SmartFindExpress

System 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 SmartFind*Express* 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).**

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Table of Contents

Introduction

Welcome to SmartFindExpress!

The System Operator's module of the SmartFind*Express* system allows you to quickly and easily access configuration, operations, and administrator features. You can interact with SmartFind*Express* over the Internet or over the telephone.

System Overview

SmartFind*Express* is a technology solution that integrates database records with telephone Interactive Voice Response (IVR) and Internet browser-based technology. It automates the absence entry process and the substitute search and job assignment process. Telephone IVR and computer browser software (such as Internet Explorer or Netscape), both communicate with SmartFind*Express* to update database information. SmartFind*Express* automates the process of:

- Reporting employee absences
- Selecting the most qualified substitute available
- Notifying and assigning substitutes to assignments
- Reporting on detail and statistical trends and unemployment information
- Providing reports to administrators on absence status and absence assignments
- Recording assignment information and tracking the status through completion for record keeping and management reports.

SmartFind*Express* offers over one hundred parameter settings to meet your organization's specific needs and can be accessed 24 hours a day, 7 days a week via the telephone and Internet.

In SmartFind*Express*, employees and administrators create absences. Administrators can create vacancies. Vacancies and absences are referred to as jobs. Absences are jobs for which an employee is absent. A vacancy does not have an absent employee, but a substitute is required at that location.

About this Guide

The order of this guide matches the organization of the main menu bar so you can quickly access the support and reference information you need to perform administrative tasks.

This guide contains the following chapters:

Introduction provides an overview of the SmartFind*Express* system and describes the organization of this guide and the conventions used.

Getting Started provides information on system requirements, system access and password assistance, and provides information on the features and functions on the Administrator home page.

Support for Additional Languages provides information for districts configured for more than one language on setting up and voicing selection lists and completing information on system configuration screen.

Administrator Menu provides detailed information on configuring and using system administrator tools to manage, monitor and maintain job, administrator, employee, and substitute information.

System Operations Menu provides detailed information on importing/exporting profile information, obtaining substitute availability information, using the System Activity log, performing global updates to substitute information and on obtaining information of the days worked by an employee or substitute.

System Configuration Menu contains detailed information on adding, modifying and reporting on budget codes, calendars, certifications, classifications, dates, locations, reasons and search rules.

Parameters Menu contains all of the procedures for setting district-wide configuration parameters, including parameters for jobs, telephone, administrator, employee, substitute and system emails.

Telephone Menu provides information on configuring and monitoring telephone lines and on configuring telephone voicing for system menus, locations, classifications, reasons and other system features.

Reports Menu provides access to the list of reports in the system that administrators can access, run and save from one central location. It also provides access to saved reports and enables administrators to generate on-demand reports on jobs, available substitutes and active substitutes for the current day for their location.

Configuring System Features to Limit Substitute Assignments describes how to use the In-House Filling, Substitute Allocation Units, and Minimum Job Days features to limit substitute assignments at a location.

Configuring System Features to Limit Employee Absences describes how to use the Reason Balance and Maximum Daily Absences features to limit employee absences.

How Substitutes Search for Available Jobs, describes the methods used on the IVR and Web to make jobs available to substitutes. These processes utilize various parameter settings and lists, sub lists and levels to make jobs available.

Appendix A contains descriptions for PRI error messages that can display in the System Activity Log.

In addition to the chapters in this guide, the following documents are also provided to system users as part of the product documentation package:

- Import Layouts
- Export Layouts
- Data Dictionary (request only)

Conventions Used in this Guide

To help you effectively use your documentation, this guide follows the conventions described in the following topics.

Guide Identification

The top of every page displays a header that contains the title of the guide and the current chapter name and section name.

The bottom of every page displays the publication month and year of the document.

Information Alerts

This guide uses "Notes" with the following format:

> **Note:** *This is a sample of a note. Notes provide information that will help you with the current task.*

Typographical formats

The following text format identifies special information:

Italics	Words in *italics* indicate action buttons such as *Save*, *Continue, Return to List, NEXT, and PREV.*
Bold	The name of commands and options are shown in **bold**. References to links also appear in **bold**, for example, "and click the **Start Date** link."

Getting Started

This section provides information on system requirements, login methods, and password assistance and describes the features and functions on the Administrator home page.

System Requirements

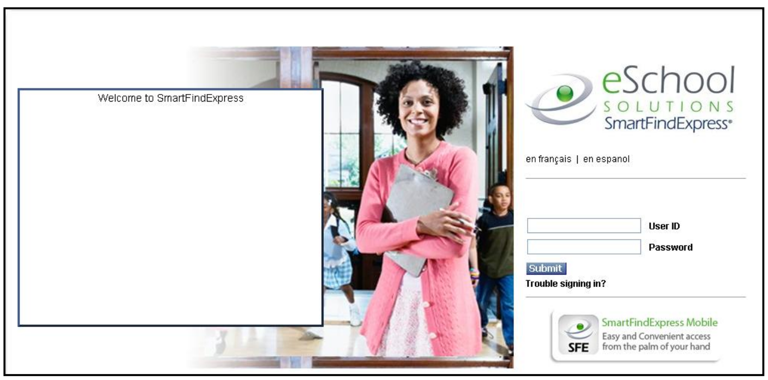
The minimum Internet Web Browser versions supported are:

- Microsoft Internet Explorer version 7.0 or above
- Mozilla/Firefox version 3.5 or above
- Safari 3.0 or above
- Adobe Acrobat version 5.0
- Adobe Flash Player version 8.0

Note: *All must have the latest service packs installed.*

Signing In

Open your Internet browser and access the SmartFind*Express* site.



Log-In Methods

SmartFind*Express* offers several login methods for the Web and is also compatible with districts' LDAP (Lightweight Directory Access Protocol) implementations.

The following table provides information on the User ID and Password combinations that can be used to log into SmartFind*Express*. These log-in methods are available per district:

User ID	Type	Size	Password	Type	Size	Description
Access ID	Numeric	9	**PIN**	Numeric	9	Current numeric login method
Web User ID	Alpha/ Numeric	255	**Web password**	Alpha/ Numeric	255	Web User ID and password are stored in SFE
Web User ID	Alpha/ Numeric	255	**PIN**	Numeric	9	Web User ID and PIN are stored in SFE
Web User ID	Alpha/ Numeric	255	**LDAP password**	SFE Web log in	Web User ID	Web User ID is stored in SFE. The password is not stored. The password is validated against the district's LDAP server.

NOTE: *IVR login is always Access ID and PIN for all methods listed above. Importing and exporting will use Access ID.*

Access ID and PIN

- Utilizes Access ID and PIN. The current system access method for users. There are no changes to this method. This method is still required for IVR log-in and Web log-in.

Web User ID and Web Password

- Utilizes a Web User ID and Web password. The alphanumeric Web User ID can be up to 255 characters. The Web password can also be alphanumeric and up to 255 characters.

  The Web User ID and Web password are stored on the user's profile. The Web User ID field must be unique. These fields are optional fields.

Web User ID and PIN

- Utilizes a Web User ID, up to 255 characters and the person's PIN. The Web User ID is stored on the user's profile. The Web User ID field must be unique in SmartFindExpress for the district.

Administrators with access to profile information will have the ability to view users' optional Web User IDs on web pages and reports.

NOTE: *There is a delimited import format for Web User IDs and password (LDAP would not use the password field on the import). For more information on this import format, refer to the Imports document.*

LDAP

SmartFind*Express* Web login can work with districts' LDAP implementations. LDAP is a standard protocol used to control and grant user access to applications. The common elements in LDAP are a unique (distinguished) alphanumeric username and password for each user. In an LDAP environment, users can use the same User ID and password for multiple applications.

SmartFind*Express* stores the user's LDAP Web User ID. The password is not stored. When the user enters their User ID and Password on the sign-in page, the User ID and Password are validated against the district's LDAP server.

LDAP Login

User ID	Type	Size	Password	Type
Web User ID	Alpha/ Numeric	255	LDAP password	SFE Web log in

Password/PIN Reminders

A "Trouble signing in?" link is located on the Sign In page to support users who have forgotten their password or PIN. When this link is selected, the system displays the "Trouble signing in?" page. SmartFindExpress can send PIN and Web Password reminders, but not LDAP password reminders because that information resides only on the district's LDAP server. If a user enters a Web User ID and the district has LDAP implemented, the system will return an error message that the password cannot be provided and that the user should contact their system administrator for assistance.

NOTE: *You must be registered with the system to use this option.*

The User ID and the security code being displayed must be entered on this page.
To exit from this page, select the Back button.

If the submitted information is valid, the system sends the user an email containing their password. This information will enable the user to successfully log into SmartFind*Express*. The email is sent to the email address in the user's profile.

If the submitted information is invalid, the system returns an error message.

Language Selection

SmartFind*Express* Web and IVR functions are offered in three languages: English, Spanish and French (Canadian). The system supports the ability to have one, two, or all three languages enabled at the same time. Languages are configured as part of system set up to establish a default language for your district and to load the correct voice files.

If your district is configured for more than one language, the Sign In page is initially displayed in your district's default language. All users will be able to select another (configured) language on the Sign In page. When you select the desired language link, *en francais*, *en espanol*, or *en englais,* the Sign In screen is immediately refreshed in that language. All screens are displayed in that selected language after the user successfully logs in. **The language choice must be made before clicking the Submit button.**

Behavior of drop-down lists once the language choice is made:

- Those that come with the system, such as search criteria and list types will display in the language selected at log in.
- Those that are defined by the district, such as classifications and locations, will display in the language in which they were entered and saved in (these will not be translated by the system to display in a different language).
- **System Activity Log:**

System activity log entries will display in English, regardless of the selected language.

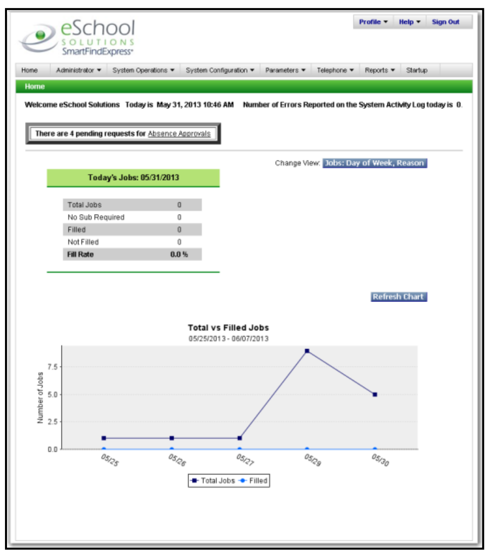
Privacy and Terms of Use Statements (ASP Service Customers only)

If your district uses SmartFind*Express* as a service from eSchool Solutions, the system will require all existing and new users to view and acknowledge acceptance of the legal "Terms of Use" policy. This action is only required the first time a user accesses the system, or if any revisions are made to the policy. The "Terms of Use" policy may be viewed from any page in the system.

The Privacy policy explains the data collection and use practices of eSchool Solutions. It can be viewed from any page in the system. Users will be alerted if any revisions are made to this policy.

System Administrator Home Page

The System Administrator home page provides access to administrator features and commands, announcements, and the administrator dashboard (if this feature is enabled).



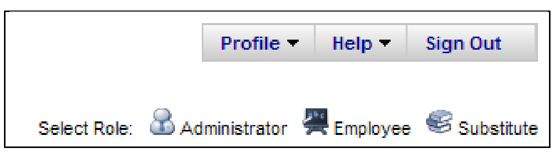
System Administrator Menu Bar

The main menu bar on the home page displays the system options available to system administrators. Most of the options are associated with a pull-down menu. The menu bar with the Profile, Help and Sign Out options is standard in SmartFindExpress and appears in each SmartFindExpress module. The following table lists the items that can be accessed from each option on the menu bar:

Menu Option	Description
Administrator	Contains the following options: Announcements, Create Absence, Create Vacancy, Daily Job Count, Job Inquiry/Reports, Location Balances, Priority Lists, Profile Inquiry/Reports, Profile New and Absence Approval
System Operations	Contains the following options: Import/Export, Substitute Availability, System Activity Log, Tools and # Days Worked
System Configuration	Contains the following options: Budget Codes, Calendar, Certifications, Classification Profiles, Classification Groups, Dates, Location Profiles, Location Groups, Reasons, Reason Menu and Search Rules
Parameters	Contains the following options: Configuration, General, Jobs, Telephone, Administrator, Employee, Substitute and Email
Telephone	Contains the following options: Telephone Lines, Telephone Monitor, and Telephone Voicing
Reports	Contains the following options: Report List, My Saved Reports and quick links for the Today's Jobs, Today's Available Substitutes and Active Substitutes: Schedule/Unavailability reports.
Profile	Contains the following options: Profile Information, Update Email and Change Password
Help	Contains the following options: system How-to videos and the Administrator Quickstart User Guide.
Sign Out Command	Select to end the session and disconnect. Selecting the browser's *Back* button or going to another site on the Internet does not disconnect the session. To ensure security and privacy of information, sign out and disconnect, or close the browser when finished with your session.

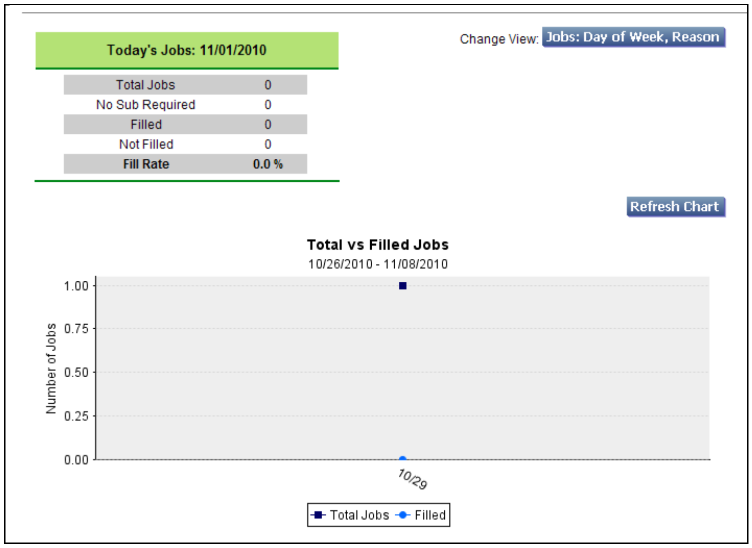
The Select Role Feature

Administrators can have dual roles in the system. An administrator can be an employee and/or a substitute as well. A *Select Role* option will appear on the home page of administrators that have multiple roles in the system. The Select Role feature enables administrators to easily toggle between their roles to complete tasks. No need to log in and out of the system. When a role is selected, the system displays the home page for that role.



Graphical Dashboard View

If the administrator profile has "View Job Information" permission enabled, the home page will automatically display with a *graphical dashboard* view. The dashboard view provides system operators with a quick-read on key job data for their authorized location(s).



The dashboard presents job data in easy-to-read charts and graphs. The *Change View* link on the homepage dashboard can be selected to display a different graphic: Most Frequent Reasons by Day of Week.

Dashboard View: Today's Jobs

The default home page view displays two sets of job data:

- Today's job statistics
- Last week's and future week's view of total jobs vs. filled jobs.

<u>Today's Jobs:</u>

This is a table view on the dashboard that shows the following statistics for the current date:

Note: *Jobs = Absences + Vacancies.*

- Total jobs (includes NSR, Filled & Unfilled jobs)
- No Sub required jobs
- Filled jobs
- Unfilled jobs
- Current fill rate (100% - Unfilled rate=fill rate)

<u>Total vs. Filled Jobs</u>

This is a 2-week graphic of total and filled jobs (absences + vacancies). The 2-week period includes 1 week prior and 1 week forward from the current date:

- Total number of jobs for the current date, plus 6 days prior and 7 days after
- Filled jobs for the same time period

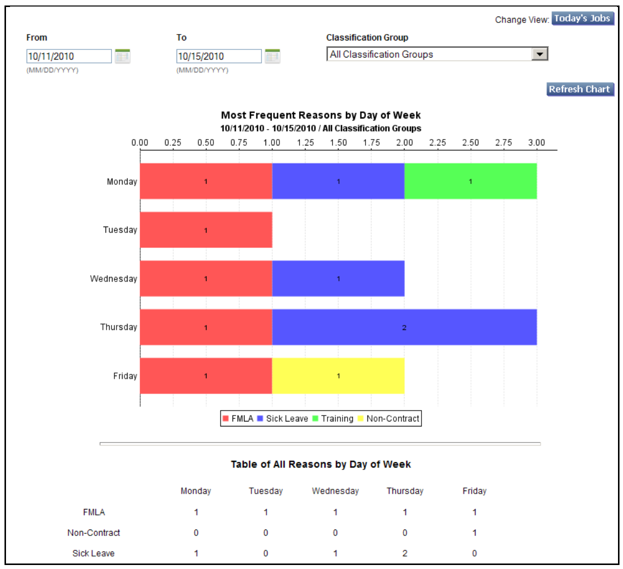
Note: *Dates that have no jobs are not displayed on the graph (i.e., weekends and holidays).*

Dashboard View: Most Frequent Reasons by Day of Week

The “Most Frequent Reasons by Day of Week” graph is accessed by clicking the *Change View* link on the default homepage dashboard. This view provides a graphic plus a table of data showing the most frequent reasons for jobs by day of week. Only the most frequent reasons are graphed to keep the visual display meaningful.

A unique color is used for each reason name graphed. The numbers that display across the top of the graph represent the total jobs graphed in the group of most frequent reasons.

The default view is for the current week and for “All Classification Groups.” A week is defined as Sunday through Saturday with the dates populated in the From/To Date fields. The default Classification Group is “All.”



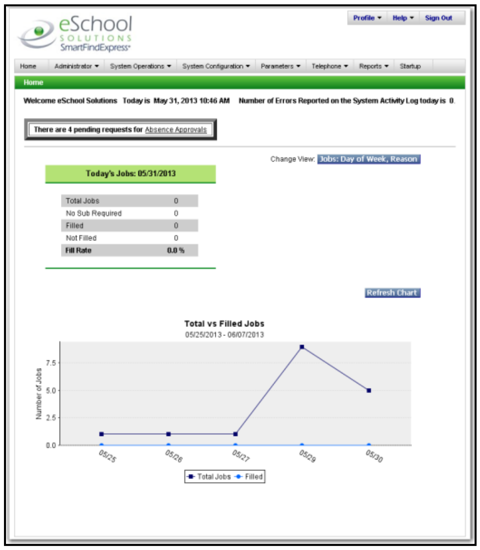
To update the graph, change the date range and/or Classification Group and then click the Refresh Chart button. If there are no jobs for a specific day of the week (i.e., Sunday, Saturday) there is no display on the chart. To switch from this view back to the original dashboard view, the *Change View* link can be selected.

<u>How Reasons are displayed in the Legend</u>

In the legend box, reason names are displayed in ascending alphabetical order by day of week. If reasons other than those in Monday’s list are added after Monday, these reasons are added after the list of Monday items in ascending alphabetical order by day of the week.

Administrator Home Page

The administrator home page provides access to site administrator features and system commands, announcements, and the administrator dashboard (if this feature is enabled).



Administrator Menu Bar

The main menu bar on the home page displays the system options available to administrators. The options are associated with a pull-down menu. The menu bar with the Profile, Help and Sign Out options is standard in SmartFindExpress and appears in each SmartFindExpress module. The following table lists the items that can be accessed from each option on the menu bar:

Menu Option	Description
Administrator	Contains the following options: Announcements, Create Absence, Create Vacancy, Daily Job Count, Job Inquiry/Reports, Location Balances, Priority Lists, Profile Inquiry/Reports, Profile New and Absence Approval
Reports	Contains the following options: Report List, My Saved Reports and quick links for the Today's Jobs, Today's Available Substitutes and Active Substitutes: Schedule/Unavailability reports.
Profile	Contains the following options: Profile Information, Update Email and Change Password
Help	Contains the following options: system How-to videos and the Administrator Quickstart User Guide.
Sign Out Command	Select to end the session and disconnect. Selecting the browser's *Back* button or going to another site on the Internet does not disconnect the session. To ensure security and privacy of information, sign out and disconnect, or close the browser when finished with your session.

Refer to the *System Administrator Home Page* section for information on using the Select Role feature and administrator Dashboard.

Announcements

Upon login, the home page displays a welcome message and any general announcements. You can set up announcements to display on the administrator, substitute, and employee home page.

Performing Search Queries

The system performs the following search queries:

- Employee name search
- Priority List search
- Substitute searches for the classification, general classification, general, and other substitute lists.

Name Lookup search queries utilize "starts with" processing. This query can be submitted from the Profile Inquiry, Create Absence/Vacancy, Job Inquiry, Job Modify, and Priority List search pages.

Example: Search by last name:

The last name of 'Rose' is entered in the Last Name field. The Results list will contain names that begin with 'Rose,' in ascending alphabetical order by last name and first name.

Search results:

Rose, Abby
Rose, Brian
Rose, Todd

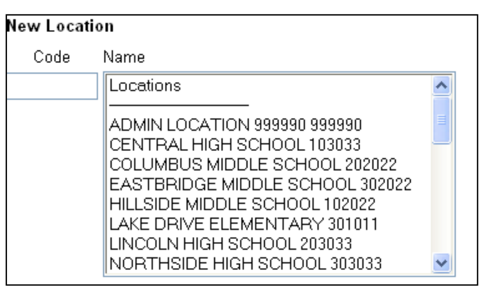
Rose Arnette, Sophia
Roseblue, Larry
Rosecrantz, Taylor
Rosen, Samuel

Displaying Locations

The display of the *Location* field throughout the system is based on the parameter, "*Search Locations by Name Lookup.*" Either a location pull-down menu or the *Location Search* button will be visible on screens.

Location pull-down menu

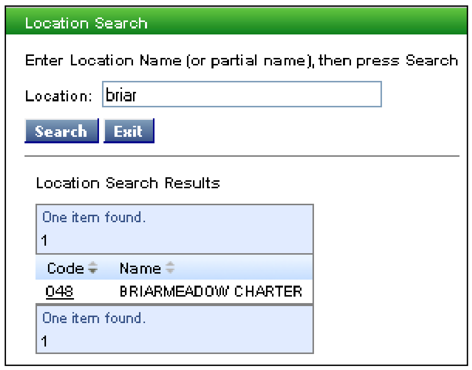
The location pull-down menu lists all of your authorized locations/location groups.



Location Search button

Some screens may contain a *location search* button. On these screens, you can enter the location code, if known, or click the *Location Se*arch button to search for a location by name.

When you click the *Location Search* button, the Location Search screen is displayed. Enter the name or partial name of the location and then click *Search*. The results of your location search are displayed. Click on the **Code** link to review information on the location.



Drop-down List Search

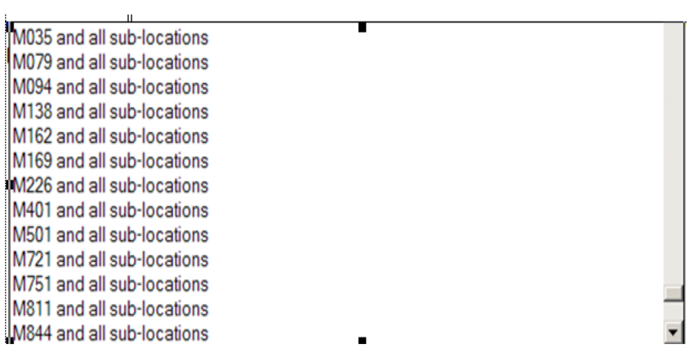
Multiple-character navigation has been added to all district-defined drop-down lists. System drop-down lists for Reasons, Locations and Classifications for example, can be very lengthy. Multiple-character navigation provides users with the ability to type multiple characters in a drop-down list field to quickly search and locate items.

Note: *Fields that allow for multiple selections from the list do not include this dropdown behavior (i.e., adding classifications to a Substitute profile).*

Using Multiple-Character Navigation

The following example illustrates how multiple-character navigation works. In this example, the user is searching for item M169 to enter into the Location Group field.

Sample drop-down list:



User Input and result:

Field input	Result
User types M	Drop-down list displays the first item in the list that begins with M,--**M035** and displays the remaining items that begin with M under it
User types 1	Drop-down list displays **M138** in cursor focus, with remaining M1 items listed after it
User types 6	Drop-down list displays **M162** in cursor focus, with remaining M1 items listed after it
User types 9	Drop-down list displays **M169** in cursor focus. M169 is displayed in the field for the final selection

The highlighted item in the list can be selected for input using the Tab or Enter key.

To navigate to another point in the list, backspace to clear entries from the search field.

Creating Reports

You can create formatted reports if you have the Adobe Acrobat Reader installed on your computer. Reports are previewed in Adobe Acrobat Reader. SmartFind*Express* screens that allow the creation of a report have a **Create Report** button the screen.

The Adobe reader toolbar includes the following options. Position the mouse over an icon without movement to display the tool tips or help information.

Exiting the Adobe Acrobat Reader

The Adobe Acrobat reader may open a second window to display the report. This is dependent on which browser you are using. If you have a separate window that is displaying the report, close the window. If the report is displaying within the browser window, press the browser's *Back* button.

Support for Additional Languages

SmartFind*Express* Web and IVR functions are offered in three languages: English, Spanish and French. If your district is configured for more than one language, a separate selection list for each language can be created. Selection lists are the choices contained in dropdown lists on the web and voiced lists on the IVR, such as the list of absence/vacancy reasons. The web drop-down lists are entered through the System Configuration menu in SmartFind*Express* and the voiced lists are recorded through the SmartFind*Express* IVR.

Selection Lists

Each language enabled in the system can have a separate selection list:

- SmartFind*Express* Web: Drop-down lists are presented in the language selected by the user when the user logged into the system (referred to as the 'session' language).
- SmartFind*Express* IVR: Voiced lists are played to the user in the language selected in their system profile.

NOTE: *If separate lists are not defined, the lists for the district's default language will be used.*

Web:

Drop-down lists for the SmartFind*Express* Web can be defined for each language for the following system data:

- Budget code (field label)
- Calendar names
- Certifications
- Classifications
- Classification Groups
- Dates
- Locations
- Location Groups
- Reasons

System reports for the entities listed above will also display multiple languages, if defined.

