiry

Search Criteria

Status: ☒ All ☐ Active ☐ Inactive

Registered: ☒ All ☐ Yes ☐ No

Itinerant: ☒ All ☐ Yes ☐ No

Calendar:

Classification:

Location:

Sort List by:

Then by:

Records Per Page:

11. To send a notification letter to a substitute to inform them of their entry on an Active Do Not Use list, click the Print Letter box next to the entry and click the Print button at the bottom of the screen. A notification letter can be generated for every Active DNU entry.

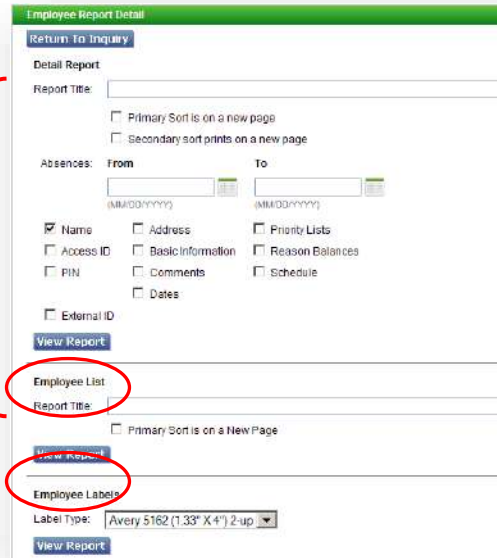
menu option. The Employee Profile Inquiry screen is displayed. Enter the search criteria for the profiles and click Search.

- From the search results, profile information can be viewed and modified. Employee information can be exported and employee reports can be created.

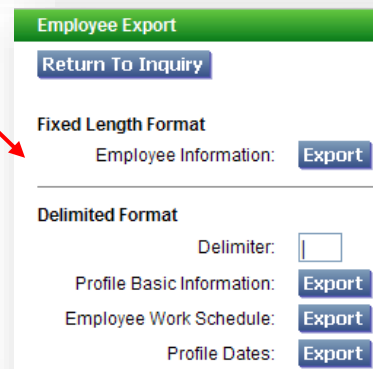
The screenshot shows the SmartFindExpress interface. At the top, there is a navigation menu with two main sections. The left section contains 'Profile Inquiry/Reports' (highlighted in green) and 'Absence Approval'. The right section contains 'General' and 'Employee'. A red arrow points from the text 'Employee reports can be created.' in the list above to the 'Employee' link in the navigation menu. Another red arrow points from the text 'profile information can be viewed and modified' to the 'Profile Inquiry/Reports' link. Below the navigation menu, the 'Employee List' is displayed. It shows a table with 642 items found, displaying 1 to 50. The table has five columns: Name, Access ID, Status, Prim. Location, and Prim. Classification. The first three rows of data are visible.

| Name | Access ID | Status | Prim. Location | Prim. Classification |
|-------------------------------|-----------|--------|-----------------------------|----------------------------------|
| Acosta, Kari | 1183 | Active | Washington Elementary | Art |
| Adams, Jamie | 1299 | Active | Heritage Elementary - other | Kindergarten Bilingual - Spanish |
| Adcock, Debra | 2051 | Active | Woodburn District Office | Program Secretary |

3. To create employee reports, click Create Report to display the Employee Report Detail page. Select the report options for the Detail report and click View Report to display the report.
4. To create an Employee List report for all employees appearing in the search results, click View Report in the Employee List section of the report page.
5. To create an Employee Labels report for all employees appearing in the search results, select the label size from the Label Type drop-down and click View Report.
6. To export employee data, click Export to display the Employee Export screen. Click the Export button next to the data to be exported. The exported file is automatically created as a text file in Notepad.



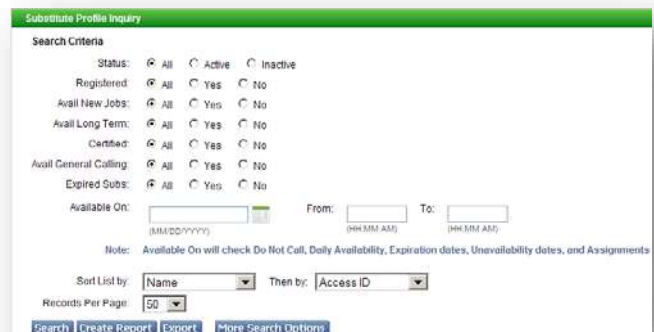
The screenshot shows the 'Employee Report Detail' page. A red bracket groups the 'Detail Report' section (with 'View Report' button) and the 'Employee List' section (with 'View Report' button). Another red circle highlights the 'Employee Labels' section, which includes a 'Label Type' dropdown menu set to 'Avery 5162 (1.33" X 4") 2-up' and a 'View Report' button.