IVR:

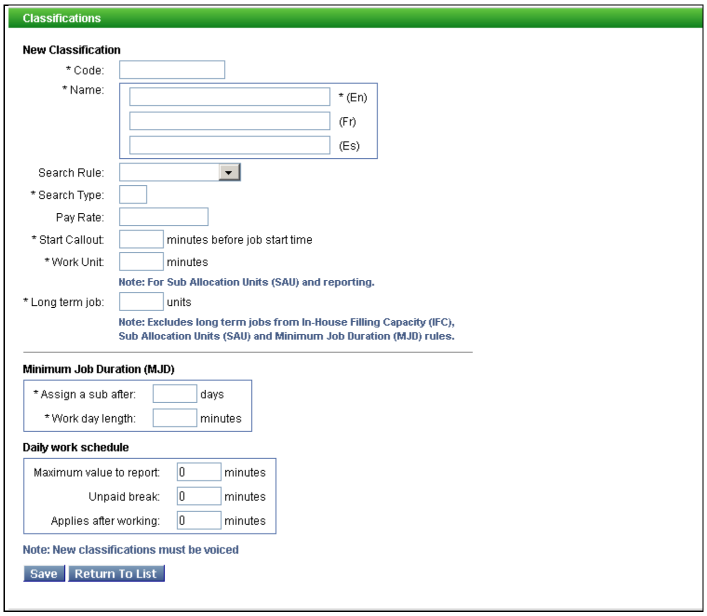
Voiced selection lists for the IVR can be defined for each language for the following system data:

- Calendar names
- Classifications
- Locations
- Absence/Vacancy Reasons
- Decline Reasons

Labels for Multiple Languages

If a district is configured for multiple languages, System Configuration pages associated with adding, modifying or deleting reference data will include labels for additional languages.

The Name field on new/modify pages will contain labels for multiple languages if a district uses more than one language. The district default language will top the list of languages displayed and is further identified by an asterisk next to the language abbreviation.


Classifications

New Classification

* Code:
* Name: * (En) (Fr) (Es)
Search Rule:
* Search Type:
Pay Rate:
* Start Callout: minutes before job start time
* Work Unit: minutes
Note: For Sub Allocation Units (SAU) and reporting.
* Long term job: units
Note: Excludes long term jobs from In-House Filling Capacity (IFC), Sub Allocation Units (SAU) and Minimum Job Duration (MJD) rules.

Minimum Job Duration (MJD)

* Assign a sub after: days
* Work day length: minutes

Daily work schedule

Maximum value to report: 0 minutes
Unpaid break: 0 minutes
Applies after working: 0 minutes

Note: New classifications must be voiced

Save | Return To List

The optional display of ‘Name’ field labels is shown on the following screens:

- Classifications
- Classification Groups
- Calendar
- Date
- Certification
- Location Group
- Location Profile
- Absence/Vacancy Reasons

Administrator Menu

The Administrator menu provides quick access to the tools you need to manage job, administrator, employee, and substitute information for your location(s). As an administrator, you can enter absences for employees, create vacancies, and review job information for your authorized location(s). You can also manage priority lists, create announcements, and view and update profile information. The following table provides a brief description of the features available from the Administrator menu.

Feature	Description
Announcements	Create and access announcements for your authorized location.
Create Absence	Enter an absence for an employee. Employees should be encouraged to enter their own absences, but there may be times when an employee is unable to perform this task.
Create Vacancy	Report vacancies by entering vacancy information, confirming the vacancy, and obtaining the job number.
Daily Job Count	Obtain the number of jobs per day for a selected reason and location.
Job Inquiry/Reports	Search for job detail information, print various job reports, and export job information.
Location Balances	View the allocation and remaining balances for location restrictions. Substitute allocation units and in-house filling restrictions limit substitutes that can be used for a given period at your location.
Priority Lists	Create and use Priority Lists in order to control the order in which substitutes are called.
Profile Inquiry/Reports	Search, review, modify, print, and export information on groups of employees, substitutes, and administrators. Create reports based on search results. **Note:** *Only system operators can access administrator profiles.*
Profile New	Create profiles with one or multiple roles: administrator, employee, and substitute. It is recommended that a profile be created for each person that will access the system. **Note:** *Only system operators can create administrator profiles.*
Absence Approval	Some absence reasons can be configured to require administrator approval before the absence can occur. The Absence Approval option provides access to absence approval requests, historical information on approval requests and enables administrators to approve/deny requests, search for requests and create Absence Approval reports.

Announcements

Overview

Operators and Administrators can access announcements for their authorized locations if their profile allows access to this menu item. Only operators can view and modify announcements for administrators, employees, substitutes, the welcome screen, and "all users" messages.

If there is a language choice, announcements are applicable only to the language you have selected. Administrators can view and modify announcements for their authorized locations.

The Sign-In screen displays a welcome message and "All Users" announcements. Separate announcements are available for administrators, employees, and substitutes and display by clicking the Home tab for each type of personnel accessing the system. The home tab is the default screen that personnel view when successfully logging into the system.

When announcements are modified, the operator should review those changes by exiting the system and then signing in again. Clicking the **Home** link displays all announcements for administrators, employees, and substitutes.

The administrator or operator, in addition to creating the announcement on the Web, must voice telephone announcements. Announcements are played on the telephone when the system calls substitutes and when personnel call the system. The telephone plays announcements as follows:

On substitute call-out:

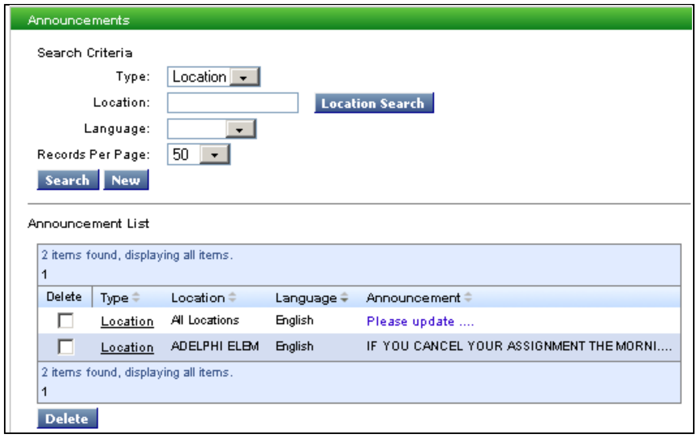
- After the PIN is entered, the "all users" message and the substitute message are played.
- Location and location group announcements are played for the job's location.

When personnel call in:

- After the PIN is entered, the "all users" message is played.
- If an active administrator, the administrator message will play. Any location or location group announcements are played.
- If an active employee, the employee message will play. Any location or location group announcements are played.
- If an active substitute, the substitute message will play. When reviewing or searching for available jobs, announcements for the job's location are played.

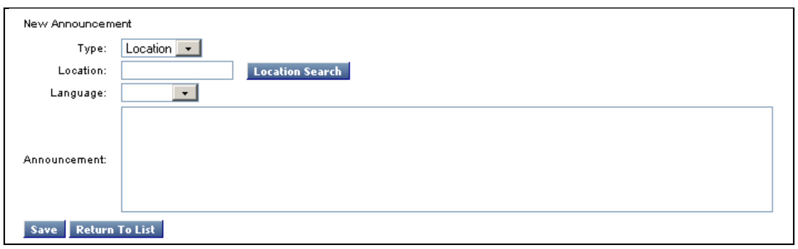
Using the Announcements Screen

This screen allows you to view, add, modify, or delete announcements. The list of announcements is displayed when you access the screen. Another way to display all announcements is to leave the fields on the screen blank and click *Search*. To display a specific type of announcement, choose the search criteria and click *Search*.



Adding Announcements

On the Announcements screen, click *New*. The New Announcement screen is displayed. Complete the announcement settings and click *Save* to add the announcement.



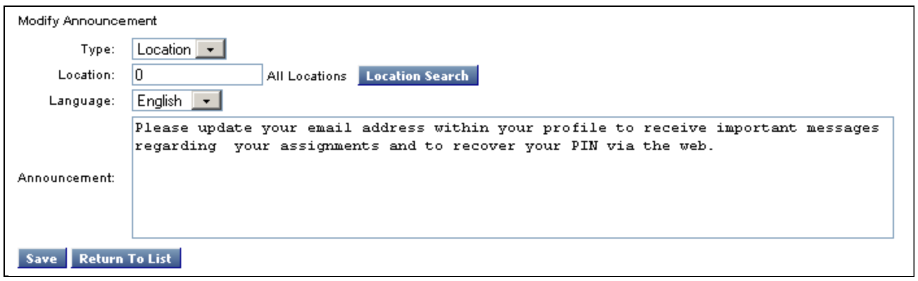
Field Name	Description
Type	The pull-down menu lists the types of announcements that you can create. The types are: Welcome, All Users, Substitute, Employee, Administrator, and Location. **Note**: *Administrators will only be able to select Location announcements. Operators can select any announcement.*
Location	When "Location" is selected as the *"Type,"* the location field displays on the screen. The location pull-down menu lists all the locations and location groups for which the announcement message is authorized.
Language	The pull-down menu lists the languages that are enabled for your system. The default language is the language set up at login. The options are English, French, and Spanish.
Announcement	Type in the message you want to display. 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. Some examples are: <i> start italics </i> end italics start bold end bold <u> start underline </u> end underline eSchool Solutions (To enter a hyperlink that will launch in a new window)

Modifying or Deleting Announcements

You can modify and delete announcements.

To *modify* announcements:

On the Announcements screen, click the **Type** link in the list for the announcement you want to modify. The Modify Announcement screen is displayed. Update the desired fields and click *Save*.



To *delete* announcements:

On the Announcements screen, click the deletion box next to the announcement(s) you want to remove and then click *Delete.*

Create Absence

Overview

There are two options to creating a job: creating an absence and creating a vacancy. An *absence* is a job where an employee is away from their work location. A *vacancy* is a job for which no employee is absent, but a substitute is needed.

Parameter settings determine if an absence can be entered when a substitute is *not* required. This allows the system to be used for both tracking of employee benefits (sick days, vacation days, salary, etc.) and finding and paying substitutes. Parameter settings also determine if administrators can report vacancies.

Job information includes the absence information associated with the employee, or vacancy information and the assignment information associated with the substitute. Employees are the only system users who can be absent. Substitutes are the only system users who can be assigned to an absence or vacancy. A substitute is assigned for the duration of the job.

Job Numbers

A *job number* is generated upon entry of the absence or vacancy. This same job number is provided to the substitute upon acceptance of the job. The job number serves as confirmation for successful entry and acceptance of a job. The job number is not heard on the telephone or displayed on the Web until all required information is entered.

When creating a job, the job number notifies the creator of the successful entry of the job.
This same job number plays to callers reviewing job information for that absence or vacancy.

During substitute and employee training, the importance of obtaining a job number should be emphasized. If the job number is not obtained, the absence has not been recorded, or the substitute has not been assigned to the job.

Job Statuses

As jobs are processed, a status is displayed that indicates the current condition of that job. A job's status determines what job information can be modified and what actions can be performed on that job. The following table provides a description of status and subsidiary status conditions that can apply to a job.

Status	Description
Open	Open jobs are jobs that occur today, or in the future, and are not filled, meaning that a substitute is required and no substitute is assigned yet. The primary function of the system in the morning is to make calls on open jobs for that day.
Active	Active jobs are jobs that occur today, or in the future and have a substitute assigned. No substitute required jobs are considered active because no further action must be taken by the system. A job can change from active to open status if a substitute's assignment to the job is cancelled and another substitute is not immediately assigned to that job.
Finished	Finished jobs are jobs that occurred in the past. A job becomes finished when the end time of the job is reached or if the parameter, "*Delayed time to Finished Jobs*" has a time and that time has been reached. Finished jobs display as one segment or record for each workday included in the absence, while Open and Active jobs display one record for the absence period. Each segment will have the same start and end date. For example, an absence three days in length will display in three finished records once completed. **Note:** *Different segments of the same job may have different assigned substitutes, different reasons, and/or different budget codes. Some segments of a given job may be assigned to substitutes, while others are not. This situation will only occur if changes have been made to finished jobs.* Finished jobs are saved in the database until the number of days indicated on the Parameters - Configuration tab. (Generally, a year or more.)
Cancelled	Cancelled jobs are jobs that no longer need to be on the system. Cancelled jobs can be past, present, or future jobs. One reason to cancel the job is if an absence does not need to be reported, such as a cancelled or postponed workshop or conference the employee was scheduled to be absent from work to attend. Employees, administrators, and operators can cancel jobs. **Note**: *Cancelled jobs are different from cancelled assignments. A cancelled assignment is a record of a substitute who accepted or was assigned to a job, but cancelled and is no longer working the job. Substitutes cannot cancel jobs.* Cancelled jobs are saved in the database until the number of days indicated on the Parameters - Configuration tab.
Verified	Only finished jobs can be verified. Once a job is verified, an administrator can no longer modify it and any changes to the verified job will have to be made by the system operator.
Stopped	Operators or administrators can stop open jobs for callout. Once they are stopped, there will be no further calls to substitutes and substitutes cannot call or log in and accept the job.

Subsidiary Status	**Description**
Open	A substitute is not assigned to the job. It is awaiting callout.
Not Filled	The system has reached the end of the search rule for the classification of the job and no substitute is assigned; no further calls will be made for this job until callout begins or the administrator reopens the job.
Web Substitute Search	A substitute on the Web searched for available jobs and accepted this job.
IVR Substitute Search	A substitute on the IVR searched for available jobs and accepted this job.
NSR – Filled In-House	The system could not assign a substitute to this job because of the “In-House Filling Capacity” for the absent employee’s location. The job will be filled using in-house personnel instead of a substitute.
NSR – Exceeded Sub Allocation	The system could not assign a substitute to this job because the Substitute Allocation Units for the absent employee’s location have been exhausted during the period of the absence.
NSR –Minimum Job Days	The system could not assign a substitute to this absence due to the “Minimum Job Days” setting for the absent employee’s classification; the length of the job was not long enough to justify having a substitute for this position.
NSR –User Request	The system could not assign a substitute to this job because the employee has indicated that a substitute is not required for the job.
NSR –No Sub Allowed	The system could not assign a substitute to this job because of the “No Sub Allowed” setting for the absent employee’s classification.
NSR – No Sub Required Day	The system could not assign a substitute to this job because the days were setup in the calendar as “no substitute required days.”
Admin Assigned	The administrator has assigned the job to a substitute from the job modification screen.
IVR - Assigned	A substitute has been assigned the job when the IVR called to offer them the job.
IVR – Answering Machine	The system has left the job assignment on a substitute’s answering machine.
Prearranged	The system will not contact any substitutes for this job; a substitute was assigned when the job was created.
Auto Assign	The job was filled from the automatic assignment list for the location and classification of the job.

Specifying a Substitute

When a substitute is required, options on the Parameters – Jobs tab and Parameters – Administrator tab determine how and when a substitute can be specified. The following table lists the parameters that impact this process.

Option	Description
Check Daily Availability	If this parameter is enabled on the Parameters – Jobs tab and a substitute is required, the profile of the requested substitute is checked by the system to see if that substitute is available for the job. The system checks the substitute's profile and prevents the substitute from being requested if unavailable. If the substitute is unavailable, the system indicates that the substitute cannot be requested because the substitute is unavailable during the time of the job.
Check the Do Not Use List	If this parameter is enabled on the Parameters – Jobs tab and a substitute is required, the Do Not Use list is checked when a substitute is specified. This applies to job creation by an employee, administrator, or operator. The system checks the Do Not Use list and prevents the caller from requesting a substitute that is on a location's Do Not Use list.
Check if Registered	If this parameter is enabled on the Parameters – Jobs tab and a substitute is required, a substitute can be specified only if registered in the system. If the substitute is not registered, they cannot be specified.
Allow only if job classification is in profile	It you are an administrator and this option is enabled on the Parameters – Jobs tab, only substitutes who have this classification in their profile are displayed on the list.
Allow only if job location is in profile	It you are an administrator and this option is enabled on the Parameters – Jobs tab, only substitutes who have this location in their profile are displayed on the list.
Allow specifying a substitute by name	If you are an administrator, and this option is enabled on the Parameters – Administrator tab, the *Name Lookup* button will be visible for you to search for substitutes by name. Search results display substitute name, access ID, call back number, registration and certification status, and indicates if the substitute is willing to work at this location for this classification.

When a substitute is specified, the system always performs the following checks:

- Is substitute?
- Is active?
- Is not expired?
- Is not already assigned?
- Is available for new jobs?
- Substitute work units are not exceeded?

The Job Override Function

There are conditions when an absence cannot be created as entered. When this occurs, the administrator or operator can use the job override function to create the absence as entered.

The job override function is always available for operators. It is only available for an administrator if the *Allow Job Overrides* option is checked on their profile. If, in creating the absence, the system determines that a job override is required to create the absence, a message displays under the screen title informing you that the absence could not be created and the reason why it could not be created. You have the option of clicking the *Override* or "*Yes"* button to create the absence, or making corrections to the absence information. The following table describes the reasons why an override may be required to create an absence.

Reason for Override	Description
The job will be created as No Substitute Required	▪ In-house filling capacity (IFC) is not met. ▪ Minimum job days (MJD) are not met. ▪ Substitute allocation units (SAU) are exceeded.
The job will be created as Auto Assigned	▪ An automatic substitute is available.
The Specified Substitute cannot be assigned	▪ The substitute does not have the location in their profile. ▪ The substitute does not have the classification in their profile. ▪ The substitute is not registered. ▪ The substitute is temporarily unavailable. ▪ The substitute is not available for new jobs. ▪ The substitute does not have daily availability for the job. **Note:** *Validations are performed for the specified substitute based on setting on the Parameters – Job tab.*
The job will not be created due to Max Absences	The reason has exceeded the location's limit on the number of absences that can be reported on any day.
The job will not be created due to Reason Balances	The reason balance for this employee and absence reason is at zero.

Using the Create Absence Screens

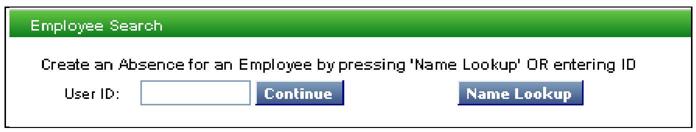
Employees should be encouraged to enter their own absences. However, there may be times when an employee is unable to do so. The administrator for the employee's location may enter the absence on their behalf. The system operator may also enter the absence.

There are three major steps to creating a job:

- Selecting the employee
- Entering absence information
- Confirming the absence and obtaining the job number.

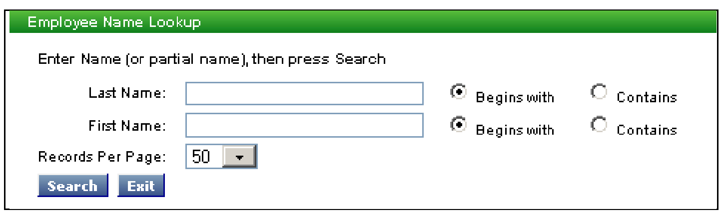
Selecting the Employee

Select the employee to be absent by clicking the **Create Absence** link. The Employee Search screen is displayed. Enter the employee's Access ID or click *Name Lookup* to search for the employee by name.

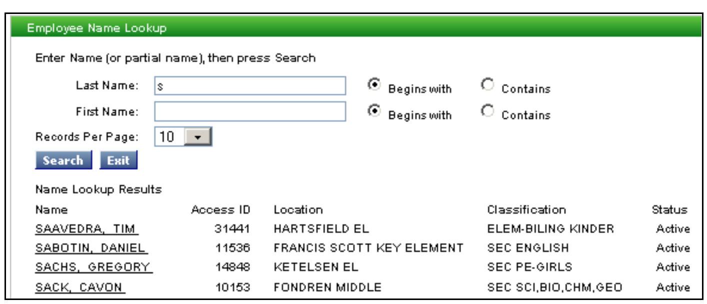


If you enter the employee's Access ID and click *Continue*, the Create Absence screen is displayed.

If you click *Name Lookup* to search for an employee by name, the Employee Name Lookup screen displays. The easiest search method is to enter the first few letters of the employee's last name. Names in the database must contain the characters entered and do not have to start with the characters entered.



After entering the name, click *Search*. The name lookup results are displayed. Click on the **Name** link of the absent employee.



The Create Absence screen displays with employee information populated. Proceed with this process until a job number is created.

Completing the Create Job Form

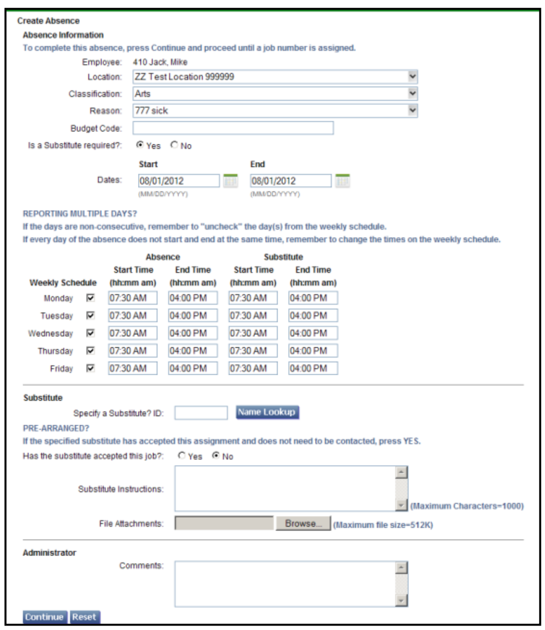
The Create Absence screen automatically displays the weekly schedule and job start and end times for the employee. When a different selection is made for the location and/or classification, the schedule information automatically updates to show the work schedule for that location/classification.

Work schedule information for the absence can be modified by checking or un-checking the work days and by entering different job start and end times. Each workday can have a different schedule. The system supports flexible work schedules.

If separate Absence and Substitute times are used, Start/End Time fields will display for both sets of times. When there are separate times for Absence and Substitute, a time modification to Absence Start Time will automatically reflect on Substitute Start Time. Similarly, a time modification on Absence End Time will automatically reflect on Substitute End Time. Substitute times can be modified to different times.

> **Note:** *If Unpaid Break periods are set up for any classifications, Unpaid Break fields will appear after the start/end times fields for those classifications with defined unpaid break periods.*

Complete the absence information and then click *Continue*. If all information is entered correctly, the Create Absence Confirmation screen is displayed. If any errors are encountered, a system message displays and you are prompted to make corrections.



Field Name	Description
Employee	The absent employee's name and Access ID.
Location	Location is a pull-down menu. The employee's primary location is displayed. **Note:** *If the employee has multiple locations or classifications on their profile, and the absence is being reported for a different location or classification other than the primary location or classification, use the appropriate pull-down menu to change the location and/or classification of the job. Only the locations on the selected employee's profile will appear in the Location pull-down menu. Only the classifications on the selected employee's profile for the selected location will appear in the "Classification" drop down menu.* **Note:** *If 'Use Itinerant Schedule' is enabled on the employee profile, all locations and classifications will be visible on the pull-down menu. The work schedule and times are obtained from the primary location/classification of the employee profile.*
Classification	Classification is a pull-down menu. The employee's primary classification is displayed. **Note:** *If the employee has multiple locations or classifications on their profile, and the absence is being reported for a different location or classification other than the primary location or classification, use the appropriate pull-down menu to change the location and/or classification of the job. Only the locations on the selected employee's profile will appear in the Location pull-down menu. Only the classifications on the selected employee's profile for the selected location will appear in the "Classification" drop down menu.*
Reason	The pull-down menu displays absence/vacancy reasons sorted by name or code. A parameter controls the display of the reason order. Select a reason to assign to this absence. **Note:** *If "Use Reason Menus" is checked on the Parameters - General tab, the pull-down menu displays the list of reasons from the Reason menu. Operators can choose from all reasons listed; Administrators can choose from administrator and employee reasons, and Employees can choose from employee reasons only.*
Budget Code	This field displays if the reason for the absence requires a budget code, or if the parameter, '*Administrators can always enter a budget code'* is enabled on the Parameters - General tab. If the reason has been set up to "collect" a budget code, you must enter a budget code to create the job. If the parameter, '*Administrators can always enter a budget code'* is enabled on the Parameters - General tab, and a budget code is entered, it will override the default budget code that would have been assigned.

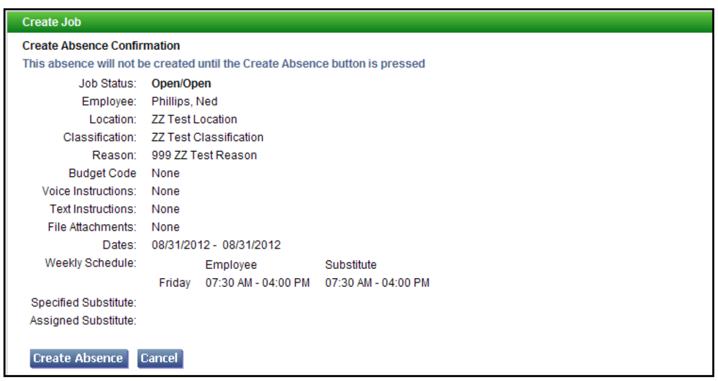
Field Name	Description
Budget Code	This field displays if the reason for the absence requires a budget code, or if the parameter, '*Administrators can always enter a budget code'* is enabled on the Parameters - General tab. If the reason has been set up to "collect" a budget code, you must enter a budget code to create the job. If the parameter, '*Administrators can always enter a budget code'* is enabled on the Parameters - General tab, and a budget code is entered, it will override the default budget code that would have been assigned.
Is a Substitute required? Yes/No	The default is Yes. To create the job without entering any substitute information so that the system finds a substitute for the job, click Yes, and then click the *Continue* button at the bottom of the screen. Otherwise, click Yes, and proceed with the process of creating the absence. If a substitute is not required to fill the absence, click *No*. The system creates the job and assigns the job number. No calls will be made by the system for this job. For example, a substitute may not be needed, on teacher professional development days, or when arrangements have been made to fill the job in-house. The choice of indicating if a substitute is required is only offered to classifications that have been set up to use a search rule that indicates a substitute could be needed.
Dates	The default for entry of an absence is today's date. To edit the dates, click the Calendar icon to display the calendar, or enter dates in the specified format. **Note**: *You cannot create an absence for workdays that are not in the employee schedule.*
Absence Times	The default is the start and end time of the selected employee. These times are taken from the *Schedule* tab of the selected employee's profile. Either the employee schedule used the location's default times, or specific times were entered for the employee. Absence times can be modified on the Create Job form. Days that do not apply to the absence can be unchecked. To modify the times and/or AM/PM indictor, click on the value and then use the up/down arrows on the keyboard. When there are separate times for Absence and Substitute, a time modification to Absence Start Time will automatically reflect on Substitute Start Time. Similarly, a time modification on Absence End Time will automatically reflect on Substitute End Time. **Note**: *If the "Allow separate Absence and Substitute times" parameter is disabled on the Parameters - Jobs page, only the Absence times will display on the Create form.*
Substitute Times	The default is the same times of the absence. To modify the times and/or AM/PM indictor, click on the value and then use the up/down arrows on the keyboard. A time modification to Absence Start Time will automatically reflect on Substitute Start Time. Similarly, a time modification on Absence End Time will automatically reflect on Substitute End Time. Substitute times cannot be set to zeros. If a substitute is not required for one day of the multiple day absence, the day must be unchecked for both the employee and substitute. A separate absence may need to be created for the day that does not require a substitute.

Field Name	Description
Unpaid Break	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. When configured, the system automatically deducts the unpaid break from the job duration time and time worked. If the "*Allow separate absences and substitute times"* system-level parameter is enabled on the Parameters, Jobs page, editable Unpaid Break fields, one for the employee classification and one for the substitute times are displayed. **Note**: *This feature applies to specific Classifications, not Classification Groups*. **Note**: *When modifying a job, administrators with "Job Modify" access on their profile will have the ability to modify the Unpaid Break value.*
Reporting Multiple Days?	If absence days are non-consecutive or if each day of the multiple-day job has different start and end times, click *Modify Schedule* to set the times for the absence. The Create Absence - Modify Times screen displays.
Specify a Substitute?	If allowed by parameter settings, you can specify a substitute for the job. After specifying, indicate if the substitute should be called. To specify a substitute, enter the substitute ID. If the ID is unknown, click *Name Lookup* to display the Substitute Name Lookup screen. Enter the search criteria and click *Search*. The substitute search results are displayed. If the substitute is unavailable for any reason, a system message displays the reason why the selection of that substitute is being prevented. If '*Allow Specifying a Substitute only if location is in their profile'* is enabled on the Parameters – Jobs tab, only substitutes who have this location in their profile are displayed. If '*Allow Specifying a Substitute only if classification is in their profile'* is enabled on the Parameters – Jobs tab, only substitutes who have this classification in their profile are displayed.
Has the substitute accepted this job?	Click "Yes" to indicate that 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.
Substitute Instructions	Instructions can be entered during job creation. The message is not limited by length and the field will scroll as information is entered. These instructions will be voiced to a substitute over the telephone.

Field Name	**Description**
File Attachments	Files can be attached to jobs. The attachment can be any file needed by the substitute or administrator, such as lesson plans, slides, or spreadsheets. Enter the name of the file or click the Browse button to select a file. Files cannot exceed the maximum per file size limit. Files are uploaded in real-time and attached to the job. Files can be deleted by clicking the “trash” icon next to the file name. **Note**: *On Job Creation, up to three attachments can be added to the job record; on Job Modify there is no limit to the number of file attachments that can be added, however, they must be added one at a time.*
Administrator Comments	Comments can be entered during job creation. The message is not limited by length and will scroll as information is entered. Comments are available for viewing whenever the job detail information is displayed. Employees and substitutes cannot view administrator comments.

Confirming the Absence

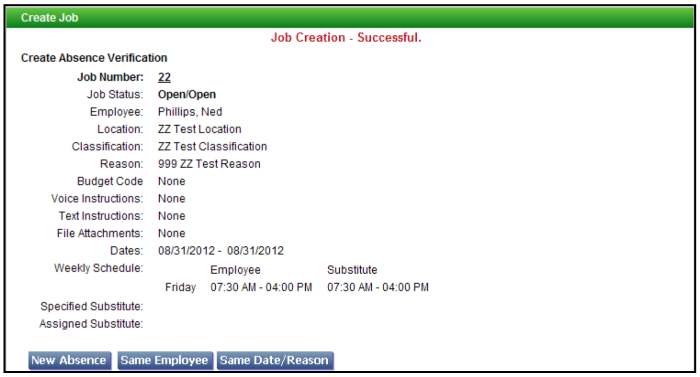
The Create Absence Confirmation screen allows you to verify that the information is correct before the job is created. Click the Create Absence button to create the job and receive a job number or click the Cancel button to return to the Create Absence screen without creating the absence. If you selected the Create Absence button, it will immediately become grayed out and disabled to prevent another ‘create’ request from being generated. The button stays disabled until the system processes the request.



The system could automatically change your absence request due to restrictions that have been set up. You may notice a job being created as *No Substitute Required (NSR)*. If so, the reason is displayed on the screen. A job could also be created as *Automatically Assigned*. A substitute can be automatically assigned if substitutes are available for automatic assignment.

Typically, the absence is created when this situation occurs.

After clicking *Create Absence*, the Create Absence Verification screen displays. A job number has been created for this absence. The receipt of a job number is critical to successfully entering an absence in the database.

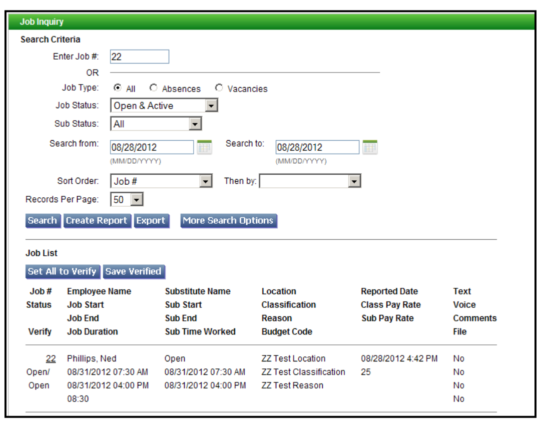


To create a different absence, create another absence for the same employee, or to create an absence for the same date and reason, click the corresponding button at the bottom of the screen.

Field Name	**Displays**
New Absence	Employee Search screen.
Same Employee	Create Absence screen pre-filled with the employee's information.
Same Date/Reason	Employee Search screen. When the Create Absence screen displays, it will be pre-filled with the previous absence date and reason.

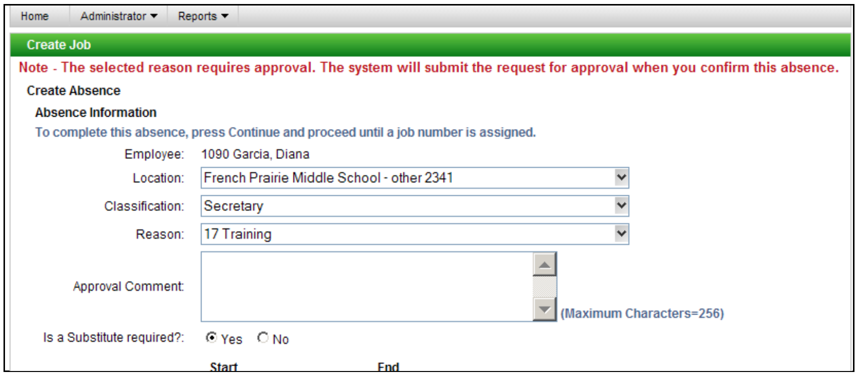
Accessing the Job Inquiry Page from the Create Absence Verification Page

The Job Number link on the Create Absence Verification page provides direct access to the Job Inquiry page for the job. From the Job Inquiry page, other job details can be viewed or modified.



Create Job –Absence Approval Feature

The Create Job form contains an additional field, Approval Comment, if the Absence Approval feature is enabled and the reason for the absence is a reason configured for absence approval. Also, if an administrator without Absence Approval permission creates an absence for a reason configured for approval, a system message is displayed at the top of the Create Job form to alert the administrator that the absence reason requires approval. Refer to the Absence Approval section for more detailed information on the Absence Approval feature.


Home
Administrator
Reports
Create Job
Note - The selected reason requires approval. The system will submit the request for approval when you confirm this absence.
Create Absence
Absence Information
To complete this absence, press Continue and proceed until a job number is assigned.
Employee: 1090 Garcia, Diana
Location: French Prairie Middle School - other 2341
Classification: Secretary
Reason: 17 Training
Approval Comment:
(Maximum Characters=256)
Is a Substitute required?: Yes No
Start
End

Create Vacancy

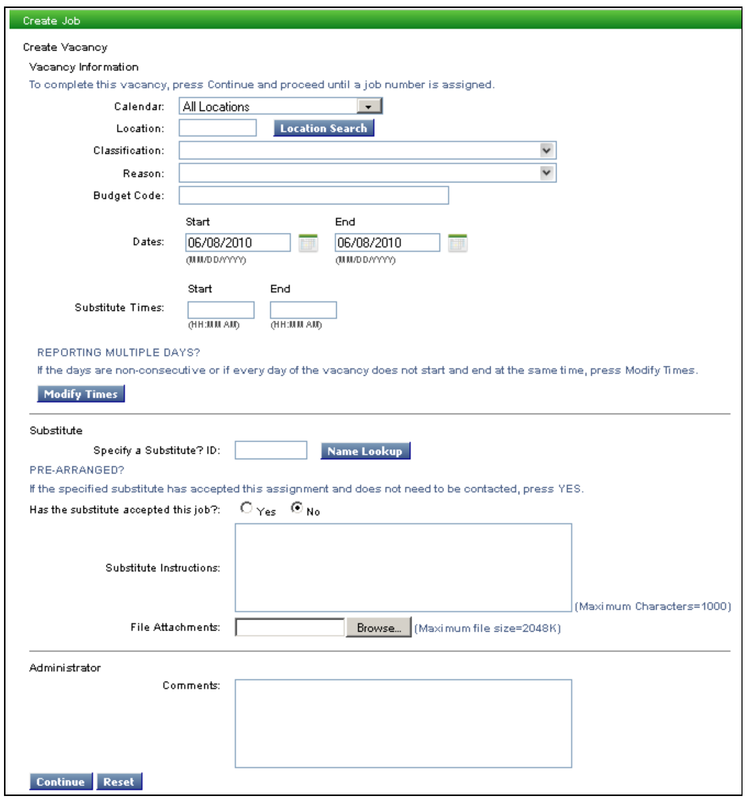
Overview

A vacancy is created when no employee exists to be absent and a substitute is needed. Settings on the Parameters - Administrator tab determine if administrators can report vacancies. There are two major steps to creating a job by entering a vacancy:

- Entering vacancy information
- Confirming the vacancy and obtaining the job number.

Entering Vacancy Information

Complete the vacancy information requested on this screen, and then click *Continue*. If all information is entered correctly, the Create Vacancy Confirmation screen will display. If any errors are encountered, the system will display an error message. Make any corrections and click *Continue* again.



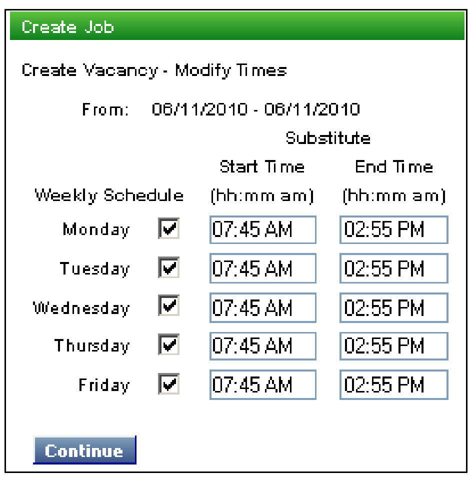
Field Name	Description
Calendar	Calendar is a pull-down menu of all the calendars that can apply to this vacancy. The "All Locations" calendar is the default. The calendar dictates the workdays, holidays, and "No Substitute Required" days that will apply to this vacancy.
Location	Location is a pull-down menu of all the locations for which this vacancy can apply. The locations that you are authorized to view will appear in the list. The start time and end time of the vacancy update immediately to correspond to the default start and end times of the location selected.
Classification	Classification is a pull-down menu of all the classifications for which this vacancy can apply. **Note**: *For positions where the substitute may be used for a variety of types of coverage, a classification such as "Roving" may have been created. This classification would be selected when entering vacancies as an indication that the substitute will not be assigned to a particular role. Special instructions are useful to the substitute when the classification is unclear as to the day's responsibilities.*
Reason	The pull-down menu displays absence/vacancy reasons sorted by name or code. A parameter controls the display of the reason order. Select a reason to assign to this vacancy. **Note:** *If "Use Reason Menus" is checked on the Parameters - General tab, the pull-down menu displays the list of reasons from the Reason menu. Operators can choose from all reasons listed; administrators can choose from administrator and employee reasons.*
Budget Code	This field only displays if the reason for the vacancy requires a budget code, or if the parameter, '*Administrators can always enter a budget code'* is enabled on the Parameters - General tab. If the reason has been set up to "collect" a budget code, you must enter a budget code to create the job. If the parameter, '*Administrators can always enter a budget code'* is enabled on the Parameters - General tab, and a budget code is entered, it will override the default budget code that would have been assigned.
Dates Start/End	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. You cannot create a vacancy for workdays that are not in the selected calendar.
Substitute Times Start/End	The default times are the same times as the location. To edit the times, all four digits of the time must be entered in hh:mm am or pm format. To modify times for the vacancy, enter the times the substitute is to report for the assignment. If the times vary for a multiple-day assignment, click *Modify Schedule*. The Create Vacancy - Modify Times screen displays. Using this screen is covered on the following page.

Field Name	Description
Unpaid Break	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. When configured, the system automatically deducts the unpaid break from the job duration time and time worked. **Note**: *This feature applies to specific Classifications, not Classification Groups*. **Note**: *When modifying a job, administrators with "Job Modify" access on their profile will have the ability to modify the Unpaid Break value.*
Reporting Multiple Days?	If the days are non-consecutive, or if each day of the vacancy has a different start/end time, click *Modify Schedule* to set the times for the vacancy. The Create Vacancy - Modify Times screen displays. Using this screen is covered on the following page.
Specify a Substitute?	If allowed by parameter settings, you can specify a substitute for the job. After specifying, indicate if the substitute should be called. To specify a substitute, enter the substitute's ID. If the ID is unknown, click *Name Lookup* to display the Substitute Name Lookup screen. Enter the search criteria and click *Search*. The substitute search results are displayed. If the substitute is unavailable for any reason, a system message displays the reason why the selection of that substitute is being prevented. Refer to the topic, "Specifying a Substitute" in the previous chapter for more information on the parameters that impact this step. If '*Allow Specifying a Substitute only if location is in their profile'* is enabled on the Parameters – Jobs tab, only substitutes who have this location in their profile are displayed. If '*Allow Specifying a Substitute only if classification is in their profile'* is enabled on the Parameters – Jobs tab, only substitutes who have this classification in their profile are displayed.
Has the substitute accepted this job?	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.

Field Name	Description
Substitute Instructions	Instructions can be entered during job creation. The message is not limited by length and the field will scroll as information is entered. These instructions will also be voiced to a substitute over the telephone.
File Attachments	Files can be attached to jobs. The attachment can be any file needed by the substitute or administrator, such as lesson plans, slides, or spreadsheets. Enter the name of the file or click the Browse button to select a file. Files cannot exceed the maximum per file size limit. Files are uploaded in real-time and attached to the job. Files can be deleted by clicking the “trash” icon next to the file name. **Note**: *On Job Creation, up to three attachments can be added to the job record; on Job Modify there is no limit to the number of file attachments that can be added, however, they must be added one at a time.*
Administrator Comments	Comments can be entered during job creation. The message is not limited by length and will scroll as information is entered. Comments are available for viewing whenever the job detail information is displayed. Employees and substitutes cannot view administrator comments.

Modifying Schedules

Use this screen to modify days of the week and times. Check the box next to the day you want to modify. The Unpaid Break field is editable. Make any updates and then click *Continue* to return to the Vacancy Information screen.

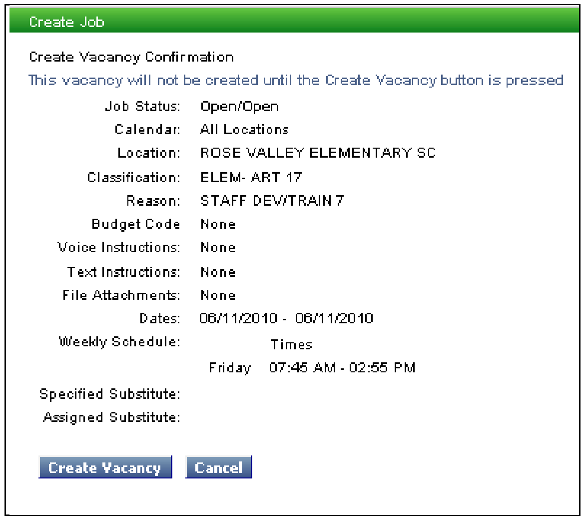


You can uncheck days that do not apply to the vacancy. For example, if the vacancy days are on Mondays and Wednesdays only, you would set the date range on the Create Vacancy screen, but to indicate it is only for 2 days a week, you would uncheck Tuesday, Thursday, and Friday on this screen. This would create the vacancy for the date range indicated on Monday and Wednesday.

This screen cannot be used to change the start or end date of the vacancy.

Confirming the Vacancy

If all information was entered correctly, the Create Vacancy Confirmation screen displays. Click *Create Vacancy* to create this vacancy.



The Create Vacancy Verification screen is displayed. A job number is created for this vacancy. The receipt of a job number is critical to successfully entering a vacancy in the database.

To create a new vacancy, or another vacancy with the same job information, click the applicable button at the bottom of the screen.

Field Name	**Displays:**
New Vacancy	Vacancy Information screen
Retain Job Data	Vacancy Information screen pre-filled with the existing vacancy information

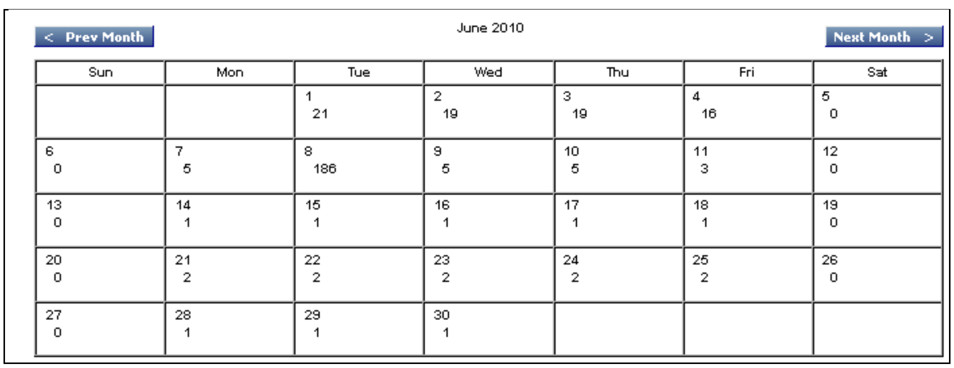
Daily Job Counts

Overview

This feature displays the number of jobs per day for a selected reason and location in calendar format. The date can be a date in the past or up to one year in the future. Daily job counts can be used to view the absence reason totals for a location. This may be helpful if using the daily job limit feature.

The Location pull-down menu displays the list of authorized locations and location groups. The Reason menu displays the list of reasons that are available. If a reason is not selected, the system displays a job count for all reasons. Click *Search* to display the calendar.

The calendar defaults to the current month and year. The next and previous buttons allow you to scroll to other months.



Job Inquiry and Reports

Overview

This feature allows you to search for job detail information, split jobs, print various job reports, and export job information. The search option available on the Job Inquiry screen allows you to search on a specific job or enter search criteria to perform job searches on multiple jobs.

Numerous inquiry reports can be created and printed using different combinations of search criteria and report setup options. Information on multiple jobs can be accessed and modified without repeating the search.

During daily activities, you might use the job inquiry feature to search for unfilled jobs, view open jobs for the day, or print reports.

The availability of job detail information is impacted by parameter settings. System parameters determine how long job information is saved and available for reporting. Once the number of days indicated in the *Number of Days to Keep Finished Jobs*, *Number of Days to Keep Cancelled Jobs*, and *Number of Days to Keep Calling Information* fields have passed, that information is no longer accessible.

Job Statuses

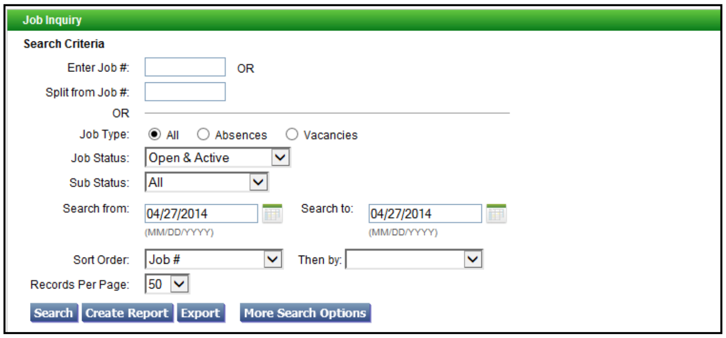
As jobs are processed, a status is displayed that indicates the current condition of that job. A job's status determines what information about that job can be modified and what actions may be performed on the job. The following table provides a description of status and subsidiary status conditions that can apply to a job.

Status	Description
Open	Open jobs are jobs that occur today, or in the future, and are not filled, meaning that a substitute is required and no substitute is assigned yet. The primary function of the system in the morning is to make calls on open jobs for that day.
Active	Active jobs are jobs that occur today, or in the future and have a substitute assigned. No substitute required jobs are considered active because no further action must be taken by the system. A job can change from active to open status if a substitute's assignment to the job is cancelled and another substitute is not immediately assigned to that job.
Finished	Finished jobs are jobs that occurred in the past. A job becomes finished when the end time of the job is reached. If the *Delayed Time to Finish Jobs* parameter on the Parameters, Configuration tab is enabled, all jobs become "Finished" when the hour specified in the parameter is reached. This parameter gives administrators the ability to modify the dates of jobs at the end of their workday. Jobs remain at *open* or *active* status until the hour entered for this parameter is reached. Finished jobs display as one segment or record for each workday included in the absence, while Open and Active jobs display one record for the absence period. Each segment will have the same start and end date. For example, an absence three days in length will display in three finished records once completed. **Note:** *Different segments of the same job may have different assigned substitutes, different reasons, and/or different budget codes. Some segments of a given job may be assigned to substitutes, while others are not. This situation will only occur if changes have been made to finished jobs.* Finished jobs are saved in the database until the number of days indicated on the Parameters - Configuration tab.
Cancelled	Cancelled jobs are jobs that no longer need to be on the system. Cancelled jobs can be past, present, or future jobs. One reason to cancel the job is if an absence does not need to be reported, such as a cancelled or postponed workshop or conference the employee was scheduled to be absent from work to attend. Employees, administrators, and operators can cancel jobs. **Note**: *Cancelled jobs are different from cancelled assignments. A cancelled assignment is a record of a substitute who accepted or was assigned to a job, but cancelled and is no longer working the job. Substitutes cannot cancel jobs.* Cancelled jobs are saved in the database until the number of days indicated on the Parameters - Configuration tab.
Verified	This status indicates that an Administrator has confirmed that the job detail information is accurate. Only finished jobs can be verified. Once a job is verified, it can no longer be modified. Any changes to the verified job will have to be made by the system operator.
Stopped	Operators and administrators can stop open jobs for callout. Once they are stopped, there will be no further calls to substitutes and substitutes cannot call or log in and accept the job.

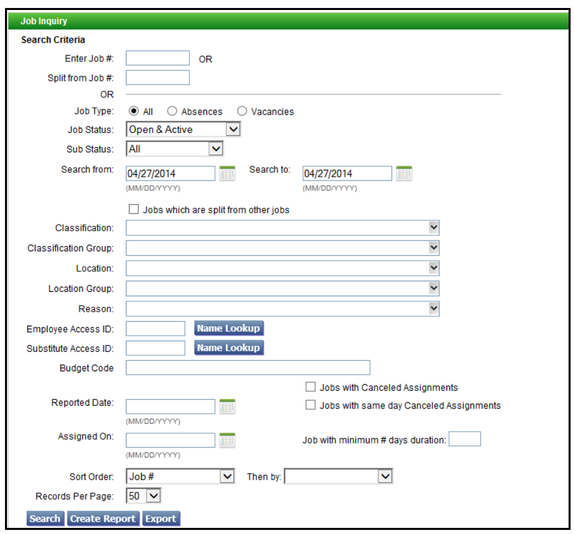
Subsidiary Status	Description
Open	The system is not currently offering this job to a substitute; awaiting callout; no substitute is assigned.
Not Filled	The system has reached the end of the search rule for the classification of the job and no substitute is assigned; no further calls will be made for this job until morning callout resumes, or the operator reopens the job.
Web Substitute Search	A substitute on the Web searched for available jobs and accepted this job.
IVR Substitute Search	A substitute on the IVR searched for available jobs and accepted this job.
NSR – Filled In-House	The system could not assign a substitute to this job because of the “In-House Filling Capacity” for the absent employee’s location. The job will be filled using in-house personnel instead of a substitute.
NSR – Exceeded Sub Allocation	The system could not assign a substitute to this job because the Substitute Allocation Units for the absent employee’s location have been exhausted during the period of the absence.
NSR –Minimum Job Days	The system could not assign a substitute to this absence due to the “Minimum Job Days” setting for the absent employee’s classification; the length of the job was not long enough to justify having a substitute for this position.
NSR –User Request	The system could not assign a substitute to this job because the employee has indicated that a substitute is not required for the job.
NSR –No Sub Allowed	The system could not assign a substitute to this job because of the “No Sub Allowed” setting for the absent employee’s classification.
NSR – No Sub Required Day	The system could not assign a substitute to this job because the days were setup in the calendar as no substitute-required days.
Admin Assigned	The administrator has assigned the job to a substitute from the job modification screen.
IVR - Assigned	A substitute has been assigned the job when the IVR called them to offer the job.
IVR – Answering Machine	During callout, the system reached a substitute’s answering machine. You will only see this status if the parameter setting in Jobs is set to “*Assign Jobs to Answering machine.”* If this parameter is activated, when an answering machine is detected, the job will be assigned to that substitute.
Prearranged	The system did not contact any substitutes for this job; a substitute was assigned when the job was created.
Auto Assign	The job was filled from the automatic assignment list for the location of the job.

Using the Job Inquiry Screen

This screen allows you to search for a single job or group of jobs, print job reports, and export job information. To display a list of all jobs in the database for today, click *Search*. To search for specific job detail information, enter any combination of the search criteria and then click *Search*. The Job list displays jobs that match the specified search criteria.



The *More Search Options* function provides additional search fields, such as location, location group, classification, classification group, reason, employee or substitute name and budget code.



The following table provides a description of each of the search fields.

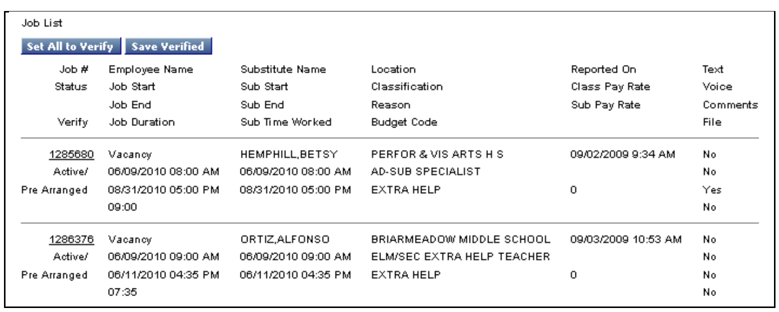
Field Name	Description
Enter Job #	The number assigned to the job when the job was created. All segments with the job number entered will appear in the search results. The search is restricted to authorized locations and location groups.
Split from Job #	The job number of the split job.
Job Type	Click in the appropriate box to indicate if you are searching on all jobs, absences, or vacancies.