The screenshot shows the 'Employee Export' page. It has two main sections: 'Fixed Length Format' and 'Delimited Format'. Each section has an 'Export' button. The 'Delimited Format' section also includes a 'Delimiter' dropdown menu.

Substitute Profile

1. To access information on multiple substitutes at one time, click the **Substitute** menu option. The Substitute Profile Inquiry screen is displayed. Enter the search criteria for the profiles and click Search.
2. From the search results, profile information can be viewed and modified. Employee information can be exported and employee reports can be created.

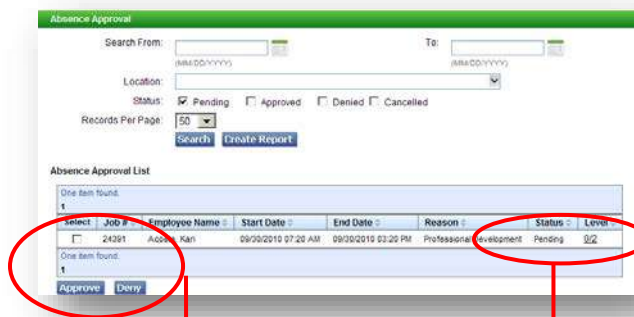
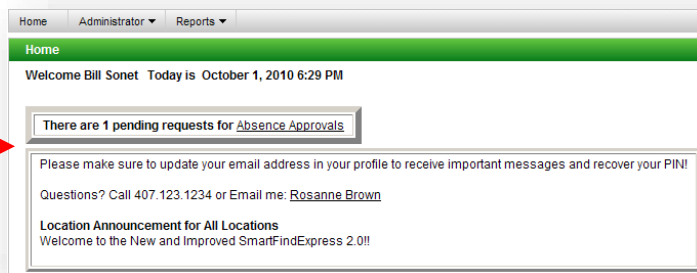


The screenshot shows the 'Substitute Profile Inquiry' page. It features a 'Search Criteria' section with radio buttons for 'Status' (All, Active, Inactive), 'Registered' (All, Yes, No), 'Avail New Jobs' (All, Yes, No), 'Avail Long Term' (All, Yes, No), 'Certified' (All, Yes, No), and 'Avail General Calling' (All, Yes, No). There are also fields for 'Expired Subs' and 'Available On' with date pickers. A 'Note' states: 'Available On will check Do Not Call, Daily Availability, Expiration dates, Unavailability dates, and Assignments'. At the bottom, there are dropdowns for 'Sort List by' (Name) and 'Then by' (Access ID), a 'Records Per Page' dropdown (50), and buttons for 'Search', 'Create Report', 'Export', and 'More Search Options'.

3. To create substitute reports, click Create Report to display the Substitute Report Detail page. Select the report options for the Detail report and click View Report to display the report.
4. To create a Substitute List report for all substitutes appearing in the search results, click View Report in the Substitute List section of the report page.
5. To create a Substitute Labels report for all substitutes appearing in the search results, select the label size from the Label Type drop-down and click View Report.
6. To create a Substitute Statistics report for all substitutes appearing in the search results, enter the date range for the statistics to be displayed and click View Report.
7. To export substitute data, click Export to display the Substitute Export screen. Click the Export button next to the data to be exported. The exported file is automatically created as a text file in Notepad.

Absence Approval (Absence Approval may not be used in your district.)

1. To approve/deny pending absence approval requests, click the Absence Approvals link in the notification message on your home page, or select Absence Approval from the Administrator menu.
2. The Absence Approval List displays all of the absence approval requests in the system that can be approved on your approval level or below.
3. To approve or deny an absence request, click the Select box for the absence request and then click the Approve or Deny button.
4. To view the history on a request, click the Level link to display the Absence Approval History log for the request. The log shows the history of actions performed on the request (for each level), such as when the request was submitted, emails sent, and request status.
5. To provide any additional information on the absence approval request, enter comments in the Comments box and click Add.

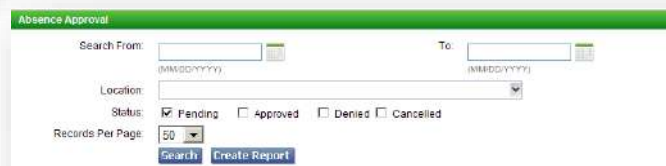


A Select box appears next to the requests that you can approve/deny. Click the Select box and then click either the Approve or Deny button.

Click the Level link to display the history page for the specific absence approval request. View the history, approve/deny the request/ add comments.



8. To search for existing or future absence approval requests, enter the date range for the search, select the location from the drop-down, and select the status condition(s) for the search.



9. The Absence Approval List displays summary information on the absence requests.
10. Click the Level link to review the history on the absence approval request. Comments may still be added to the request.
11. To create an Absence Approval Report, click Create Report.
12. On the report detail page, enter the search criteria, choose the output format and select the fields to display on the report. Click View Report to display the report. Click Save Report to save the report to the My Saved Reports" folder, (accessible from the Reports menu). Click Save & View to display and save the report.