Field Name	Description
Job Status	Select a job status to search on from the pull-down menu. The job status indicates the current condition of that job. Status conditions include: All, exclude canceled, All, include canceled, Open & Active, Open, Active, Finished and Verified, Finished, Verified and Cancelled. ▪ All jobs with the exception of canceled jobs are displayed in the Job List. ▪ All jobs including canceled jobs are displayed in the Job List. ▪ Open jobs are for today, but not ended, or for days in the future and a substitute has not yet been assigned. ▪ Active jobs are for today, but not ended, or for days in the future and a substitute is assigned. ▪ Finished jobs have completed. ▪ Verified jobs have completed and are marked as verified. ▪ Cancelled jobs are jobs that have been cancelled.
Sub Status	Select a sub status to search on from the pull-down menu. Jobs can have various subsidiary statuses, but have been categorized into the following three categories: All, No Sub Required, Filled and Not Filled.
Search From	Select a date range to search for jobs that started on a particular date, ended on a particular date, or occurred within the date range.
Sort Order/Then By	Select the primary *sort order* from the pull-down menu. To further define your sort, select a secondary sort order from the *Then by* pull-down menu. Sort options on both menus are Budget Code, Classification Name, Employee Name, End Date, Job #, Location Name, Reason Name, Start Date, Job Status, Job Sub-Status, and Substitute name. The default sort is by job number.
Classification Group	Select a classification group from the drop-down menu or leave this field blank. If you select a classification group, only jobs within that classification group will appear in the search results.
Classification	Select a classification from the drop-down menu or leave this field blank. If you select a classification, only jobs with that classification will appear in the search results.
Location Group	Select a location group from the drop-down menu or leave this field blank. If you select a location group, only jobs for that location group will appear in the search results.
Location	Select a location from the drop-down menu or leave this field blank. If you select a location, only jobs for that location will appear in the search results.
Reason	Select an absence reason from the drop-down menu or leave this field blank. If you select a reason, only jobs with that absence/vacancy reason will appear in the search results. For administrators and employees, only administrator reasons will display; for operators all reasons are displayed.
Employee Access ID	To search for jobs assigned to this employee only, enter the employee's access ID number. If not known, click *Name Lookup* to search for the employee by name.

Field Name	Description
Substitute Access ID	To search for jobs assigned to a specific substitute only, enter the substitute's Access ID number. If not known, click *Name Lookup* to search for the substitute by name.
Budget Code	Enter the budget code assigned to the job. The budget code can be from the employee profile, a default location budget code, or a budget code entered with a reason when the job was created.
Reported On	Searching with this date field results in displaying jobs that were reported on the date indicated.
Assigned On	Searching with this date field results in displaying jobs that were assigned to the substitute on the date indicated.
Jobs with Canceled Assignments	Check this box to search for jobs that contain cancelled assignments.
Jobs with Same Day Cancelled Assignments	Check this box to search for jobs that contain same-day cancelled assignments.
Job with Minimum # Days Duration	To search for jobs that are a minimum number of days in length, enter that number in this field. At least one day of the job must fall in the date range specified. This option applies to all statuses.

Job List

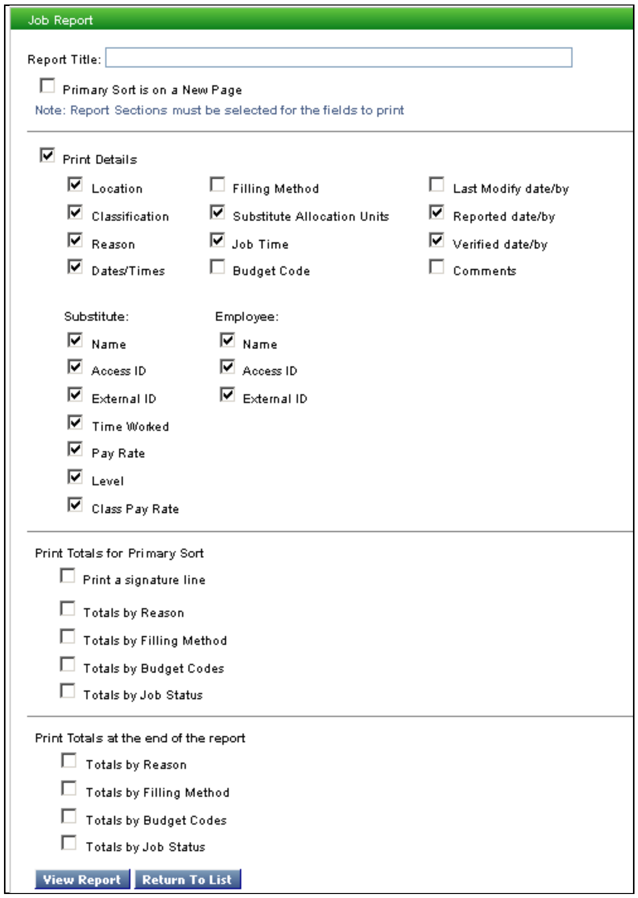
The Job List displays all jobs that match the search criteria entered on the inquiry screen. Job detail information can be reviewed and modified. Clicking on a job number displays the job detail information. Refer to the "*Viewing and Modifying Job Detail Information*" section for information on the actions you can take on a job. Numerous job reports can be created based on the job list.



Jobs on the list can be verified for accuracy. A parameter controls whether the Verify buttons display for administrators. The *Set All to Verify* option places *a* checkmark in the "Verify" checkboxes of each job. The *Save Verified* button must be pressed to update each record on the page that has a checkmark. If an error is encountered during the update process, a message displays and the page is refreshed, re-displaying checkboxes for jobs with a status of *Finished*. Checkboxes can be unchecked if the job is not to be verified. Only system operators can modify jobs with the status of "*Verified*."

Creating Job Reports

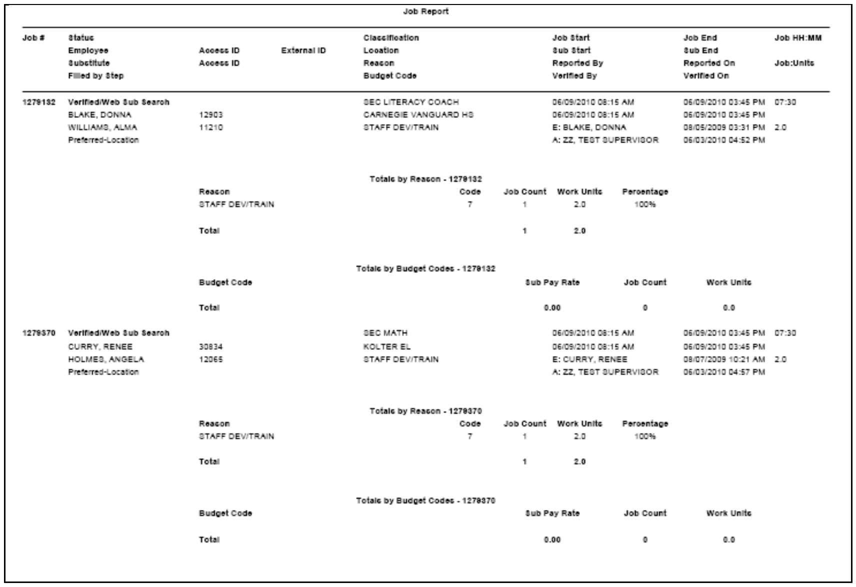
To create job reports, click *Create Report* on the Job Inquiry screen after your search has been performed. The Job Report setup screen displays. The setup screen lets you select the details to include on the report. With this level of control, you can create many different types of job reports based on your information needs. Click the appropriate box(s) to indicate the information you want to include on the report and then click *View Report* to preview the report.



Field	Description
Report Title	Name that identifies the report. The title will print at the top of each page.
Print Details	Select the job, substitute, and employee details to include in the report. Only information that is *checked* will display on the report.

Field Name	Description
Print Totals for Primary Sort	Indicate if totals for the primary sort are to be included. Select the print options and the summary information to include on the primary sort. ▪ Print Signature Line – includes information defined as the signature on the report. ▪ Totals by Reason – the number of jobs reported for an absence/vacancy reason. ▪ Totals by Filling Method – the percentage of jobs filled using a particular method. Methods include the list the substitute was on when being called and accepting a job, “Callin” (the substitute called the system and accepted the job), prearranging, and jobs entered that did not need a substitute. ▪ Totals by Budget Code – the number and duration of jobs reported per budget code. Totals are displayed for the substitute Pay Rate field (Optional Information tab, Substitute profile) per job, per budget code regardless of job status. All jobs without budget codes are totaled together. ▪ Totals by Job Status – the number of jobs reported for each job status, such as Active, Open, Finished, Verified and Cancelled.
Print Totals at the End of the Report	Indicate if totals are to print at the end of the report and the type of summary information to include on the report. ▪ Totals by Reason – the number of jobs reported for an absence/vacancy reason. ▪ Totals by Filling Method –the percentage of jobs filled using a particular method. Methods include the list the substitute was on when being called and accepting a job, “Callin” (the substitute called the system and accepted the job), prearranging, and jobs entered that did not need a substitute. ▪ Totals by Budget Code – the number and duration of jobs reported per budget code. Substitute pay rates for all jobs in the report, per budget code are displayed. All jobs without budget codes are totaled together. ▪ Totals by Job Status – the number of jobs reported for each job status, such as Active, Open, Finished, Verified and Cancelled.

The report automatically displays in the Adobe Acrobat reader. The following report sample shows the results of a report with the following job details selected: location, classification, job time, dates/time, reported date/by, verified date/by, filling method, budget code, substitute name and access ID, employee name and access ID.



Job Report

Job #	Status	Access ID	External ID	Classification	Job Start	Job End	Job HH:MM
	Employee	Access ID	External ID	Location	Sub Start	Sub End	
	Substitute	Access ID		Reason	Reported By	Reported On	Job:Units
	Filled by Step			Budget Code	Verified By	Verified On	
1279132	Verified/Web Sub Search			SEC LITERACY COACH	06/09/2010 08:15 AM	06/09/2010 03:45 PM	07:30
	BLAKE, DONNA	12903		CARNEGIE VANGUARD HS	06/09/2010 08:15 AM	06/09/2010 03:45 PM	
	WILLIAMS, ALMA	11210		STAFF DEV/TRAIN	E: BLAKE, DONNA	08/05/2009 03:31 PM	2.0
	Preferred-Location				A: ZZ, TEST SUPERVISOR	06/03/2010 04:52 PM	

Totals by Reason - 1279132

Reason	Code	Job Count	Work Units	Percentage
STAFF DEV/TRAIN	7	1	2.0	100%
Total		1	2.0	

Totals by Budget Codes - 1279132

Budget Code	Sub Pay Rate	Job Count	Work Units
Total	0.00	0	0.0

Job #	Status	Access ID	External ID	Classification	Job Start	Job End	Job HH:MM
1279370	Verified/Web Sub Search			SEC MATH	06/09/2010 08:15 AM	06/09/2010 03:45 PM	07:30
	CURRY, RENEE	30834		KOLTER EL	06/09/2010 08:15 AM	06/09/2010 03:45 PM	
	HOLMES, ANGELA	12065		STAFF DEV/TRAIN	E: CURRY, RENEE	08/07/2009 10:21 AM	2.0
	Preferred-Location				A: ZZ, TEST SUPERVISOR	06/03/2010 04:57 PM	

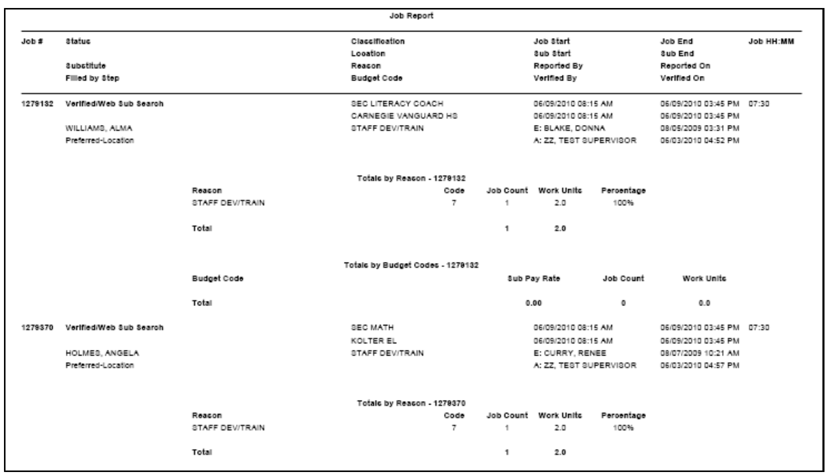
Totals by Reason - 1279370

Reason	Code	Job Count	Work Units	Percentage
STAFF DEV/TRAIN	7	1	2.0	100%
Total		1	2.0	

Totals by Budget Codes - 1279370

Budget Code	Sub Pay Rate	Job Count	Work Units
Total	0.00	0	0.0

The following report sample shows the results of a report with the following job details selected: location, classification, reason, dates/time, reported date/by, verified date/by, filling method, budget code, and substitute name.



Job Report

Job #	Status	Classification	Job Start	Job End	Job HH:MM
		Location	Sub Start	Sub End	
	Substitute	Reason	Reported By	Reported On	
	Filled by Step	Budget Code	Verified By	Verified On	
1279132	Verified/Web Sub Search	SEC LITERACY COACH	06/09/2010 08:15 AM	06/09/2010 03:45 PM	07:30
		CARNEGIE VANGUARD HS	06/09/2010 08:15 AM	06/09/2010 03:45 PM	
	WILLIAMS, ALMA	STAFF DEV/TRAIN	E: BLAKE, DONNA	08/05/2009 03:31 PM	
	Preferred-Location		A: ZZ, TEST SUPERVISOR	06/03/2010 04:52 PM	

Totals by Reason - 1279132

Reason	Code	Job Count	Work Units	Percentage
STAFF DEV/TRAIN	7	1	2.0	100%
Total		1	2.0	

Totals by Budget Codes - 1279132

Budget Code	Sub Pay Rate	Job Count	Work Units
Total	0.00	0	0.0

Job #	Status	Classification	Job Start	Job End	Job HH:MM
1279370	Verified/Web Sub Search	SEC MATH	06/09/2010 08:15 AM	06/09/2010 03:45 PM	07:30
		KOLTER EL	06/09/2010 08:15 AM	06/09/2010 03:45 PM	
	HOLMES, ANGELA	STAFF DEV/TRAIN	E: CURRY, RENEE	08/07/2009 10:21 AM	
	Preferred-Location		A: ZZ, TEST SUPERVISOR	06/03/2010 04:57 PM	

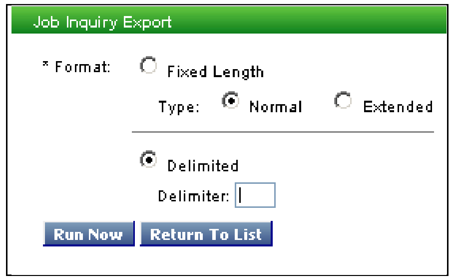
Totals by Reason - 1279370

Reason	Code	Job Count	Work Units	Percentage
STAFF DEV/TRAIN	7	1	2.0	100%
Total		1	2.0	

Exporting Job Information

The Export feature exports information on all jobs listed on the Job list. Exported information can be used in other databases or applications. Click the *Export* button after the search has been performed. The Export Jobs screen displays. Choose the format for the export and click *Run Now.* The File Download dialog is displayed.

Note: *Refer to the Export Layouts document for details on exported fields.*

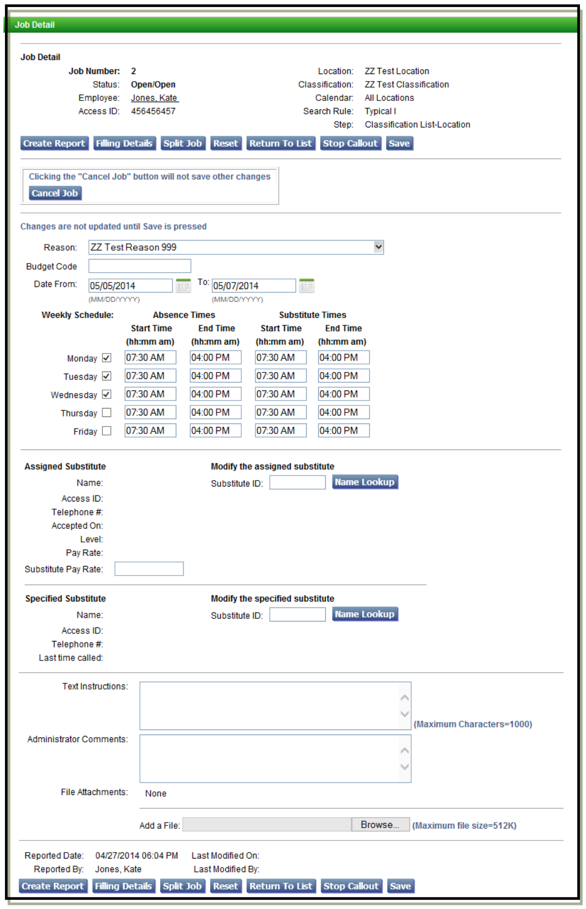


Field	Description
Format	*Fixed length* (Refers to the SEMS 3.0 formats) - select either normal or extended format. ▪ Normal - produces a text file with a record for each job in the search results. ▪ Extended - produces a text file with a longer record for each job in the search results. *Delimited (Refers to the SmartFindExpress formats)* - the default format with a	delimiter.

After selecting Run Now, follow the instructions to download the file.

Viewing and Modifying Job Detail Information

The Job Detail screen allows you to view and modify job details, create job detail reports, obtain job-filling details, split the job, stop callout on a job, and reset the job record to its default information. The job's status determines other possible job actions and which items of the job detail can be modified.



Action	Description	Job Status
Job Details	The Access ID and External ID are visible to administrators if the setting *View Employee ID* or *View Substitute ID* is enabled on the Parameters – Administrator tab. Clicking the link on the employee name, assigned substitute name, or specified name will display the profile. If the job is for a Vacancy, no employee name or Access ID displays.	Any
Create Report	Displays a report of the job details.	Any
Filing Details	Displays the job filling details.	Any
Split Job	Displays the Split Job page for splitting the job into additional job segments.	Any
Start Callout	The Start Callout button displays if the job status is *Stopped*, *Unfilled*, or *NSR* (no substitute required) *during a callout period*. Selecting this button re-opens the job for callout. **Note**: *A job status of "Stopped" indicates that someone has selected to have the call processor no longer offer the job to substitutes. If you are not the person that selected to stop callout on the job, check with the system operator before re-opening the job.*	Stopped, Unfilled, or NSR (no substitute required

Action	Description	Job Status
Stop Callout	The Stop Callout button displays for jobs that have a status of *Open* and are *currently in callout*. If the button is selected, the job status will be changed to "*Stopped*." **Note**: *Substitutes that are being offered the job, or are about to accept the job on the Web, when the Stop Callout function is selected will be informed that the job is no longer available.*	Open,
Cancel Job	This option is available on all jobs. Click *Yes* to cancel the job. If the job status is *Active*, this action releases the substitute if one is assigned to allow the substitute to accept other jobs for that date and time period. The system displays a confirm cancellation message. The job status is changed to *cancelled*.	Any
Call the Cancelled Substitute	If the job status on a cancelled job was *Active*, click *Yes* to have the system attempt to notify the assigned substitute of the job cancellation. Click *No*, if the substitute has already been informed of the cancellation or if the substitute will be notified manually of any changes made to the job by assigning, re-assigning, or canceling the substitute. The system will not place a call to inform the substitute of any changes made to the job.	Any
Verify Job	Only finished jobs can be verified. Once a job is verified, it can no longer be modified. Any changes to the verified job have to be made by the system operator.	Finished
Reason	The pull-down menu displays absence/vacancy reasons sorted by name or code. A parameter controls the display of the reason order.	
Dates	The start and end dates of the job. Dates can be modified on *Active* or *Open* jobs. If dates are modified, the appropriate days must also be checked.	

Action	Description	Job Status
Weekly Schedule	The job's times for the workdays of the employee are displayed. Days that apply to the start and end time are checked. If dates are modified, the system displays a job confirmation message that asks you to review that all of the appropriate days are checked.	
Unpaid Break	This field displays and is editable for all job statuses *if* the job's classification has an unpaid break configured for the classification. Unpaid break time is in minutes and is deducted by the system to calculate the job duration and substitute time worked.	Any
Substitute Time Worked	This information only displays for finished jobs. This field is calculated as the hours and minutes between the start and end time of the substitute. The system automatically deducts any unpaid break time from Absence times and Substitute Time worked fields. This field can be modified before the record is verified and exported for payroll purposes.	Finished Verified
Maximum Value to Report	This field displays for Finished and Verified job statuses when a maximum value to report has been configured for the job's classification. This field is not editable. This value indicates the maximum hours and minutes allowed for the substitute time worked field. When a job is being verified, the system compares the substitute time worked field to the maximum value to report. If the substitute time worked field exceeds this value: 1. If the verifier/user has Job override permission, the system will present a message for the user to choose to set the substitute time worked to the max value to report OR continue as entered and verify the job with the exceeded value. 2. If the verifier/user does not have Job override permission, the system will present a message that Substitute time worked cannot exceed maximum value to report. In this case the user must modify the sub time worked field to be equal to or less than the maximum value to report, before they can verify the job.	Finished Verified

Action	Description	Job Status
Assigned Substitute	Displays information on the assigned substitute. To modify the assigned substitute, enter the substitute ID. If the ID is unknown, click *Name Lookup* (if this option is available) to display the Substitute Name Lookup screen. If the job status is "NSR" (no substitute required), entering an assigned substitute will change the job subsidiary status to "Admin Assigned. Clicking *Save* will validate that the substitute is available for the job. If the administrator has the "*Allow Job Overrides*" function enabled on the Administrator profile the normal checks are not performed. If the Administrator does not have "*Allow Job Overrides*" (View and Modify options are OFF/unchecked), the system must perform the following checks: • NSR {IFC (In-House Filling), MJD (Minimum Job Duration), SAU (Substitute Allocation Units)} • Auto Assignment is available • Has Unavailable Period o Substitute Is Registered o Substitute Daily Availability o Substitute is not on Do Not Use list o Substitute has job location is in profile o Substitute has job classification is in profile If the Administrator has "*Allow Job Overrides*" (View or Modify option is ON/checked), the system does not perform these checks.	Any
Specified Substitute	Displays information on the specified substitute. To modify the specified substitute, enter the substitute ID. If the ID is unknown, click *Name Lookup* (if this option is available) to display the Substitute Name Lookup screen. If the job status is "NSR" (no substitute required), entering a specified substitute will change the job status on an "Active" job to "Open." Clicking *Save* will validate that the substitute is available for the job. If the administrator has the "*Allow Job Overrides*" function enabled on the Administrator profile the normal checks are not performed. If the Administrator does not have "*Allow Job Overrides*" (View and Modify options are OFF/unchecked), the system must perform the following checks:	Any

Action	Description	Job Status
Specified Substitute –	• NSR {IFC (In-House Filling), MJD (Minimum Job Duration), SAU (Substitute Allocation Units)} • Auto Assignment is available • Has Unavailable Period ○ Substitute Is Registered ○ Substitute Daily Availability ○ Substitute is not on Do Not Use list ○ Substitute has job location is in profile ○ Substitute has job classification is in profile If the Administrator has "*Allow Job Overrides*" (View or Modify option is ON/checked), the system does not perform these checks.	Any
Voice Instructions	Instructions entered on the telephone. Press the sound icon to hear the voice instructions. Voice instructions can be deleted.	Any
Text Instructions	Instructions are not limited by length and the field will scroll as information is entered. These instructions will also be voiced to a substitute over the telephone.	Any
Administrator Comments	Comments are not limited by length and will scroll as information is entered. Comments are available for viewing whenever the job detail information is displayed. Employees and substitutes cannot view administrator comments.	Any
File Attachments	Files can be attached to jobs. The attachment can be any file needed by the substitute or administrator, such as lesson plans, slides, or spreadsheets. Enter the name of the file or click the Browse button to select a file. Files cannot exceed the maximum per file size limit. Files are uploaded in real-time and attached to the job. Files can be deleted by clicking the "trash" icon next to the file name. **Note**: *On Job Creation, up to three attachments can be added to the job record; on Job Modify there is no limit to the number of file attachments that can be added, however, they must be added one at a time.*	Any

After modifying the job information, click *Save* to update the job record.

Creating Job Detail Reports

To create a Job Detail report, click *Create Report* on the Job Detail screen. The Job Detail report for the specified job automatically displays in the Adobe Acrobat reader. Fields on the report will display in the same order as fields on the screen.

If you are an Administrator, Access IDs and telephone numbers may not display if this option is disabled on the Parameters – Administrator tab.

If an Unpaid Break applies, it is displayed next to the start/end times for the work schedule and substitute schedule.

Modifying ‘No Substitute Required’ Jobs

Active and Finished “No substitute required” jobs can be modified by administrators and operators with job, modify permission on their profile. When a substitute is assigned or specified for a job with a status of ‘No Substitute Required,’ the jobs status will change as shown in the following table.

Note: *Operators can modify a Verified/NSR job; refer to the section below for details*.

Beginning Status	User Action	Status Changes to:
Active/NSR-user req, -IFC, -SAU, -MJD, or -NSR day	Press “Start callout”	Open/Open
Active/NSR-user req, -IFC, -SAU, -MJD, or -NSR day	Enter assigned sub/Save	Active/Admin assigned
Active/NSR – No sub allowed (no search rules) *See note below*	Enter assigned sub/Save	Active/Admin assigned
Active/NSR-user req, -IFC, -SAU, -MJD, or -NSR day	Enter specified sub /Save	Open/Open
Active/NSR-user req, -IFC, -SAU, -MJD, or -NSR day	Enter assigned sub AND specified sub & save	Active/Admin assigned
Finished/NSR-user req, -IFC, -SAU, MJD, or NSR day	Enter assigned sub/Save	Finished/Admin assigned
Finished/NSR – No sub allowed (no search rules)	Enter assigned sub/Save	Finished/Admin assigned
Finished/NSR-user req, -IFC, -SAU, -MJD, or -NSR day	Enter specified sub /Save	Same status, no change.
Finished/NSR-user req, -IFC, -SAU, -MJD, or -NSR day	Enter assigned sub AND specified sub & save	Finished/Admin assigned

Note: *A job with no applicable search rule is set as “NSR -no sub allowed.” A job with this status cannot be changed to Open. A substitute can be assigned to this job and the job status will change to Active.*

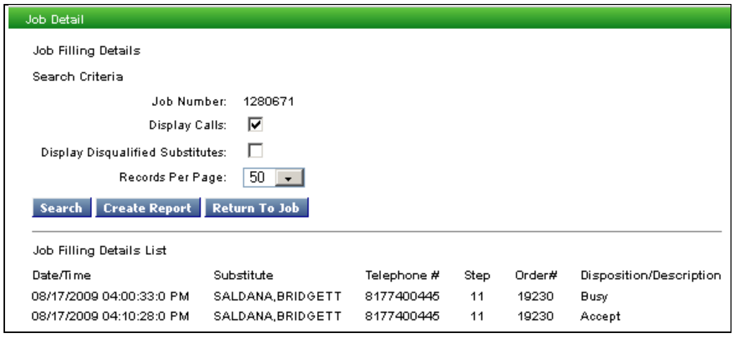
Modifying ‘No Substitute Required’ Jobs (Operators Only)

Verified “No substitute required” jobs can be modified by operators with job, modify permission on their profile. When a substitute is assigned or specified for a job with a status of ‘No Substitute Required’, the jobs status will change as shown in the following table.

Beginning Status	User Action	Status Changes to:
Verified/NSR-user req, -IFC, -SAU, -MJD, -NSR day, or –No sub allowed (no search rules)	Enter assigned sub/Save	Verified/Admin assigned
Verified/NSR-user req, -IFC, -SAU, -MJD, or -NSR day	Enter specified sub /Save	Same status, no change
Verified/NSR-user req, -IFC, -SAU, -MJD, or -NSR day	Enter assigned sub AND specified sub & save	Verified/admin assigned

Job Filling Details

Click the *Filling Details* button to display the Job Filling Details screen. This screen allows you to access the calling information on the selected job and create a Job Filling Details report. Click *Search* to display all calling information on the job, or to perform a search based on the search criteria. Search results are displayed on the Job Filling Details list.



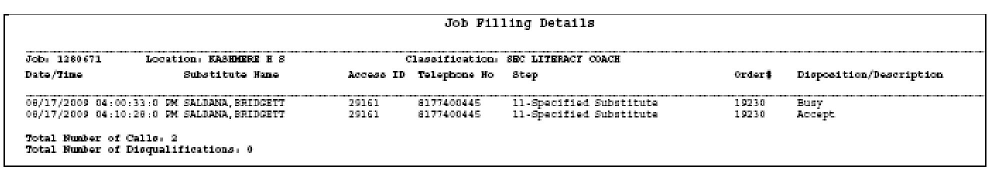
Field Name	Description
Display Calls	Calling Information is a record of all call attempts made on each job, and all job transactions made between substitutes and the system for this particular job. **Note:** *Calling information is stored for the number of days specified on the Parameters – Configuration tab.*
Display Disqualified Substitutes	This option displays each substitute that was not offered this job and the reason the substitute was not contacted. Some reasons that display include Not Registered, on a Do Not Use list that applies to this job, and disqualified from receiving additional calls during morning callout due to the Disqualify parameter settings on the Parameters – Configuration tab.

Creating Job Filling Reports

To create a Job Filling Details report, click *Create Report* on the Job Filling Details screen after the search results have displayed. The Job Filling Details report automatically displays in the Adobe Acrobat reader. Fields on the report will display in the same order as fields on the screen. If you are an administrator, Access IDs and telephone numbers may not display if not enabled on the Parameters – Administrator tab.

The total number of calls made and the total number of disqualifications are displayed at the end of the report. SCAN (Substitute Cancelled Assignment Notification) calls are not included in the total count for calls.

A sample report is provided below.


Job Filling Details

Job: 1280671 Location: KASHMERE H S Classification: SEC LITERACY COACH

Date/Time	Substitute Name	Access ID	Telephone No	Step	Order#	Disposition/Description
08/17/2009 04:00:33:0 PM	SALDANA, BRIDGETT	29161	8177400445	11-Specified Substitute	19230	Busy
08/17/2009 04:10:28:0 PM	SALDANA, BRIDGETT	29161	8177400445	11-Specified Substitute	19230	Accept

Total Number of Calls: 2
Total Number of Disqualifications: 0

Split Job

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

For Multi-day jobs, there are two Split Job options: Separate Job and Split At. These options can be applied separately or used together to split a job.

- Separate Job – This option separates a specific day(s) of the job from the original absence
- Split At – This option separates days of the job beginning from a specific day forward

When a multi-day job is split, the system displays a Split Job Preview that shows how the job will be split. Substitute assignments can be added or modified for each job segment from the preview pane.

For Single Day jobs, a time slider is used to adjust the minutes/hours of the original job to create new job segments. Moving the slider to the left reduces the job length in hours/minutes; moving it to the right increase the length of the job for the job segment. As the slider is moved, new job segments are created below the existing job segment. The slider acts as a visual cue as well as it graphically shows the beginning and end times for each job segment. Substitute assignments can be added or modified for each job segment.

Employees and substitutes receive email notification when an absence is split. Substitutes are notified when they are removed or added to a job.

The system displays various alerts before and during the Split Job process to ensure that system users are aware of the Split Job action being performed on a job. The alerts include:

- **Job Detail Page** – A Split Job Confirmation message is displayed when the Split Job button is clicked on the Job Detail page. The person initiating the split must confirm the Split Job action before the system will proceed.
- **Job Inquiry Page** – After the split is in progress, the status of the job being split is shown as Stopped/Open in the Job List.
- **Job Detail Page** – After the split is in progress, the job status is shown as Stopped/Open in the Job Detail section.
- **Job Detail Page** – During the split job process, a system message is displayed at the top of the Job Detail page to alert users of the split job action being applied to the job. The name of the person performing the job split is provided.

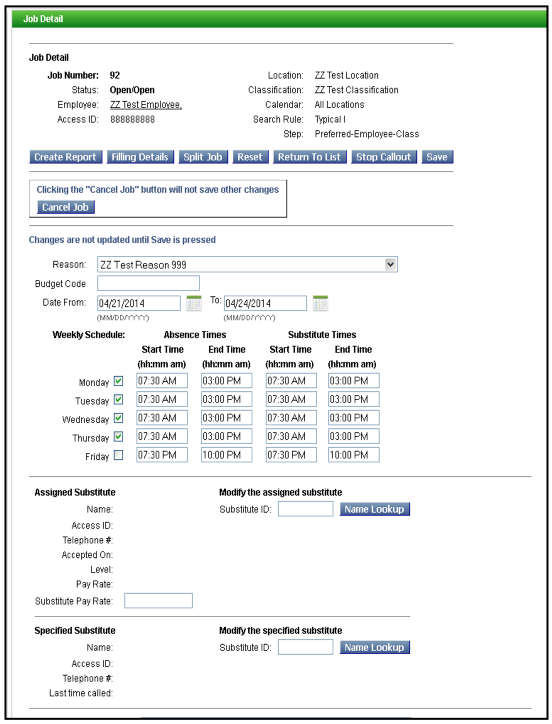
Split Job for Multi-Day Jobs

A multi-day job can be split into separate jobs using the Separate Job and/or Split At options. Substitute assignments can be added or modified for each job segment. The original job retains the job number and the new job segments created from the 'split' receive new job numbers.

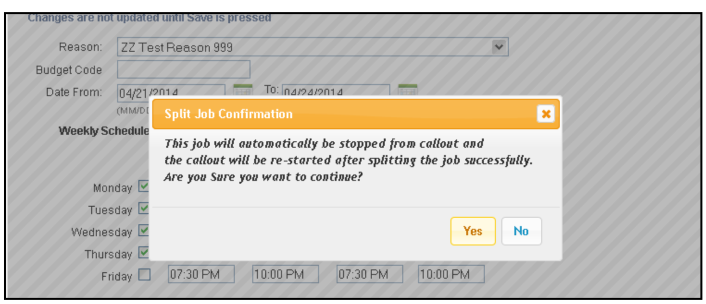
After a job is successfully split, other job specific modifications can be made to the jobs.

Job Detail - Split Job Button

On the Job Detail page, click the Split Job button.



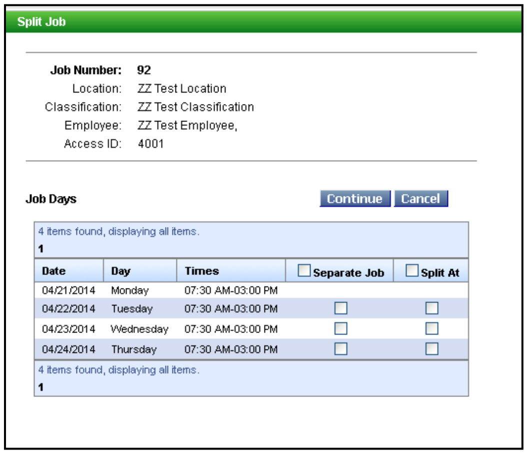
The Split Job Confirmation message is displayed. When a job is being split, it is automatically stopped from callout and restarted after the job is successfully split. To continue with the Split Job request, click 'Yes."



Split Job Page

The Split Job page is displayed after the Split Job request is confirmed. The Split Job page contains the job details and the split job options: Separate Job and Split At. The Split Job options can be applied to the entire job or to individual days of the job. The date, day and job times for each day of the job are listed in the Job Days table.

Each split job request is shown with a Split Job Preview that shows how the job will be split based on the selections made.



Separate Job Option – All Days or Individual Days

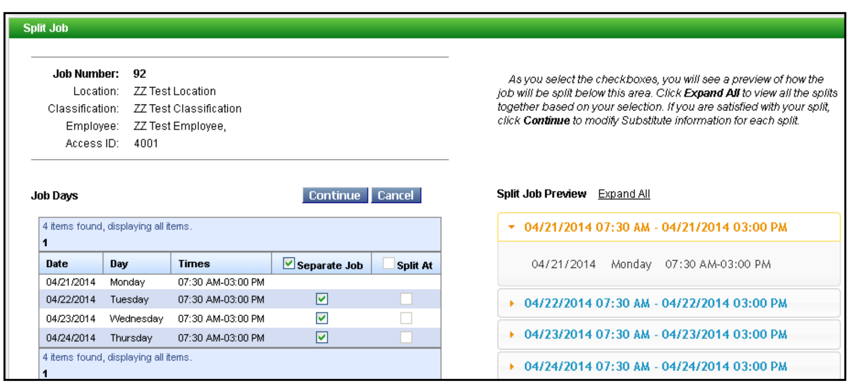
Use this option to create separate jobs for each day of the job, or for selected days of the job.

<u>Separate Job – All Days</u>

Click the 'Separate Job' checkbox in the header to automatically mark each day of the job for separation. Separate jobs are created for each day of the multi-day job.

The following Split Job Preview shows:

- 4/21 is a separate job. This job will retain the original job number.
- 4/22 is a separate job. This job receives a new job number.
- 4/23 is a separate job. This job receives a new job number.
- 4/24 is a separate job. This job receives a new job number.

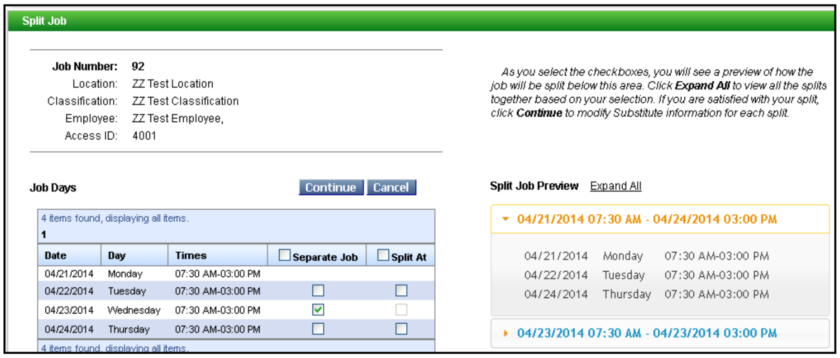


Separate Job – Individual Day(s)

Click on a checkbox in the 'Separate Job' column for the job day(s) to be separated. A separate job is created for the selected day(s).

The following Split Job Preview shows:

- 4/21, 4/22 and 4/24 is a separate job. This job will retain the original job number.
- 4/23 is a separate job. This job receives a new job number.



Split At Option - All Days or Individual Days

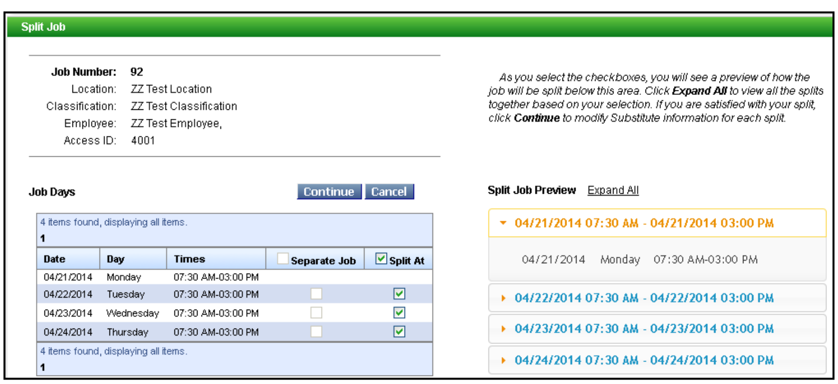
Use this option to split the multi-day job starting **from** the marked job segment, or to create a separate job starting from the marked job segment.

Split At – All Days

Click the 'Split At' checkbox in the header to automatically split each day of the job to create separate jobs. Separate jobs are created for each day of the multi-day job.

The following Split Job Preview shows:

- 4/21 is a separate job. This job will retain the original job number.
- 4/22 is a separate job. This job receives a new job number.
- 4/23 is a separate job. This job receives a new job number.
- 4/24 is a separate job. This job receives a new job number.

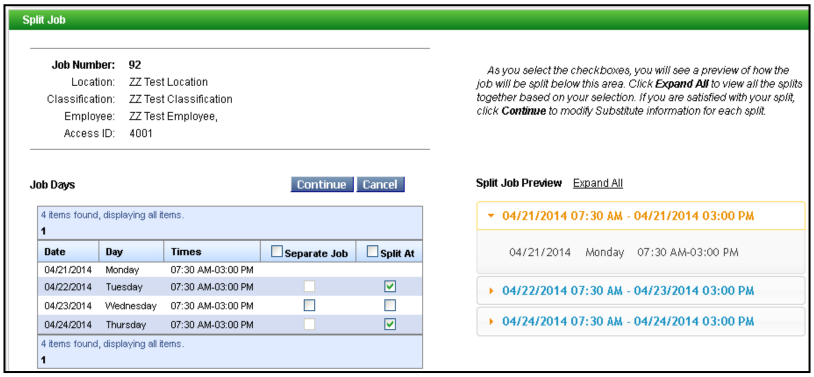


Split At – Individual Day(s)

Check a box in the 'Split At' column to mark the date that a separate job will start from. A separate job starting from that date is created.

The Split Job Preview shows:

- 4/21 is a separate job. This job will retain the original job number.
- 4/22 - 4/23 is a separate job. This job receives a new job number
- 4/24 is a separate job. This job receives a new job number.

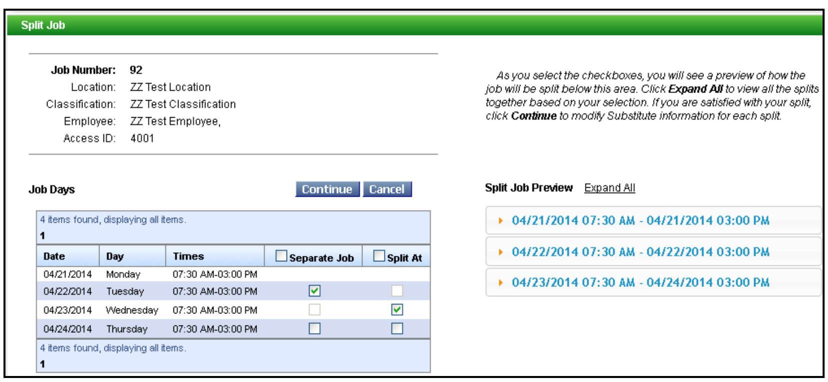


Using Both Split Job Options

The Split Job options can be used together. The multi-day job can be separated into separate jobs and split into separate jobs.

The Split Job Preview shows:

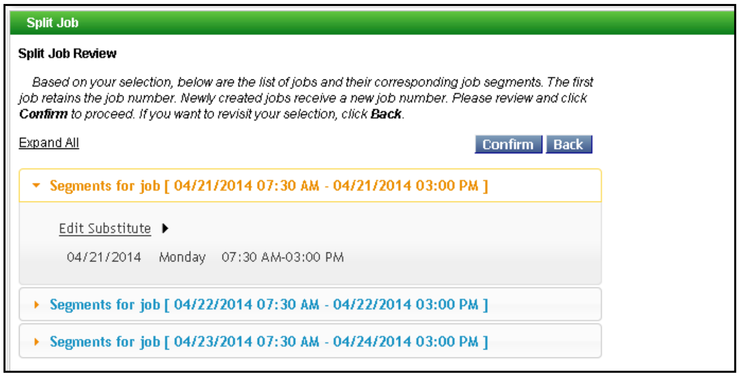
- 4/21 is a separate job. This job will retain the original job number.
- 4/22 is a separate job. The 'Separate Job' checkbox is enabled for 4/22.This job receives a new job number
- 4/23 – 4/24 is a separate job. The 'Split At' checkbox is enabled for 4/23. A separate job starting from 4/23 is created. This job receives a new job number.



After the split job selections are confirmed on the Split Job page, click the Continue button to display the Split Job Review screen.

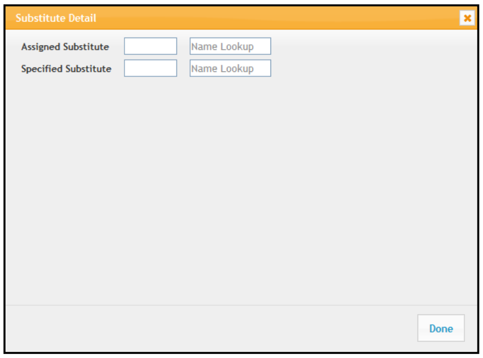
Split Job Review

The Split Job review page shows the segments for each split job. To make modifications to the Substitute assignments, click the Edit Substitute link for the job segment. The Substitute Detail page is displayed.



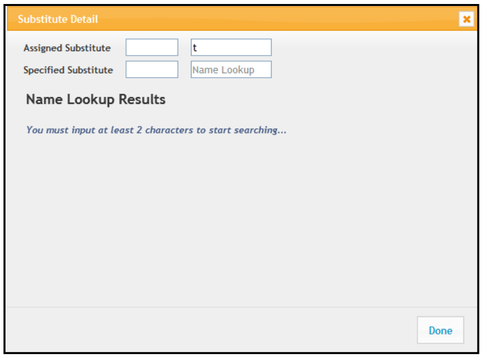
Substitute Detail

To add or modify substitute assignments, enter the substitute ID or if the ID is unknown, click Name Lookup to search for the substitute. Click 'Done' to assign the substitute to the job.

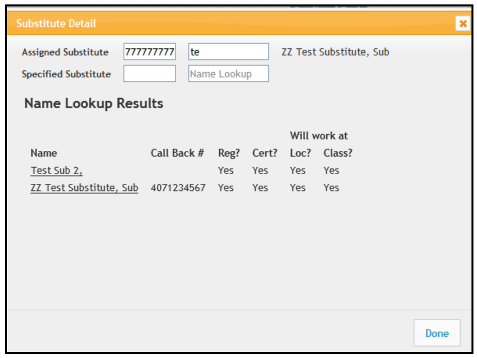


Name Lookup

At least 2 characters must be entered in the Name Lookup field to start the substitute search.



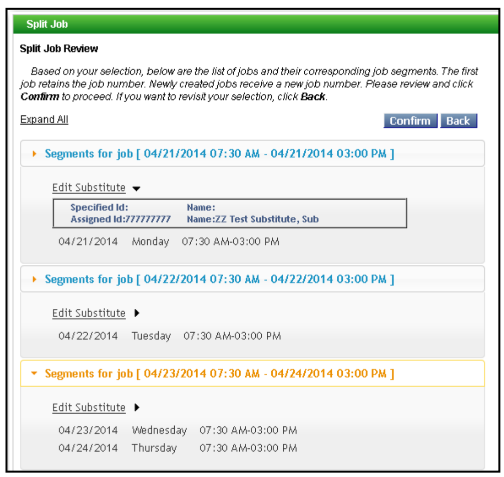
To add a substitute to the job, click on the substitute name. The substitute ID and name are added to the Substitute field



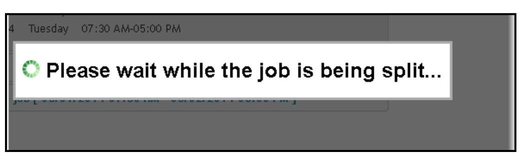
Click 'Done' to return to the Split Job Review screen.

Split Job Review –Confirm

On the Split Job Review page, the Substitute information for the job segments is displayed. If not shown, click the arrow next to the Edit Substitute link.

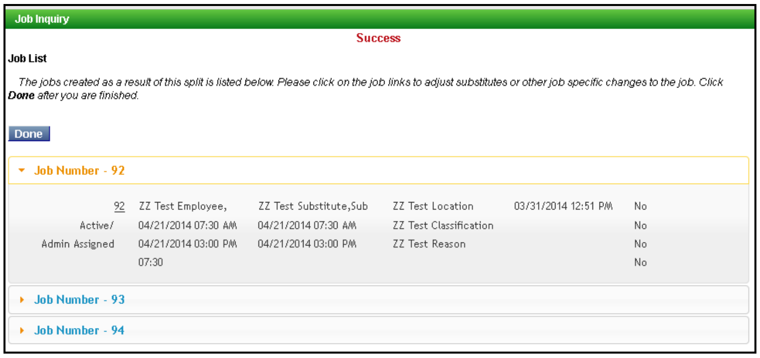


After the substitute assignments have been completed for the job segments and the job splits have been reviewed, click Confirm to have the job splits processed. The following message is displayed, "Please wait while the job is being split."



Job Inquiry Page - Split Job Success

After the job is successfully split, the Job Inquiry page for the job is displayed. All of the jobs created from the split are listed with the new job numbers. Click the arrow next to the job number to see additional job details. If no additional changes are required, click 'Done' to complete the process.

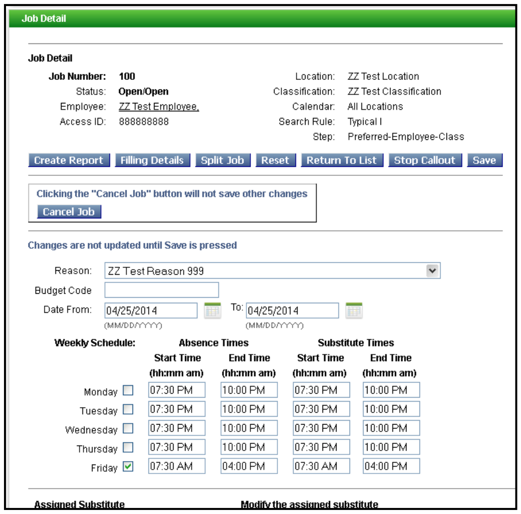


Split Job for Single Day Jobs

The hours of a single-day job can be split to create new single-day jobs. Substitute assignments can be added or modified for each job segment. The original job retains the job number and the new job segments created from the 'split' receive new job numbers.

Job Detail - Split Job Button

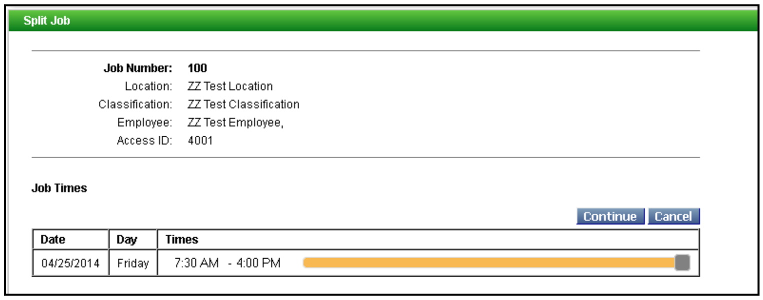
On the Job Detail page, click the Split Job button located in the Job Detail section of the page.



The Split Job Confirmation message is displayed. When a job is being split, it is automatically stopped from callout and restarted after the job is successfully split. To continue with the Split Job request, click 'Yes." The Split Job page is displayed.

The Split Job Page

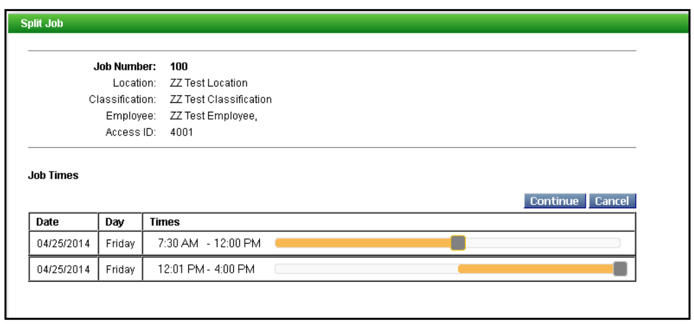
The original job can be split into one or more new jobs. The newly created jobs receive new job numbers and substitute information can be added or modified for each job. The Split Job page displays the job details and displays the job times. The time slider is used to select the hourly increments for each job.



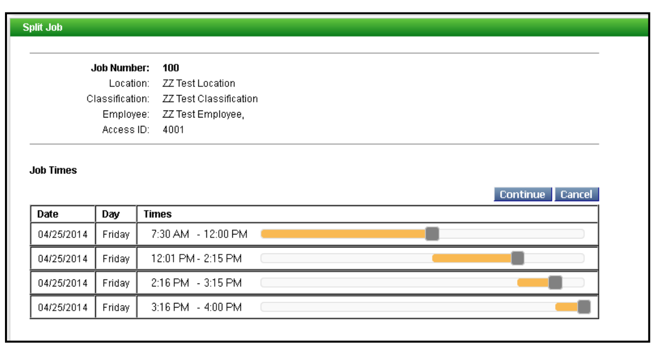
Using the Time Slider

To split the original job into multiple jobs, place the cursor on the gray square at the end of the time slider to move the slider. As the slider is moved, the start/end times for the new job being created are displayed below the existing job segment. Move the slider to the right to increase the job hours/minutes; move the slider to the left to decrease the job hours/minutes. The slider movements create the new job segments.

<u>Time slider used to create an additional job:</u>



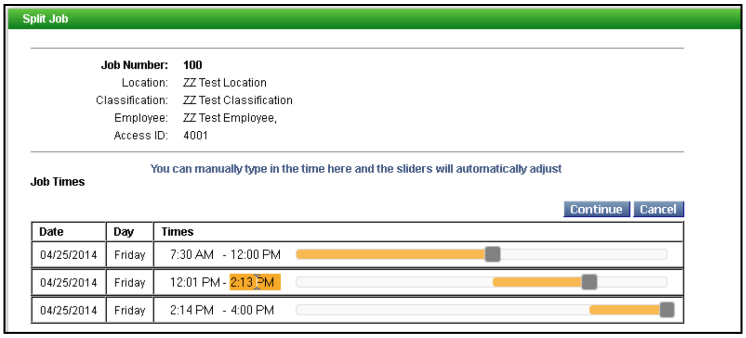
<u>Time slider used to create three additional jobs:</u>



To remove an entry, move the slider to the right to extend the job time to the end time of the previous job segment.

Manually Entering Job Times

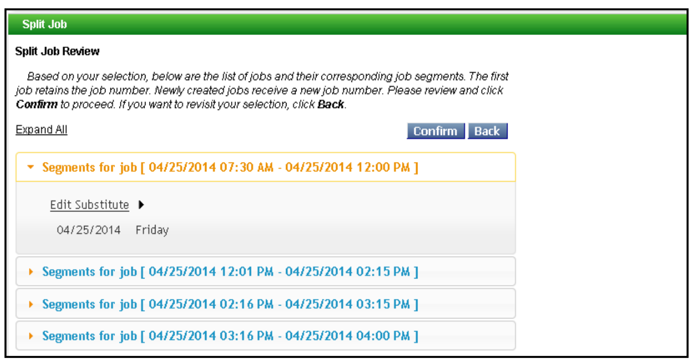
The job start/end times can also be typed into the Times fields. The slider automatically adjusts to the start/end times that are entered manually.