Absence Approval List

One item found.

| Select | Job # | Employee Name | Start Date | End Date | Reason | Status | Level |
|--------|-------|---------------|---------------------|---------------------|--------------------------|--------|-------|
| | 24427 | Anglin, Eric | 10/11/2010 07:30 AM | 10/11/2010 03:30 PM | Professional Development | Denied | 4/3 |

One item found.

Absence Approval History

Job Number: 24427

| Action | Person | Date | Status |
|-----------|------------------|------------|---------|
| Submitted | Dave, Carol | 10/11/2010 | Pending |
| Emp Email | Anglin, Eric | 10/11/2010 | Pending |
| Denied | Sullivan, School | 10/13/2010 | Denied |
| Emp Email | Anglin, Eric | 10/13/2010 | Denied |

Return

Comments:

No items found.

Add a new comment:

Add

(Maximum Characters=256)

Report Detail

Absence Approval

Search Criteria

Search From: 08/23/2010 To: 10/01/2010
(MM/DD/YYYY) (MM/DD/YYYY)

Location: [Dropdown]

Status: ☐ Pending ☒ Approved ☒ Denied ☐ Cancelled

Output Format: HTML

Display Fields: ☐ Select/Deselect All

☐ Job # ☐ Employee Name ☐ Date
☐ Reason ☐ Status ☐ Level
☐ Comments

Name: Absence Approval Save Report Save & View

Description: Customized report of absence approval requests

View Report Return To List

Reports

1. Click **Report List** to display the list of available reports in the system.

Reports

Report List

My Saved Reports

Today's Jobs

Today's Available Substitutes

Active Substitutes: Schedule/Unavailability

2. Click on the link of the report you want to create.

3. The report's setup page is displayed.

4. Select the search criteria to be used for the report and select the information to display on the report from the Display Fields section of the setup page.

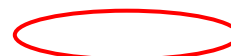
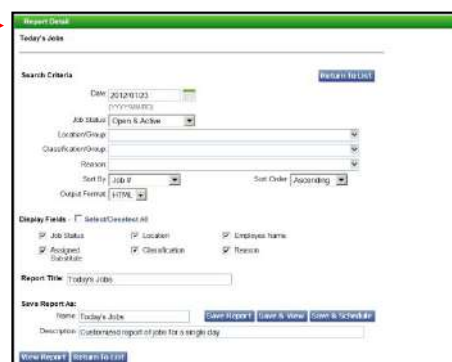
5. After entering the report parameters, click **View Report** to view the report or one of the "Save" options: **Save Report**, **Save & View** or **Save & Schedule**. Saved reports display in the "My Saved Reports" folder.

6. To access your saved reports, click the **My Saved Reports** option from the Reports menu. The Saved Report List is displayed.

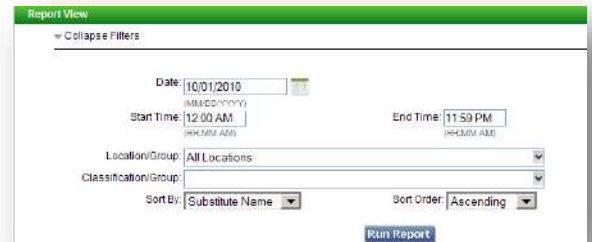
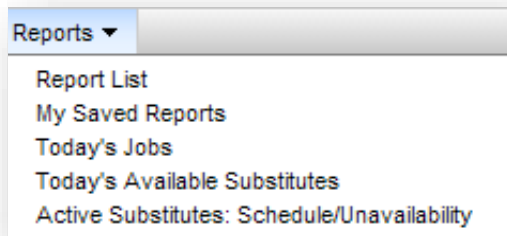
- **View Report** – Displays the contents of the report and the export formats.
- **Edit Report** – Displays the report setup page. Edit the report parameters and rerun the report. Make any changes to the existing search criteria fields and to the display field selections.
- **Schedule Report** – Displays the Schedule Report page. Reports can be scheduled to run immediately, one time, or on a recurring basis.

7. To generate an on-demand report, click the quick link for the report from the Reports menu.

- **Today's Jobs** - displays all job information for the administrator's location(s) for a single day.
- **Today's Available Substitutes** - displays availability information on all substitutes for the current day.
- **Active Substitutes** - displays schedule and unavailability dates/times for all active substitutes who can accept jobs for the administrator's location(s).



8. The report is automatically generated for your location.
9. To export the report data, click on an export icon at the top of the report page.
10. To apply different filters to the report, and re-run the report, click the Expand



Filters link to display the search criteria fields for the report.

11. Enter the new search criteria and click Run Report. The system displays a new version of the report.

Report data can be exported as a PDF, Excel, Word, or CSV file.