After the job splits are made, click the Continue button to review the changes made to the job. The Split Job Review page is displayed.

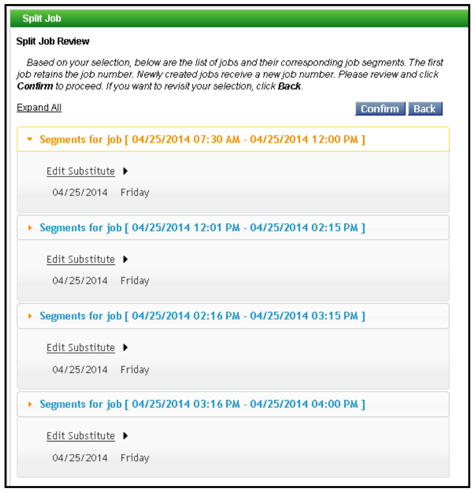
Split Job Review

The Split Job Review page lists the start/end times for each job segment. The original job retains the original job number. The newly created jobs receive new job numbers. Click the Expand All link to display all of the information for each job segment. Click the Edit Substitute link to add or modify substitute assignments.



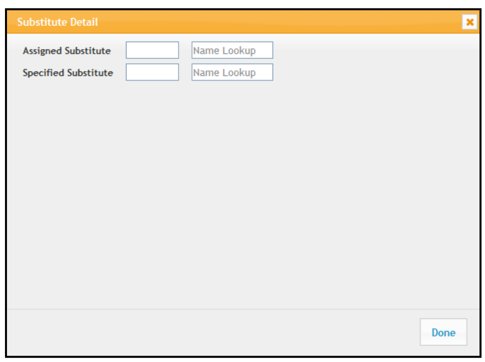
Expand All View

Click the 'Expand All' link to see all of the information for each job segment.



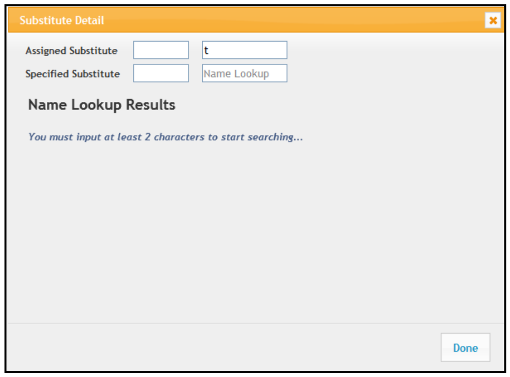
Substitute Detail Page

Click the Edit Substitute link for the job segment to add or modify substitute assignments. The Substitute Detail page is displayed. To add a substitute, enter the substitute ID, or if the ID is unknown, click Name Lookup to search for the substitute name and ID.

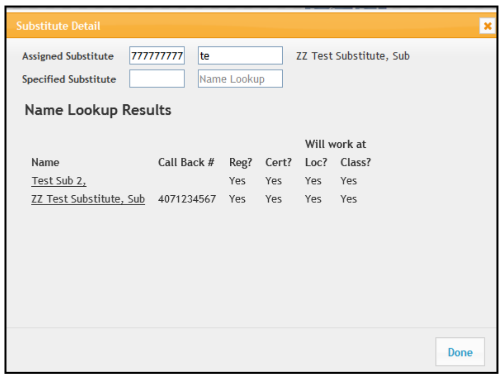


Name Lookup

At least 2 characters must be entered in the Name Lookup field to start the substitute search.



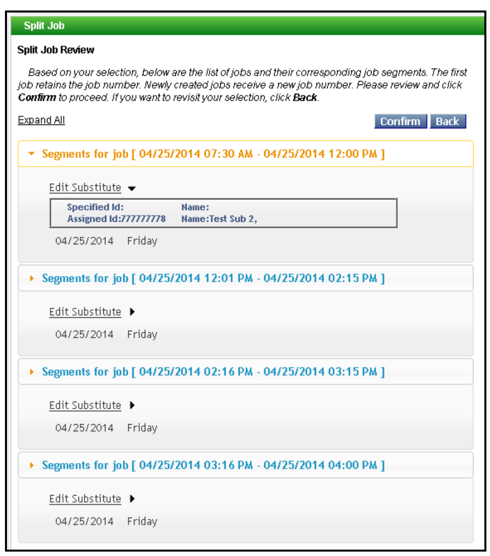
To add a substitute to the job, click on the substitute name. The substitute ID and name are added to the Substitute field



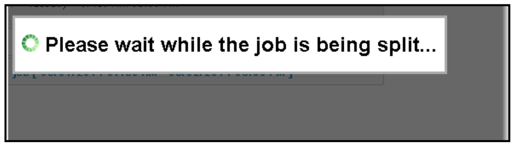
Click 'Done' to return to the Split Job Review screen.

Split Job Review - Confirm

On the Split Job Review page, the Substitute information for the job segments is displayed. If not shown, click the arrow next to the Edit Substitute link to display the information.

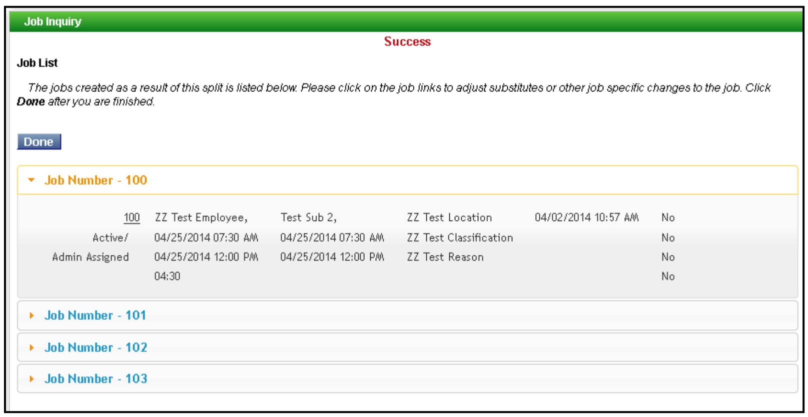


After the substitute assignments have been completed for the job segments and the job splits have been reviewed, click Confirm to have the splits processed. The system displays the following message, “Please wait while the job is being split.”



Job Inquiry Page – Split Job Success

After the job is successfully split, the Job Inquiry page for the job is displayed. All of the jobs created from the split are listed with the new job numbers. Click the arrow next to the job number to see additional job details. If no additional changes are required, click ‘Done’ to complete the process.



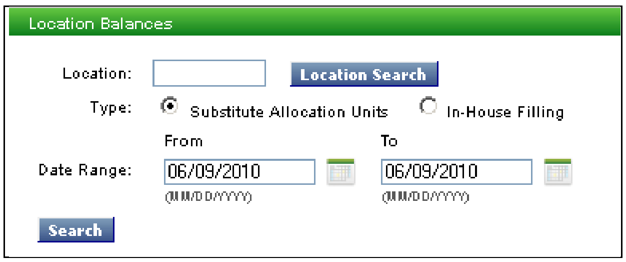
Location Balances

Overview

This feature allows you to display the balances for the substitute allocation units or in-house filling. 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. The SAU balance refers to the number of absences at a location that may be filled by substitutes during a given period. When a location reaches the limit on the units requiring substitutes for a given time period, all additional absences are reported as No Substitute Required – SAU.

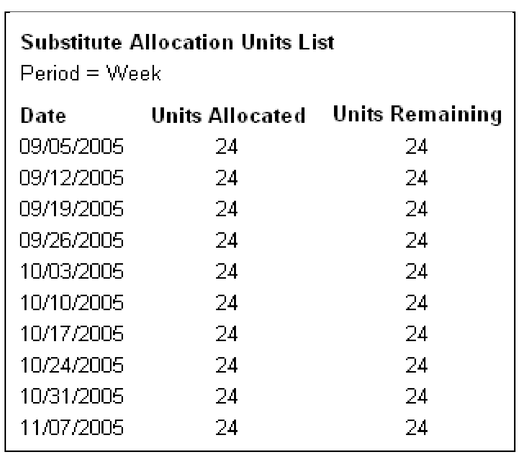
Using the Location Balances Screen

This screen displays a location's remaining SAU or IFC balance for the specified date range. After entering the search criteria, click *Search* to display either the SAU or IFC list for the location.



Field Name	**Description**
Location	The pull-down menu displays the authorized locations.
Type	Select either SAU or IFC. The SAU list displays either the daily, weekly, monthly, or yearly remaining SAU balance.
Date Range	The start and end date defaults to the current date. Click the Date icon or enter a different date in the specified format.

A sample Substitute Allocation Units list is shown below.



Substitute Allocation Units List
Period = Week

Date	Units Allocated	Units Remaining
09/05/2005	24	24
09/12/2005	24	24
09/19/2005	24	24
09/26/2005	24	24
10/03/2005	24	24
10/10/2005	24	24
10/17/2005	24	24
10/24/2005	24	24
10/31/2005	24	24
11/07/2005	24	24

This report lists on a daily basis how many units were allocated and how many remain. It also indicates in the middle of the screen what type of time frame has been indicated for the allocated units (daily, weekly, monthly, or yearly).

A sample In-House Filling list is shown below.

In-House Filling List

Daily Jobs = 1

Date	Remaining
09/01/2005	1
09/02/2005	1
09/03/2005	1
09/04/2005	1
09/05/2005	1
09/06/2005	1
09/07/2005	1
09/08/2005	1
09/09/2005	1
09/10/2005	1
09/11/2005	1
09/12/2005	1
09/13/2005	1
09/14/2005	1
09/15/2005	1

The In-House Filling list shows how many remaining IFC jobs have to be filled in-house before a substitute can be assigned to a job.

Priority Lists

Overview

Priority Lists are lists of substitutes that have been specifically created in order to control the order in which substitutes are called. Priority lists give substitutes preference over other substitutes and determine the order in which jobs will be offered either via the Internet browser, call-in, or call-out. Controlling the order that substitutes are called ensures the best-qualified substitute, according to policies, is found for each job.

Typically, substitutes on priority lists are called before their profile setup is considered. A substitute can be placed on a location, location group or an employee's Preferred list. Because employees cannot maintain priority lists, administrators and operators must maintain these lists.

Administrators can maintain preferred lists and can view Do Not Use and Automatic Assignment lists. Not all substitutes should appear on preferred lists. Only the substitutes that will be offered the job first should appear. Having many substitutes on a location's preferred lists will not improve the fill rate for the jobs. Substitutes must be assigned to either a location or an employee, but not both.

Priority lists can be created for a specific classification code or for a location or employee in general. The system typically calls lists with classifications first before lists without classifications. It is not recommend that a substitute be placed on the both a list with a classification and a list without the classification.

Priority Lists Types

Each priority list type performs specialized functions.

Do Not Use -Active and Inactive Lists

The Do Not Use list identifies substitutes who should not be offered or assigned jobs at a given location, or for a particular employee. The list applies to all standard and custom search rules and to all jobs requiring a substitute, and therefore is not a part of the search rule setup.

A Do Not Use list is either Active or Inactive. Active lists are used by the system for job processing; Inactive lists are not used by the system for processing jobs and are strictly for historical tracking of Do Not Use entries for a substitute , employee, or location,

A substitute cannot be on a location's Active Do Not Use list and other priority lists for the same location and classification at the same time. The only exception is when specifying a substitute. The ability to specify and/or prearrange a substitute is determined in the system parameters. If a caller is allowed to specify a substitute, the option "*Check the Active Do Not Use List*" can be enabled on the Parameters - Jobs tab.

If this parameter is enabled (the box is checked), the system checks the appropriate Do Not Use lists at the time the request is made. If the specified substitute's name appears, the system will not allow that substitute to be requested or prearranged.

Active Do Not Use List

If this parameter is enabled (the box is checked), the system checks the appropriate Active Do Not Use lists at the time the request is made. If the specified substitute's name appears, the system will not allow that substitute to be requested or pre-arranged.

If this parameter is disabled (the box is not checked), the system does not check the Active Do Not Use lists at the time the request for a substitute is made. The specified substitute will be called for the position even if on the Active Do Not Use list for that location or employee.

Continued

A system-generated notification letter can be printed for mailing to a substitute each time they are placed on an Active Do Not Use List. The letter is accessed from the Priority Lists page and can be modified before printing (the letter is generated in .rtf format which can be opened in a word processor).

A reason can be assigned for a substitute being put on an Active Do Not Use list. Use of these reasons is optional. The list of reasons for Active Do Not Use lists is created on the System Configuration, Reasons, Do Not Use Reasons.

If Do Not Use entries have an associated reason, the system tracks the number of times a substitute has been placed on a Do Not Use list for a specific reason (the total is made up of Active plus Inactive Do Not Use entries for the Substitute). Deleted entries (active or inactive) are removed form the reason count for a substitute.

The system will automatically send an alert email to designated Operators when a substitute reaches a threshold for number of times for a single Do Not Use reason (if configured).

Note: *Administrators who have the ability to Modify Do Not Use lists set ON in their Administrator profile can change the status of Active entries to Inactive.*

Inactive Do Not Use List

Entries on the Inactive Do Not Use list are not used by the system to determine whether substitutes qualify for jobs, but instead serve as an historical log of Do Not Use entries.

Automatic Assignment List

This list is 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.

The Automatic Assignment list is used to assign substitutes to the first jobs created for a location per day. The number of jobs assigned to substitutes from the Automatic Assignment list depends on the number of substitutes on that list. The system does not call these substitutes regarding these jobs. Instead, the substitutes must call or sign in to the system each day to learn which job(s) have been assigned to them. When a job requiring a substitute is reported, the system checks the location's Automatic Assignment list for an available substitute.

- 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.
- If no substitute is available from this list, the system creates the job as an *open* job and follows its normal procedures to locate a substitute for the job or allow a substitute to be specified or prearranged.

The Automatic Assignment list can override parameters that allow substitutes to be requested or prearranged. This is accomplished by changing the order of the search rule lists. The Auto Assignment list would be listed before the Specified Substitute list.

If a substitute is available on the Automatic Assignment list at the location of the job, the system will not consider a specified substitute if one is entered. However, the system operator can override the assignment of an automatic assignment substitute, if necessary.

Automatic Assignment List: continued t

If a substitute assigned from the automatic assignment list cancels the assignment to a job, the system automatically assigns the job to another available Automatic Assignment list substitute, unless that substitute has previously been assigned to that job. If no other substitutes are available from the Automatic Assignment list for that location, the system leaves the job open and follows its normal procedures to locate a substitute for the job.

Note: *The automatic assignment list is used before considering the in-house filling capacity of the location.*

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.

Note: *Maintaining preferred lists for employees can result in considerable data entry. If you decide to do so, it is recommended that you limit the number of substitutes allowed on the list.*

Custom List

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.

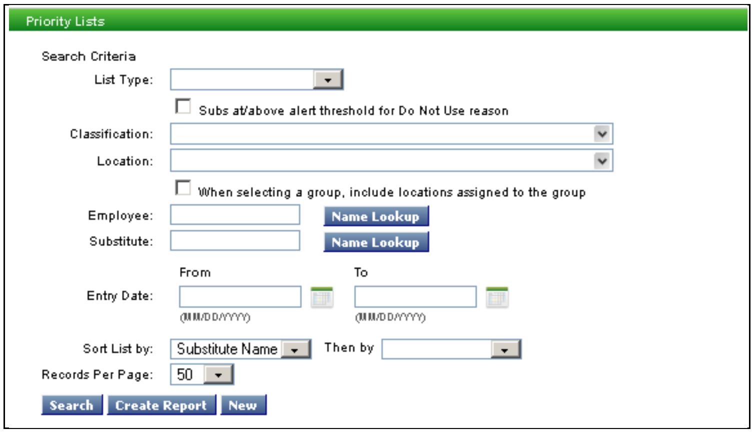
Note*: A custom list could be used to place unqualified substitutes on a list that will be called last in the search rules and after the general list.*

Using the Priority Lists Screen

This screen allows you to search, review, modify, delete, add a substitute to a priority list, and create Priority List reports.

Priority List Inquiry

The inquiry screen allows you to perform a search for all substitutes assigned to a priority list or to perform a search based on specified criteria. To search for all substitutes, leave the fields on the screen blank, select the sort order, and click *Search*. To search for specific priority lists, enter any combination of the search criteria, select the sort order, and then click *Search*. When searching on the Active Do Not Use or Inactive Do Not Use list type, the screen re-displays with a Reason drop-down field for selecting the reason.



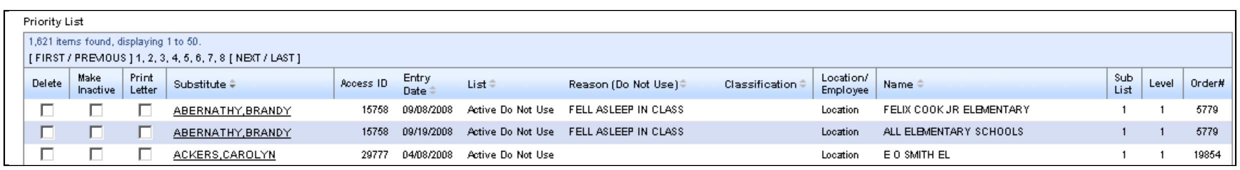
Field Name	**Description**
List Type	Select a type from the pull-down list. The options are: Preferred, Automatic Assignment, Active Do Not Use, Inactive Do Not Use and named Custom Lists. The Active Do Not Use, Inactive Do Not Use and Automatic Assignment lists are offered to administrators based on their administrative profile setup.
Reason	The Reason field displays only when the List type selected is Active Do Not Use or Inactive Do Not Use, or when the “Subs at/above alert threshold for Do Not Use reason” option is enabled. Operators and Administrators who have Modify, Do Not Use permission on their profile can associate a reason from the configured list of Do Not Use reasons when adding a substitute to an Active or Inactive Do Not Use list.
Subs at/above alert threshold for Do Not Use reason	Searches the system for all substitutes currently at the alert threshold limit for the reason selected from the Reason drop-down. Other search fields are automatically disabled when this option is selected.
Classification	The classification determines the list to which the substitute is assigned. Substitutes can be placed on a priority list for a selected classification. The priority list can be for employees, locations, or location groups. When a priority list is set up for an employee, only the employee’s classifications can be selected. A substitute can be on a priority list even if the subject and/or affected location(s) is not listed in the substitute’s profile. If no classification is selected, then the substitute will be offered all jobs for the employee, location, or location group regardless of the job’s classification.
Location	The locations in the pull-down list are the locations found in the administrator’s profile. Do not check the “*When selecting a group, include locations assigned to the group”* option if you are searching for substitutes that were assigned to a location group only. This should be checked if you are looking for substitutes that have been assigned to specific locations that belong to a location group.

Field Name	**Description**
Employee	Enter the Employee ID or click *Name Lookup* (if visible) to search for the employee by name. For administrators, the Employee ID field will not display if *View Employee ID* is not enabled on the Parameters – Administrator tab.
Substitute	Enter the Substitute ID or click *Name Lookup* (if visible) to search for the substitute by name. For administrators, the Substitute ID field will not display if *View Substitute ID* is not enabled on the Parameters – Administrator tab.
Entry Date	The date the entry was added to a priority list. **Note**: *Entries in the system prior to Release 1.5 will display their "Last Modify" date in this field.*
Sort list by	Choose the primary sort sequence for the search.
Then by	Choose the secondary sort sequence for the search.

Priority List Search

Priority List search results display the substitutes that match the search criteria entered on the inquiry screen. From the Priority List, administrators can delete priority lists, change Active Do Not Use lists to Inactive and generate notification letters to substitutes that can be mailed to inform them of their entry on an Active Do Not Use list.

Entries on the Priority List will always display the substitute's access ID for Operators. For administrators, the View Substitute ID parameter in Parameters – Administrator, Browser Access, must be enabled for the substitute's access ID to display in the results list.


Priority List

1,621 items found, displaying 1 to 50.
[FIRST / PREVIOUS] 1, 2, 3, 4, 5, 6, 7, 8 [NEXT / LAST]

Delete	Make Inactive	Print Letter	Substitute	Access ID	Entry Date	List	Reason (Do Not Use)	Classification	Location/ Employee	Name	Sub List	Level	Order#
☐	☐	☐	ABERNATHY,BRANDY	15758	09/08/2008	Active Do Not Use	FELL ASLEEP IN CLASS		Location	FELIX COOK JR ELEMENTARY	1	1	5779
☐	☐	☐	ABERNATHY,BRANDY	15758	09/19/2008	Active Do Not Use	FELL ASLEEP IN CLASS		Location	ALL ELEMENTARY SCHOOLS	1	1	5779
☐	☐	☐	ACKERS,CAROLYN	29777	04/08/2008	Active Do Not Use			Location	E O SMITH EL	1	1	19854

Make Inactive

The "Make Inactive" feature enables administrators to change any Active DNU entries to Inactive by checking the box next to the item. Active Do Not Use entries can be modified to Inactive Do Not Use; however, Inactive Do Not Use entries cannot be modified to Active Do Not Use. Inactive/Active Do Not Use entries can be deleted.

A substitute's Do Not Use reason count is determined by the total of Active plus Inactive DNU entries per Reason. Deleted DNU entries, active or inactive are not considered in this count.

Print Letter

The Print Letter feature generates a notification letter to the substitute that can be mailed to inform them of their entry on an Active Do Not Use list. A letter can be generated for every Active DNU entry listed in the search results. The letter is created in RTF format. End-users can open the letter in a word processing program and modify the text and format it as they like. The body of the letter will include the entry date of the Active DNU entry, the substitute's name and address information, the reason for the DNU entry (if there is one) and detailed information on the active DNU entry (i.e., classification, Employee Name, Location).

Entry Date

The date shown in this field is the date the entry was added to a priority list or for entries in the system prior to Release 1.5 this field will contain the system's "Last Modify Date."

Reason (Do Not Use)

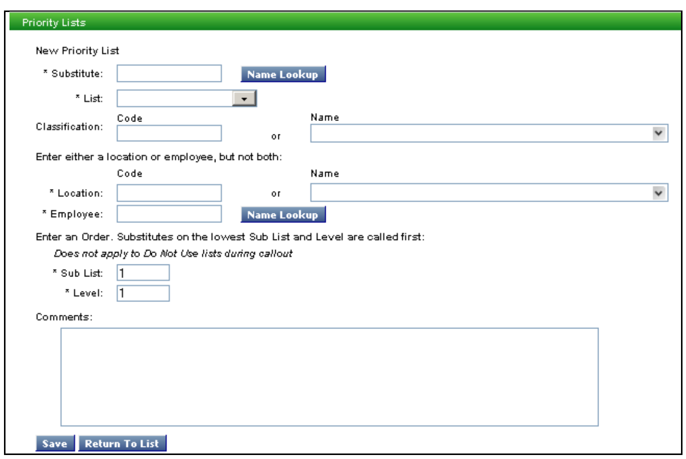
If a record does not have a reason populated, no reason will display in the Reason (Do Not Use) column for that record. The field will be blank.

Delete

The Delete action allows for any priority list to be deleted from the search results. To *delete* a substitute priority list, click the box next to the priority list you want to delete and click *Delete*.

Adding Substitutes to Priority Lists

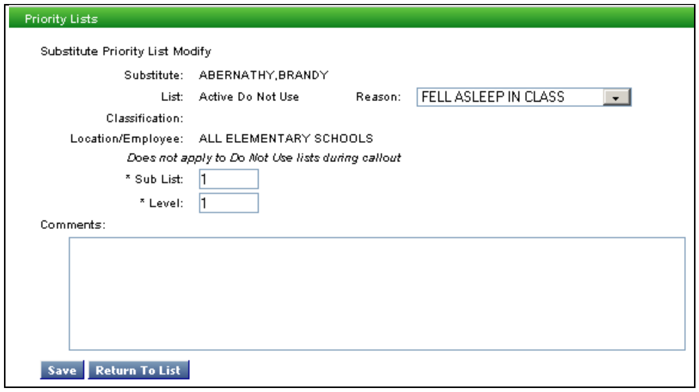
On the Priority Lists screen, click *New*. The New Priority List screen is displayed. Enter the required information on the substitute and click *Save.*



Field Name	Description
Substitute	Enter the Substitute ID or click *Name Lookup* (if visible) to search for the substitute by name. If an administrator, the Substitute ID field will not display if *View Substitute ID* is not enabled on the Parameters – Administrator tab.
List	Select a type from the pull-down list. The options are: Preferred, Automatic Assignment, Active Do Not Use, Inactive Do Not Use and named Custom Lists. The Active Do Not Use, Inactive Do Not Use and Automatic Assignment lists are offered to administrators based on their administrative profile setup.
Reason	This field only displays when the list types of Active Do Not Use or Inactive Do Not Use are selected. The screen re-displays with the Reason drop-down field for selecting a reason.
Classification Code or Name	The classification determines the list to which the substitute will be assigned. The code can be entered if known, instead of selecting a classification from the pull-down list. If a list is not entered, the substitute is considered for any classifications for the employee, location, or location group.
Location Code or Name	The locations in the pull-down list are the locations found in the administrator's profile. The code can be entered if known, instead of selecting a location from the pull-down list. ***Note****: Either a location or an employee must be entered, but not both.*
Employee	Enter the Employee ID or click *Name Lookup* (if visible) to search for the employee by name. If an administrator, the Employee ID field will not display if *View Employee ID* is not enabled on the Parameters – Administrator tab. ***Note****: Either a location or an employee must be entered, but not both.*
Sublist	A numeric value that indicates the order substitutes will be called. The substitute with the lowest number will be called first for an assignment. If multiple substitutes are on a sublist, the assigned search type will determine in what order they are called.
Level	A numeric value that indicates the order substitutes will be called within a sublist. The substitute with the lowest number will be called first for an assignment. Level can be used to indicate seniority. An 8-digit seniority date can be entered for the level, such as 20040101.
Comments	Optional informational can be added on priority lists. This field is alphanumeric and up to 256 characters.

Modifying Priority Lists

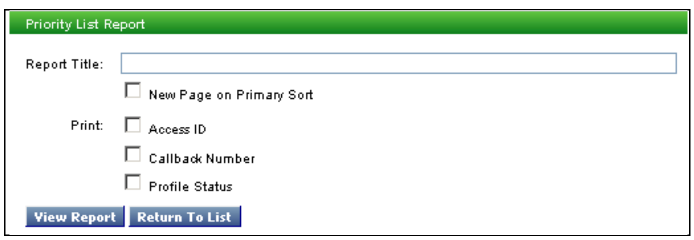
To modify the priority list information for a substitute, click on the substitute name to display the Modify screen. Update the desired fields and click *Save* to update the priority list.



If the list type of the substitute is Active Do Not Use or Inactive Do Not Use, the Modify screen will display with a Reason pull-down field for modifying the reason.

Creating Priority List Reports

To create priority list reports, click *Create Report* on the Priority Lists screen after the search results have displayed. The Priority List Report setup screen displays.



To print all search results, enter a report title, click *New Page on Primary Sort* to have the report start on a new page when the primary sort field changes, and then click *View Report*.

To print specific information from the priority lists, enter a report title, click *New Page on Primary Sort* to have the report start on a new page when the primary sort field changes, click the box(s) next to the priority list information you want included on the report, and then click *View Report*.

The report automatically displays in the Adobe Acrobat reader.

Priority List Report

Substitute	List Access ID Comments	Reason (Do Not Use) Entry Date	Type Classification	Profile Status	Sub List Level	Order Last Modify
	Active Do Not Use 857544	 03/17/2008	Location - K179 PS 179 KENSINGTON	 Active	1 1	666829330 08/24/2009 03:57 PM
ABDALLA,HANY	Preferred 2616074	 09/18/2008	Location - M084 PS 084 LILLIAN WEBER	 Active	1 1	666850476 08/24/2009 03:57 PM
ABDALLA,MARKO	Active Do Not Use 2614304	 01/05/2009	Location - Q993Q415 P993Q @ BENJAMIN N. CARDOZO HIGH SC	 Active	1 1	666833296 08/24/2009 03:57 PM
	Active Do Not Use 2614304	 01/05/2009	Location - Q993Q041 P993Q @ PS 041 CROCHERON	 Active	1 1	666833296 08/24/2009 03:57 PM
	Active Do Not Use 2614304	 01/05/2009	Location - Q993Q208 P993Q @ P.S./I.S. 208	 Active	1 1	666833296 08/24/2009 03:57 PM
	Active Do Not Use 2614304	 01/05/2009	Location - Q993Q072 P993Q @ JHS 072 CATH. & COUNT BASIE	 Active	1 1	666833296 08/24/2009 03:57 PM
	Active Do Not Use 2614304	 01/05/2009	Location - Q993Q499 P993Q @ QUEENS COLL SCH FOR MATH, S	 Active	1 1	666833296 08/24/2009 03:57 PM

Profile Inquiry and Reports

Overview

The Profile Inquiry and Reports feature provides access to the General Inquiry screen, Employee Inquiry screen, and if configured, the Substitute and Administrator Inquiry screens. This feature is used to search, review, modify, print, and export information on groups of employees, substitutes, and administrators. Many inquiry reports can be created using different combinations of search criteria and printed based on various report setup options. Information on multiple employees, substitutes and administrators can be accessed and modified without repeating the search.

Single profile searches can be performed using access ID or name, external ID, or callback number. Reports can be obtained using different combinations of search criteria and printed based on numerous report options.

The Administrator inquiry allows you to search for an administrator by location. You can modify or delete an administrator profile and create a report of administrator profiles.

The Employee inquiry allows you to search for a group of employees at one time. The search may be to print a report containing information on more than one employee, to edit several profiles at one time, or to export employee information.

You can search for employees by location, classification, registration status, expiration dates, and date types on the employee profile.

During searches, the results remain visible regardless of the number of profiles you view or modify. This allows you to perform tasks on several employee profiles with less searching.

The Substitute inquiry searches for a group of substitutes at one time. Some possible reasons for the search may be to print a report containing information on more than one substitute, to edit profiles, or to export several profiles at one time.

You can search for substitutes by location, classification, registration status, expiration dates, and by date types on the substitute profile. You can also search for substitute availability by entering specific search criteria and dates for the search.

During searches, the results remain visible regardless of the number of profiles you view or modify. This allows you to perform tasks on several substitute profiles with less searching.

Profile Inquiry

The General Profile Inquiry screen allows you to search for a profile by access ID or name, external ID, or callback number.

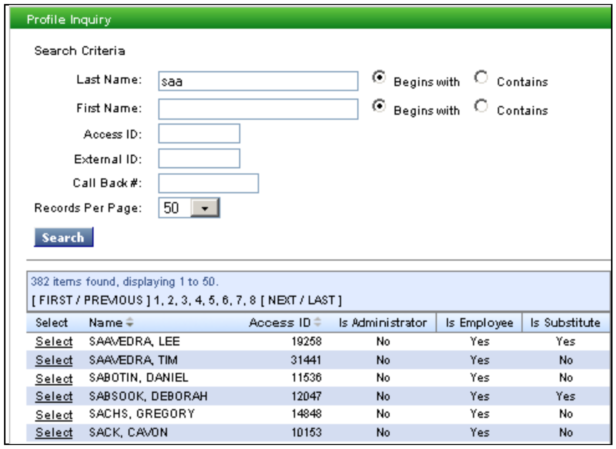
To search for a specified employee, an ID or name search should be entered. The access ID and external ID are visible to administrators if the district settings *View Employee ID* or *View Substitute ID* are enabled on the Parameters – Administrator tab.

To reset a PIN number so that the employee should re-register, check the reset indicator. The PIN can be changed if the parameter *Allow PIN Modification on Employee & Substitute Profiles* is enabled on the Parameters – General Tab. A “Registered” message will appear on the profile if the employee has registered and recorded their name with the system.

To delete a profile, click the *Delete* button. Profiles cannot be removed if there is job data in the system. You will be asked to confirm the deletion.

When searching for a substitute, the callback telephone number is visible if the district setting *View Substitute Phone Nu*mber is enabled on the Parameters – Administrator tab.

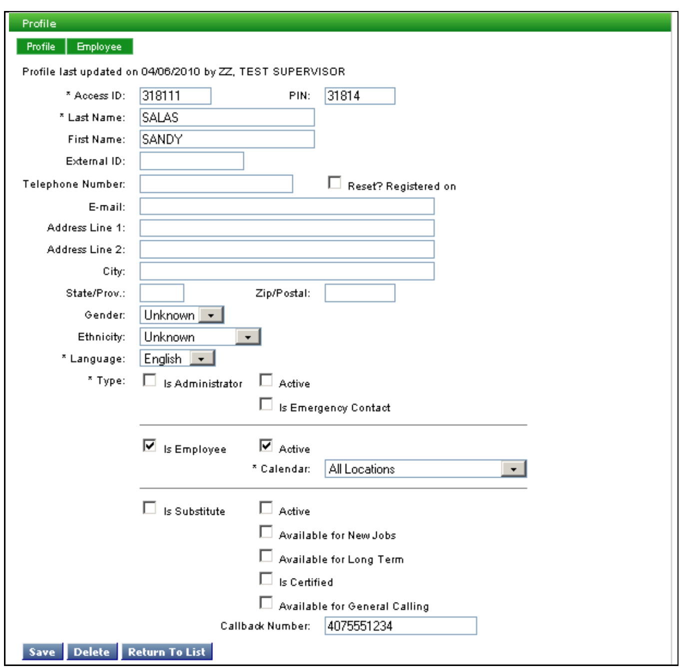
After entering the desired search criteria, click *Search*.



If multiple profiles exist that match the search results, a list of profiles is displayed. Search results can be sorted (ascending/descending order) by clicking on the up/down arrows in the Name, Access ID and Web User ID columns.

NOTE: *The Web User ID field will not display if the district is not configured to use this field for SmartFindExpress web login.*

When a profile is selected, the Modify Profile screen is displayed for that user.



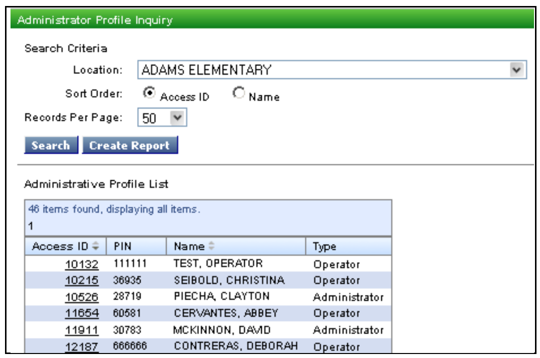
Profile information can be viewed or updated depending on the administrative setup of the administrator or operator. With modify access, a profile can be modified or deleted. For detailed information on modifying profiles, refer to the "*Profile New*" chapter for procedures and field descriptions.

Administrator Inquiry and Reports

Note: *Although information on administrator inquiry and reporting is included in this chapter, only system operators have access to administrator profile setup and maintenance.*

Operators are the only type of users that can access administrator profiles. This screen allows you to search for administrator profiles and create administrator profile reports. The default sort order is by administrator ID.

To display a list of all administrators in the database, click *Search*. To search for specific profiles, select a location from the pull-down menu. The Administrative Profile list displays the profiles that match the search criteria in the specified sort sequence.



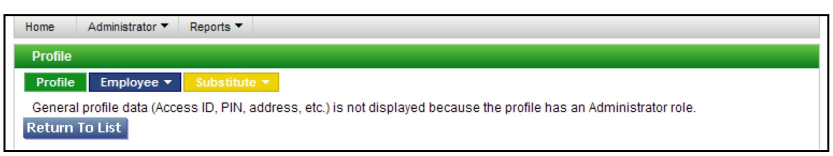
Administrative Profile List

The Administrative Profile list displays profiles that match the search criteria. Clicking on the **ID** link of a profile displays the Modify Profile screen for the administrator. Profile information can be viewed and updated. To delete a profile, click the *Delete* button. For detailed information on modifying profiles, refer to the "*Profile New*" chapter for procedures and field descriptions.

The **Menu Access** option for the administrator can be viewed and modified from the Menu Access screen. The list of authorized locations for the administrator can also be viewed and modified. To add or delete locations and location groups from the profile, click *Modify Locations* on the Location Access screen.

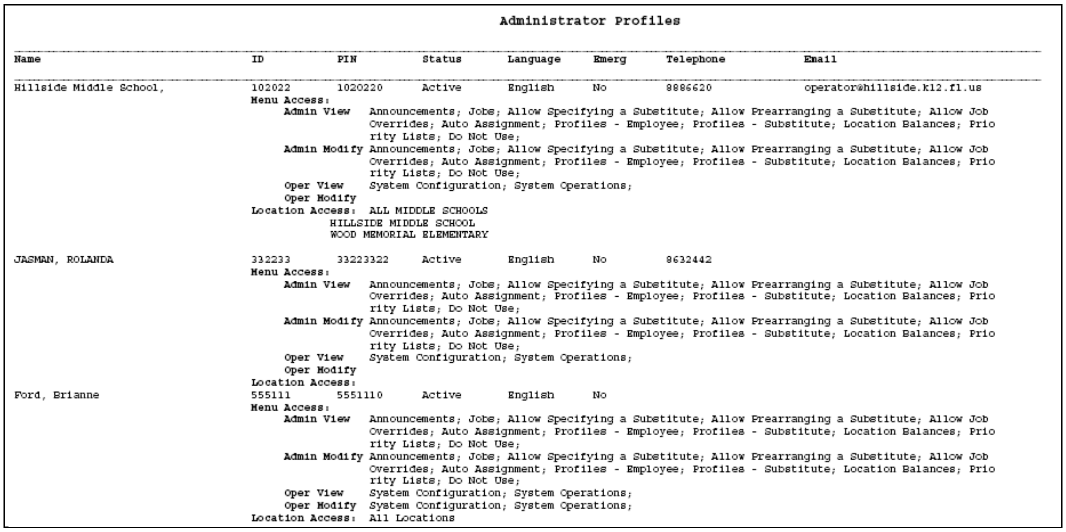
Administrator Access to Administrator Profiles with Multiple Roles

Administrators can access the profiles of other administrators that also have Employee and/or Substitute roles if they have location access to that profile. The system will only display the Employee and/or Substitute portions of the profile to preserve the security of the Administrator role. The other profile options are accessible from the dropdown menus on the profile.



Creating the Administrative Profile report

From the Administrator Inquiry and Reports screen, click *Create Report* to create the Administrative Profile report. The report automatically displays in the Adobe Acrobat Reader. Use the Adobe toolbar to print or save the report. A sample report appears below.

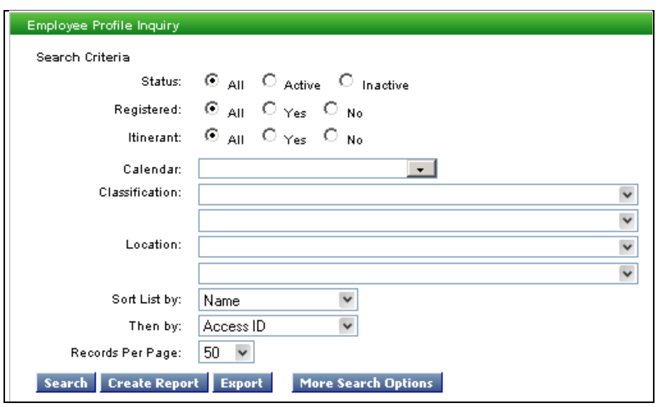


```
                                   Administrator Profiles

Name                          ID        PIN         Status     Language   Emerg    Telephone        Email

Hillside Middle School,       102022    1020220     Active     English    No       8886620          operator@hillside.k12.fl.us
                              Menu Access:
                                  Admin View   Announcements; Jobs; Allow Specifying a Substitute; Allow Prearranging a Substitute; Allow Job
                                               Overrides; Auto Assignment; Profiles - Employee; Profiles - Substitute; Location Balances; Prio
                                               rity Lists; Do Not Use;
                                  Admin Modify Announcements; Jobs; Allow Specifying a Substitute; Allow Prearranging a Substitute; Allow Job
                                               Overrides; Auto Assignment; Profiles - Employee; Profiles - Substitute; Location Balances; Prio
                                               rity Lists; Do Not Use;
                                  Oper View    System Configuration; System Operations;
                                  Oper Modify
                              Location Access: ALL MIDDLE SCHOOLS
                                        HILLSIDE MIDDLE SCHOOL
                                        WOOD MEMORIAL ELEMENTARY

JASMAN, ROLANDA               332233    33223322    Active     English    No       8632442
                              Menu Access:
                                  Admin View   Announcements; Jobs; Allow Specifying a Substitute; Allow Prearranging a Substitute; Allow Job
                                               Overrides; Auto Assignment; Profiles - Employee; Profiles - Substitute; Location Balances; Prio
                                               rity Lists; Do Not Use;
                                  Admin Modify Announcements; Jobs; Allow Specifying a Substitute; Allow Prearranging a Substitute; Allow Job
                                               Overrides; Auto Assignment; Profiles - Employee; Profiles - Substitute; Location Balances; Prio
                                               rity Lists; Do Not Use;
                                  Oper View    System Configuration; System Operations;
                                  Oper Modify
                              Location Access:
Ford, Brianne                 555111    5551110     Active     English    No
                              Menu Access:
                                  Admin View   Announcements; Jobs; Allow Specifying a Substitute; Allow Prearranging a Substitute; Allow Job
                                               Overrides; Auto Assignment; Profiles - Employee; Profiles - Substitute; Location Balances; Prio
                                               rity Lists; Do Not Use;
                                  Admin Modify Announcements; Jobs; Allow Specifying a Substitute; Allow Prearranging a Substitute; Allow Job
                                               Overrides; Auto Assignment; Profiles - Employee; Profiles - Substitute; Location Balances; Prio
                                               rity Lists; Do Not Use;
                                  Oper View    System Configuration; System Operations;
                                  Oper Modify  System Configuration; System Operations;
                              Location Access: All Locations
```

Employee Inquiry and Reports

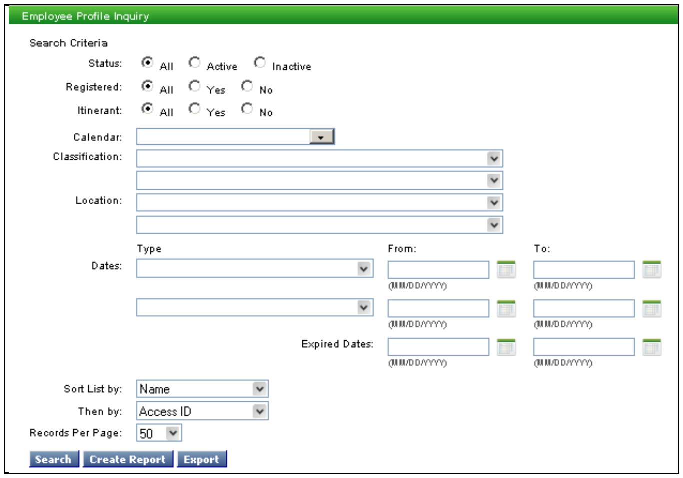
This screen allows you to access information on multiple employees at one time. The reason for this search may be to print a report containing information on multiple employees, to edit several profiles at a time, or to export employee information. All employee reports are created based on the search selection.

You can search using the default search options or enter specific search criteria. Select any combination of search criteria to limit the employee search to employees that match the specified criteria. After entering the search criteria and choosing a sort sequence, click *Search* to display the Employee list.



The Classification and Location searches allow for up to two choices. If *"and"* is selected, both choices must be present in the employee's profile. If *"or"* is selected, either of the two choices must be present in the employee's profile.

To restrict a search to specified date ranges and Date types, click the *More Search Options* button to display additional search criteria.



Multiple date types can be selected. The Date types are selected from the pull-down list. Any Date type that is flagged as "*Used to Expire*" is used in the expired date range search.

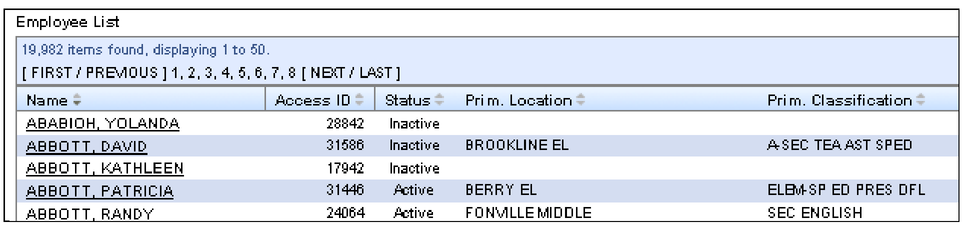
The following section provides a description of each field.

Field	**Description**
Status	Indicate if the search is on all employees, active employees, or inactive employees.
Registered	Select the registration status for the search. The options are: *All* - display all employees whether they have registered with the system to receive a PIN or not. *Yes* - display only employees who have recorded their name by registering with the system. *No* - display only employees who have not yet registered with the system. **Note**: *This feature is useful during implementation of your system to monitor employee registration. Employees cannot report absences until they register.*
Itinerant	Indicate the type of itinerant schedule to be included in the search: The options are: *All* - display all employees who have an itinerant schedule. *Yes* - display only employees who have "*use itinerant schedule*" enabled on their profile. *No* – do not display employees who have itinerant schedules.
Calendar	The pull-down menu displays all calendars that are active in your database. Searching by a calendar displays all employees who have the calendar in their profile.
Classification	The pull-down menu displays classifications or classification groups in alphabetical order. Searching by classification displays all employees with that classification in their profile. Searching by classification group will display all employees who have a classification that belongs to the classification group.
Location	The pull-down menu displays all authorized work locations or location groups. Searching by location displays all employees who have the location in their profile. Searching by location group will display all employees who have a location that belongs to the location group.

Dates From/To	Specify the date range for the employee search. Up to two date ranges can be specified to restrict the search.
Expired From/To	Search results will display only those employees who have expiration dates in their profile that match the specified date range. Any date type that is flagged, as "*Used to Expire*" will be used in the expired date range search.
Type	Select up to two Date types. Authorized dates can include, birth date, hire date, certification date, and other important dates. Any Date type that is flagged as "*Used to Expire*" will be used in the expired date range search.
Sort List By	Select a sort order for the search results.
Then By	Select a secondary sort order to further organize the search results.

Employee List

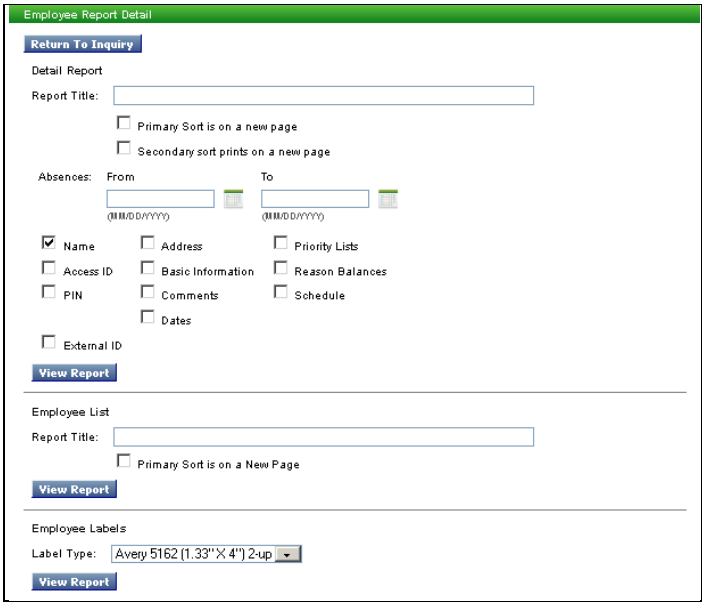
The Employee list displays profiles that matched the search criteria. Profile information can be viewed, updated, and exported. Various employee reports can be created based on the employee list.



Clicking on the **Name** link of a profile displays the Modify Profile screen for the employee. Information on employee profiles can be viewed and modified depending on the administrative setup of the administrator or operator. For detailed information on modifying profiles, refer to the "*Profile New*" chapter for procedures and field descriptions.

Creating Employee Inquiry Reports

To create employee reports, click *Create Report* on the Employee Inquiry and Reports screen after your search has been performed. The Employee Reports screen displays. Select the reporting options for the detail report, employee labels, and employee list report and then click *View Report* to preview the report.



Creating Employee Detail Reports

The Employee Detail report can print for one employee if this option is selected from the employee profile screens, or can print for all employees listed on the Employee list. Report setup options allow you to select the print options for the report and choose the sections from the profile to include on the report. Many customized reports can be created.

The Access ID, External ID, and PIN are visible to administrators only if the district setting *View Employee ID* is enabled on the Parameters – Administrator tab.

The following section provides a description of each field.

Field	**Description**
Report Title	Name that identifies the report. The title will print at the top of each page. The default is blank.
Primary sort is on a new page	Check this box if a new page is required on the primary sort. The primary sort option is the sort sequence in the *Sort List by* field.
Secondary sort prints on a new page	Check this box if a new page is required on the secondary sort. The secondary sort option is the sort sequence in the *Then by* field.
Absences	If searching for absence information, enter the absence date ranges.

After selecting the print options and the detail information you want included on the report, click *View Report* to preview the report. The report is automatically displayed in the Adobe Acrobat reader. Each section selected can display multiple lines of information on the report depending on the volume of data stored in the employee's profile.

Detail Report

Name

Brown, Teacher

Schedule	Loc Order	Class Order	Location Code	Classification Code	Default Times	Start/ End Time	Work Days
	1234	6574	Commack High School 831342345	Calculus 9555-C	No	08:00 AM - 03:00 PM	M T W Th F

Name

DOE, B

Schedule	Loc Order	Class Order	Location Code	Classification Code	Default Times	Start/ End Time	Work Days
	1	1	AREA 52 222	CLASS 2 2	No	08:13 AM - 03:16 PM 00:25 Unpaid	M T W Th F

Name

DOE, C

Schedule	Loc Order	Class Order	Location Code	Classification Code	Default Times	Start/ End Time	Work Days
	1	1	AREA 51 111	CLASS 1 1	Yes	09:00 AM - 04:00 PM 00:25 Unpaid	M T W Th F
	1	2	AREA 51	CLASS 2	No	08:13 AM - 03:16 PM	M T W Th F

Printing Employee Labels

This option allows you to print labels for all employees listed on the employee list.
Labels include name, address, city, state, and zip code if this information is provided on the employee profile.

Three different label types are available:

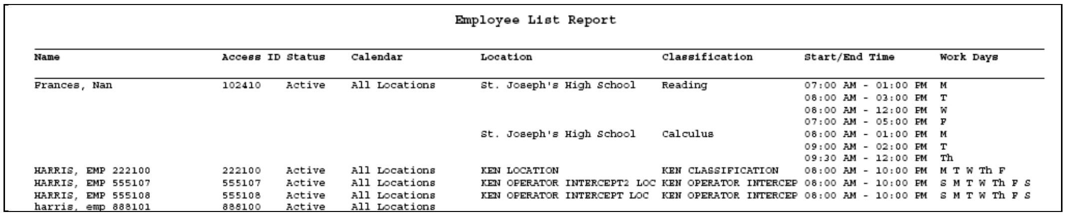
- Avery 5162 (1.33" X 4") 2-up
- Avery 5163 (2" X 4") 2-up
- Avery 5164 (3.33" X 4") 2-up

The labels use a font of Courier 10-point and display the name and address of the employee. Clicking *View Report* starts the Adobe Acrobat reader and provides a preview of the report. The following example shows the layout of the labels. The layout is determined by the type and size of the label selected.

TROY ACHER 7661 ELM ST. ZION, IL 31124	TROY ACHER 7661 ELM ST. ZION, IL 31124
BRENDA LEE CHOW 134 WEST BRANFORD RD. CLEVELAND, OH 49001	JULIE ATWOOD 16 WEST VILLAGE DR. SUITE 440 ADAK, AL 99724

Printing the Employee List

This option allows you to print predetermined information about all employees appearing in the search results. Indicate if a new page is required on the primary sort and then click *View Report* to preview the report. The report automatically displays in the Adobe Acrobat reader. A sample report is provided.



Employee List Report

Name	Access ID	Status	Calendar	Location	Classification	Start/End Time	Work Days
Frances, Nan	102410	Active	All Locations	St. Joseph's High School	Reading	07:00 AM - 01:00 PM	M
						08:00 AM - 03:00 PM	T
						08:00 AM - 12:00 PM	W
						07:00 AM - 05:00 PM	F
				St. Joseph's High School	Calculus	08:00 AM - 01:00 PM	M
						09:00 AM - 02:00 PM	T
						09:30 AM - 12:00 PM	Th
HARRIS, EMP 222100	222100	Active	All Locations	KEN LOCATION	KEN CLASSIFICATION	08:00 AM - 10:00 PM	M T W Th F
HARRIS, EMP 555107	555107	Active	All Locations	KEN OPERATOR INTERCEPT2 LOC	KEN OPERATOR INTERCEP	08:00 AM - 10:00 PM	S M T W Th F S
HARRIS, EMP 555108	555108	Active	All Locations	KEN OPERATOR INTERCEPT LOC	KEN OPERATOR INTERCEP	08:00 AM - 10:00 PM	S M T W Th F S
harris, emp 888101	888100	Active	All Locations				

If the work schedule has multiple classifications, only the primary classification will display.

Exporting Employee Information

The Export feature exports information on all employees listed on the Employee list. Click the *Export* button after the search has been performed. The Employee Export screen is displayed.

Employee data can be exported to a text format for use with other software, or for re-importing the text file back into the system after updating certain fields. Other uses of exported information include:

- Use with mail merge software to produce letters
- Compare data with Human Resources software
- Prepare an annual deletion file of employees that are inactive
- Mass update employees to a new calendar.

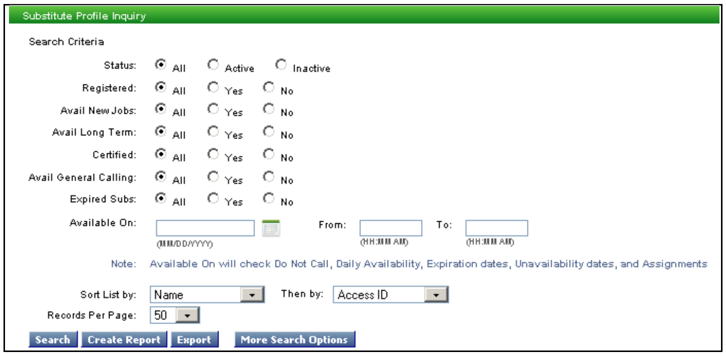
When you click one of the Export buttons, the File Download dialog is displayed. The exported file is automatically created as a text file. Follow screen instructions to download the file.

Substitute Inquiry and Reports

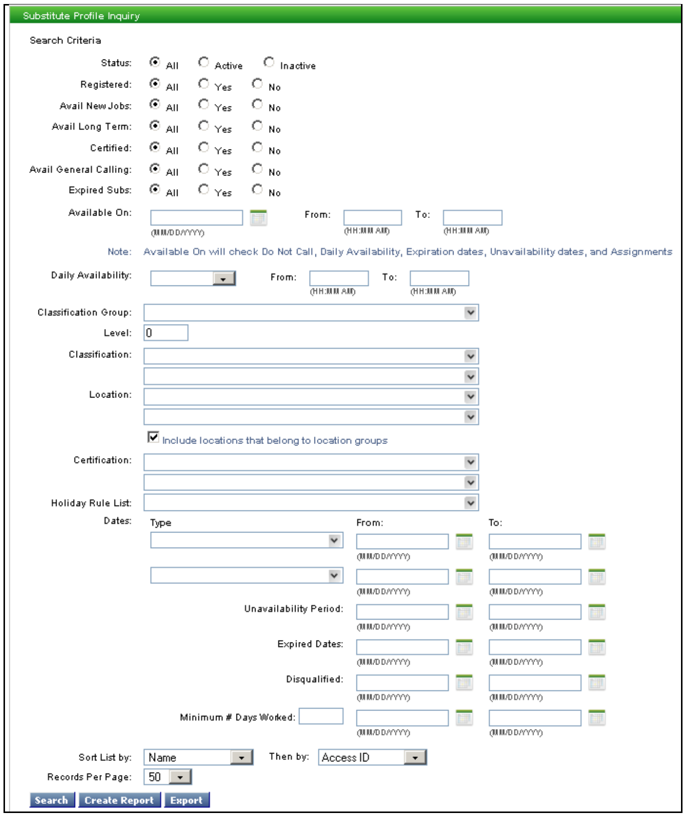
This screen allows you to access information on multiple substitutes at one time. The reason for this search may be to print a report containing information on multiple substitutes, to edit several profiles at a time, or to export substitute information.

All substitute reports are created based on the search selection.

You can perform searches using the default search options or enter specific search criteria. Select any combination of search criteria to limit the substitute search to substitutes that match the specified criteria. After entering the search criteria and choosing a sort sequence, click *Search* to display the Substitute list.



To further restrict the search, click *More Search Options* to display additional search fields.



The Classification, Location, and Certification searches allow for up to two choices. The choices must be present in the substitute's profile. The following section provides a description of each field.

Field	**Description**
Status	Indicate if the search is on all substitutes, active substitutes, or inactive substitutes.
Registered	Select the registration status for the search. The options are: *All* - display all substitutes whether they have registered with the system to receive a PIN or not. *Yes* - display only substitutes who have recorded their name by registering with the system. *No* - display only substitutes who have not yet registered with the system. **Note**: *This feature is useful during implementation of your system at the start of the new school year to monitor substitute registration. Substitutes will not be offered any jobs, will not receive any calls, and cannot be specified or prearranged until they register.*
Avail New Jobs	Select the level of substitute availability for the search. The options are: *All* - select all substitutes whether or not they are eligible for current and future jobs. *Yes* - display only substitutes whose profiles have "*Avail for New Jobs*" selected in their profile. *No* - display only substitutes whose profiles do not have this option checked on their profile.
Avail Long Term	Select the long-term availability status for the search. The options are: *All* - select all substitutes whether or not they are eligible for long-term jobs. *Yes* - display only substitutes whose profiles have "*Available for Long Term"* selected in their profile. *No* - display only substitutes whose profiles do not have this option checked.
Certified	Select the certification status for the search. The options are: *All* - select all substitutes whether or not they are certified. *Yes* - display only substitutes whose profiles have "*Is Certified*" selected in their profile. *No* - display only substitute profiles that do not have this option checked.
Avail General Calling	Select the available for general calling status for the search. The options are: *All* - select all substitutes whether or not they are available for general calling. *Yes* - display only substitutes whose profiles have "*Available for General Calling*" selected in their profile. *No* - display only substitute profiles that do not have this option checked.

Field	Description
Expired Subs	Select the expired subs status for the search. The options are: *All* - select all substitutes with expiration dates in their profile whether those dates are used to expire the substitute or not. *Yes* - display only substitutes that have any Date types flagged as "Used to Expire." (With an expiration date in the past) *No* – display only substitutes that do not have any Date types flagged as "Used to Expire." (With an expiration date in the past)
Available On	If searching for available substitutes for a specific date, enter the desired date and times. When using the *Available On* date and searching for an available substitute, the recommended settings are *Active* for the Status field, *Yes,* for the Registered field and *Yes* for Avail New Jobs field. This ensures that the list will include active and available substitutes. You can further define the available substitutes by specifying more selection criteria, such as location or classifications, by clicking *More Search Options*. An available substitute is typically defined as: ▪ Status = Active ▪ Available for new jobs = Yes ▪ Registered = Yes ▪ Has permanent daily availability for the date and time specified ▪ Does not have a temporary period of unavailability for the date and time specified ▪ Does not have any date flagged as "used to expire" with an expiration date earlier than the date specified ▪ Not currently assigned on the date and time specified ▪ A "Do Not Call" has not been set for the date and time specified.
Daily Availability	Indicate the day and enter the times for availability. When entering a specific daily availability in their profile, typically you are not searching by the "*Available On*" date. Selecting this search does not indicate that the substitute is or is not already working on a specific date or any other criteria that defines them as "Available." Instead, this search is limited to the substitute's availability setup in their profile.
Classification Group	Selecting a classification group searches for substitutes that have any of the classifications in their profile that apply to the classification group. If using the classification group setup, you are not typically selecting any specific classifications.
Level	Indicate the level to be used for this search. Only substitutes that have this level set up on the Classification screen will be displayed.
Classification	Up to two classifications can be entered. The choices must be present in the substitute's profile.
Location	Up to two locations can be entered. The choices must be present in the substitute's profile.

Field	**Description**
Include Locations that belong to Location Groups	Check this box if you are looking for substitutes that have been assigned to specific locations that belong to the location group selected. Do not check this option if you are searching for substitutes that were assigned to a location group only.
Certification	This option uses the Certification setup screen in the substitute profile. Up to two certifications can be entered. The choices must be present in the substitute's profile.
Holiday Rule List	Selecting a holiday rule list searches for substitutes who were included on specific holiday preferred lists. The pull-down menu contains the names of holidays from the "All Locations" calendar that have the *Use Holiday Rule List* flag enabled.
Dates:	
Type	This option uses the Date screen in the substitute profile. Up to two Date types and date ranges can be selected from the pull-down menu.
Unavailability Period	The date range that represents the unavailability period to be used for the search.
Expired Dates	Date types flagged as "*Used to Expire*" are used in the expired date range search. A specific date that is flagged as "*Used to Expire*" can be selected using the Date Types pull-down menu instead of using this search.
Disqualified	Searching with this date range results in displaying all substitutes who were disqualified because they reached a limit for the day as currently set in the system parameters for exceeding the number of hang-ups, declines, and no answers.
Minimum # of Days Worked	Searching with a quantity for the minimum number of days worked within a specific date range results in displaying substitutes who worked the minimum number of days during the date range specified.
Sort List By	Select a sort order for the search results.
Then By	Select a secondary sort order to further organize the search results.

Substitute List

The Substitute list displays profiles that match the search criteria. Profile information can be viewed, updated, and exported. Various substitute reports can be created based on the substitute list.

Substitute List

9,755 items found, displaying 1 to 50.

[FIRST / PREVIOUS] 1, 2, 3, 4, 5, 6, 7, 8 [NEXT / LAST]

Name	Access ID	Call Back #	Status	New Jobs	Is Reg	Is Exp	Is Cert	Last day worked
AAAPERSON, BERNADETTE	32577	4075551234	Active	Yes	No	Yes	Yes	
ABABIOH, YOLANDA	28842	4075551234	Inactive	No	Yes	No	No	
ABBOTT, KATHLEEN	17942	4075551234	Inactive	No	Yes	No	No	
ABBOTT-WOOD, GRACIELA	14815	4075551234	Inactive	No	Yes	No	No	
ABBS, JACQUELINE	15552	4075551234	Inactive	No	Yes	No	No	

Clicking on the **Name** link of a profile displays the Modify Profile screen for the substitute profile. Information on substitute profiles can be viewed and modified depending on the administrative setup of the administrator or operator. For detailed information on modifying profiles, refer to the "*Profile New*" chapter for procedures and field descriptions.

The search results will not display your changes until you run the search again by clicking *Search*. This is because the search results display a copy of the data that exists when the search happens. Changes do not cause this screen to update automatically. The search has to be performed again to go back to the database and view the changes.

Creating Substitute Inquiry Reports

To create substitute reports, click *Create Report* on the Substitute Inquiry and Reports screen after your search has been performed. The Substitute Detail Reports screen displays. Select the options for the Detail report, Substitute list, Substitute labels and the Statistics report and then click *View Report* to preview the report.

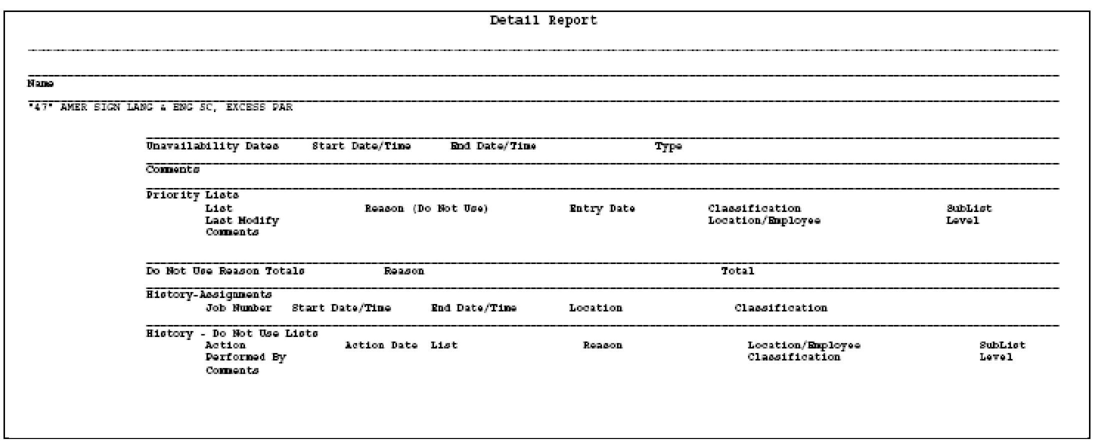
Creating Substitute Detail Reports

The Substitute Detail report can print for one substitute if this option is selected from the substitute profile screen, or can print for all substitutes listed on the Substitute list. Report setup options let you select the print options, choose the profile information to include on the report, and choose the setting for history information. Many customized reports can be created.

The following section provides a description of each field.

Field	**Description**
Report Title	Name that identifies the report. The title will print at the top of each page.
Each Substitute is on a New Page	Check this box if a new page is required for each substitute. Depending on the information required, there can be multiple pages printed for each substitute.
Profile	Check the box(s) next to the profile information required for the report.
History	Enter a date range if history information is required. Select the start and end dates of the period in order to display any or all of the following field options: ▪ *Phone & Web Job Actions* - the total number of calls and Web statistics made from and to the system during the period ▪ *Phone and Web Statistics* - the total number of calls and Web statistics ▪ *Cancellation Calls to Substitute* - calls made to the substitute as notification that a job was cancelled ▪ *Daily Availability Changes* - the days/times of the week the substitute will work ▪ *Do Not Call Settings* - all changes made to temporary and permanent “Do Not Call” settings ▪ *Unavailable Date Changes* - all changes to unavailability dates. ▪ *Assignments – all jobs that the substitute has worked or will work.* ▪ *Do Not Use Lists – all Do Not Use Lists that the substitute is assigned to*

After selecting the print options and the detail information you want included on the report, click *View Report* to preview the report. The report is automatically displayed in the Adobe Acrobat reader. Each section selected can display multiple lines of information on the report depending on the volume of data stored in the substitute's profile. A sample report is provided.



Detail Report

Name

"47" AMER SIGN LANG & ENG SC, EXCESS PAR

Unavailability Dates   Start Date/Time   End Date/Time   Type

Comments

Priority Lists
List   Reason (Do Not Use)   Entry Date   Classification   SubList
Last Modify   Location/Employee   Level
Comments

Do Not Use Reason Totals   Reason   Total

History-Assignments
Job Number   Start Date/Time   End Date/Time   Location   Classification

History - Do Not Use Lists
Action   Action Date   List   Reason   Location/Employee   SubList
Performed By   Classification   Level
Comments

Printing the Substitute List

This option allows you to print daily availability and unavailability dates for all substitutes listed on the substitute list. Check the box(s) to indicate the required information and then click *View Report* to preview the report. The report automatically displays in the Adobe Acrobat reader. A sample report is provided below.

Substitute List Report

Name					Status	New Jobs?	Is Reg?	Is Exp?	Is Cert?	Last day worked	Order
ABBOTT, ANNA					Active	Yes	Yes	No	Yes	2005/10/11	10
	Daily Availability	**Day of Week**	**From**	**To**							
		Monday	07:59 AM	05:00 PM							
		Tuesday	07:59 AM	05:00 PM							
		Wednesday	07:59 AM	05:00 PM							
		Thursday	07:59 AM	05:00 PM							
		Friday	07:59 AM	05:00 PM							
ABBOTT, MICHAEL					Active	Yes	Yes	No	Yes	2003/10/23	148
	Daily Availability	**Day of Week**	**From**	**To**							
		Monday	06:00 PM	11:59 PM							
		Monday	All Day								
		Monday	05:00 AM	07:00 AM							
		Tuesday	All Day								
ACHER, TROY					Inactive	Yes	Yes	Yes	No		70
	Daily Availability	**Day of Week**	**From**	**To**							
AHMED, OMAR					Active	Yes	Yes	Yes	Yes	2005/10/17	124
	Daily Availability	**Day of Week**	**From**	**To**							
		Monday	07:59 AM	05:00 PM							
		Tuesday	07:59 AM	05:00 PM							
		Thursday	07:59 AM	05:00 PM							
		Friday	07:59 AM	05:00 PM							

Printing Substitute Labels

This option allows you to print labels for all substitutes listed on the Substitute list. Labels include name, address, city, state, and zip code if this information is provided on the substitute profile.

Three different label types are available:

- Avery 5162 (1.33" X 4") 2-up
- Avery 5163 (2" X 4") 2-up
- Avery 5164 (3.33" X 4") 2-up

Clicking *View Report* starts the Adobe Acrobat reader and provides a preview the report. The following example shows the layout of the report. The layout is determined by the type and size of the label selected.

WAYNE ALCOTT
9980 COUNTY RD. 152

JASPAR, TX 45912

ANNA ABBOTT
744 WILKENSON

SAN DIEGO, CA 98024

ALISTER BARNETT
3813 EASON MEADOWS

GARLAND, 75043-204

ROBERT J. ALLISON
2023 STEMMONS FRWY.

ARLINGTON, TX 43564

Printing Substitute Statistics

Statistics are printed for all substitutes listed on the Substitute Inquiry list. A date range must be entered for the statistics. Clicking *View Report* starts the Adobe Acrobat reader and provides a preview of the report. The following example shows the layout of the report.

Substitute Statistics Report(06/01/2010-06/02/2010)

Sub Name	Assgnmt Calls	Accpt	Decl	Hngup	Ans Mach	Busy	No Ans	No Rngbk	Oper Intcpt	Web Accpt	Web Decl	Admin Assgnd	Pre-arrngd	Auto Assgnd	Cncl By Sub	Cncl Other	Last Called	Last Worked
AAAPERSON, BERNADETTE	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ABARION, YOLANDA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ABBOTT, KATHLEEN	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ABBOTT-WOOD, GRACIELA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ABBS, JACQUELINE	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ABERCROMBIE, ASHLEY	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ABERNATHIE, MARIE	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ABERNATHY, BRANDY	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ABLES, MELINDA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ABOUMERHI, DALE	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ABRAM, KRISTEN	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ABRAMSON, ANNIE	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		10/19/2009
ABREGO, DEBRA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ABREGO, MARY	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ACEVEDO, CLAIRE	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
ACEVEDO, SYLVIA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		

The following table provides a description of each field.

Field	Description
Assignment Calls	Number of times the system attempted to call the substitute to offer an available assignment.
Accpt	Number of times the substitute accepted Assignment Calls.
Decl	Number of times the substitute declined Assignment Calls.
Hngup	Number of times during Assignment Calls where an answer occurred, a substitute logged into the system, but then disconnected without an accept or decline action.
Ans Mach	Only applicable if the system parameter is on to “Assign Jobs to Answering Machine.” The number of times a message was left of an assignment on an answering machine during Assignment Calls.
Busy	Number of times the system detected a busy line signal for Assignment Calls.
No Ans	Number of times that an Assignment Call was made, but no connection was established; or a connection was established but a PIN was never entered. This includes pickups by an answering machine and fax machine.

Field	Description
No Ringbk	Number of times the system attempted to make an Assignment, heard dial tone, dialed the number, but never heard ringing that the call connected.
Oper Intcpt	Number of times the system attempted to make an Assignment Call, heard dial tone, dialed the call and got a message from phone carrier that call could not be completed.
Web Accpt	Number of assignments the substitute reviewed via the Web and selected to Accept.
Web Decl	Number of assignments the substitute reviewed via the Web and selected to Decline (they may review more assignments; this count is for the assignments they actually took the action to Decline).
Admin Assgnd	Number of assignments for the Substitute that were assigned by an Administrator.
Pre Arrgnd	Number of assignments for the Substitute that were assigned as a pre-arrangement.
Auto Assgnd	Number of assignments for the Substitute that were assigned via the Auto Assignment step/rule.
Cncl by Sub	Number of assignments the Substitute had, but cancelled.
Cncl Other	Number of assignments the Substitute had, but was cancelled either by the job being cancelled or an Administrator cancelled their assignment.
Last Called	Date/time the system last called the substitute.
Last Worked	Date/time the substitute last worked an assignment.

Exporting Substitute Information

The Export feature exports information on all substitutes listed on the Substitute list. Click the *Export* button after the search has been performed. The Substitute Export screen is displayed.

Substitute data can be exported to a text format for use with other software, or for re-importing the text file back into the system after updating certain fields. Other uses of exported information include using it with mail merge software to produce letters, data comparisons with Human Resources software; preparing an annual deletion file of substitutes that are inactive or expired, or performing mass updates on substitute information.

Note: *Not all substitute information can be exported. There is not an export for the locations, classifications, and priority lists on a substitute's profile.*

When you click one of the Export buttons, the File Download dialog is displayed. The exported file is automatically created as a text file. Follow screen instructions to download the file.

Profile New

Overview

A single profile can be set up with any or all of these roles: administrator, employee, and substitute. It is recommended that a profile be created for every person that will access the system. The system activity log will record the ID and name of the profile that makes changes in the system.

Profiles with employee or substitute access can call the system to register and enter their PIN number as long as the profile indicates that they are active.

Setting up Administrator Profiles

Note: *Although information on setting up administrator profiles is included in this chapter, only system operators have access to administrator profile setup and maintenance.*

Administrators are configured for specific access to menus for employees, substitute, and job information. Administrative profiles are allowed to access multiple locations or location groups. Operators are typically set up with access to all locations and system menus, while a site-based administrator (principal, secretary, or other designated person at a location) is typically set up with access to their location only.

It is possible to set up a profile with administrator access that only will be shared at a location. The access ID and PIN would be an assigned number and the last name would be the location name. If is preferable that each person at the site be set up with the appropriate access level.

An administrator where “Is Active” is not checked cannot gain access to the system.

Setting up Employee Profiles

Employees are the only users who can be absent. Employees call the system to register. During registration, they will voice their name and enter a PIN number. An employee where “Is Active” is not checked cannot gain access to the system.

A profile can be created for an employee that represents a position (instead of a person), or as a substitute that is on a long-term assignment and can be absent. Substitutes that are on a long-term assignment would have the same location and classification as the employee who is absent. It may be helpful to place a code such as, “LTS” or “*” in the name of the profile to make long-term substitutes distinguishable from other employees.

Setting up Phantom Employees

You may use phantom employees to represent special circumstances that require a substitute, but an employee is not absent. Phantom employees allow you to enter an absence that does not have an absentee. You may use employees with an access ID and PIN generated by the operator to represent these special circumstances. You can enter as many phantom employees as you desire. The best way to address this situation is to use the vacancy option. However, vacancies may not address all needs such as:

- Assigning a name and budget code to the special circumstances that can occur on a regular basis
- Dividing an absence into separate reasons while keeping (for payroll purposes) that absence as one single absence for the employee.

Concurrent absences that have overlapping dates and times may not be reported for phantom. You must have a different phantom employee for each absence that you need on a given day or for a given period. The process of adding a phantom employee is the same as the process of adding a regular employee, except that you must decide on the location, classification, and an artificial ID for each phantom before entering the information for that position.

If you are not using the vacancy option, when a location needs a substitute for one of these positions, the location's administrator accesses the system and reports an absence for the appropriate position. SmartFind*Express* then follows its normal procedures for locating a qualified, available substitute.

Setting up Substitutes

Substitutes are the only users who can be assigned to jobs. A job assigned to a substitute is called an assignment. A substitute where “Is Active” is not checked cannot gain access to the system.

Setting up Phantom Substitutes

A profile can be created for a substitute that represents special situations (instead of a person). You must decide on an artificial ID before entering the information for that position. The “Name” field should reflect the special circumstances so that information is visible on job reports. Normally, substitutes cannot be assigned to concurrent jobs or to jobs that overlap. By checking the box “Allow overlapping assignments” on the Optional Information tab, the entry of multiple concurrent jobs filled by one substitute is allowed. Typically, these substitutes are prearranged to the job and should never be called by the IVR. Some examples for using this feature are:

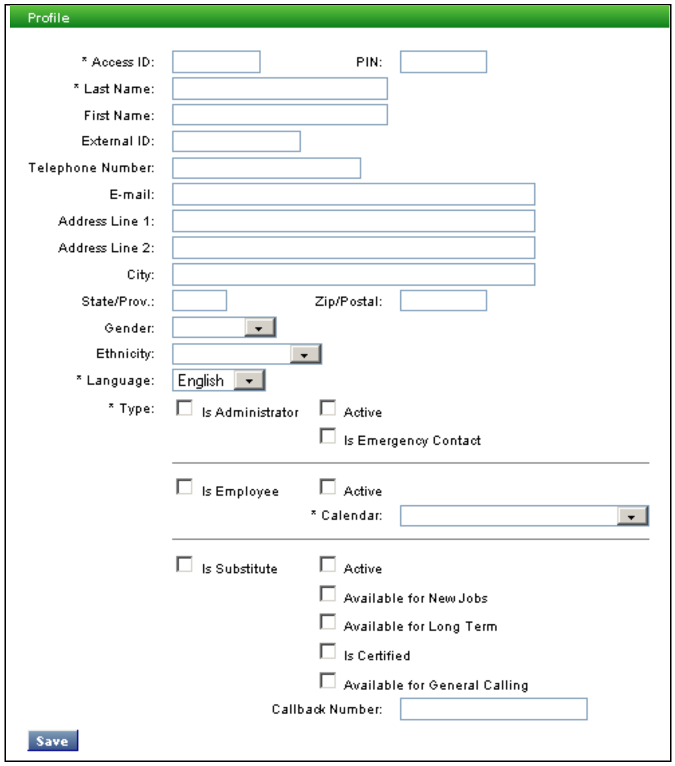
- The class combined with another. If one substitute covers three classrooms at once by combining them into one large study hall, thereby filling three employee’s absences, the substitute would be assigned to one employee’s absence in the system. The remaining absences would be assigned to phantom substitutes because the absences must be recorded and they did require a substitute.

- A roving substitute was needed.

- The job was filled using in-house personnel.

Completing the New Profile Form

To add a new profile, click *Profile New* to display the New Profile screen. Enter the requested information and then click *Save*. When you click *Save*, additional tabs will display based on the type of profile you are adding. Information on these screens must be completed for the new profile.



Note: *The Web User ID and Web Password fields will only display if the district is configured to use these fields for SmartFindExpress web login.*

Field Name	Description
Access ID	Unique number up to nine digits in length that identifies the profile. Only numbers can be entered. All profile types access the system using this ID. Common ID's are social security number (SSN or SIN), payroll identifier, or 7-digit telephone number. This access ID is optionally displayed to administrators if the parameter "View Employee ID" or "View Substitute ID" is enabled on the Parameters – Administrator tab. **Note**: *Access IDs cannot have leading zeros.* When using the telephone, administrators will need to know the access ID of employees in order to enter an absence on their behalf. Administrators and employees that are allowed to specify substitutes will also need to know the access ID of substitutes. If using an artificial ID, it is recommended that the ID begin with "8." The "8" is suggested because in the United States, social security numbers are not distributed beginning with that digit.
Last Name	Last name should be the name of profile. The name can also be the location's name if multiple administrators are sharing the ID.
First Name	Enter the first name of the profile.
Web User ID	Unique User ID used for Web login (*if the district is configured to use Web User ID for Web login).*
Web Password	Unique password used for Web login (*if the district is configured to use Web User ID for Web login*).
External ID	Unique identifier for the employee up to 16 alpha/numeric characters in length. This is a secondary identifier for the employee and can be used for data integration. Commonly, the social security number or payroll identifier of the employee is entered as the External ID. This identifier is optionally displayed to administrators. **Note**: *External IDs can have leading zeros.*
PIN	PIN is a numeric value that does not have to unique in the system. The PIN (Personal Identification Number) is entered upon registration or modified on the telephone by the substitute, employee, or administrator. The PIN can optionally be assigned/reassigned when creating or updating the profile. The minimum number of digits that must be entered for a valid PIN is set up on the Parameters – Configuration tab. This number should be high enough to maintain adequate security. **Note**: *PINS can have leading zeros.*

Field Name	Description
Telephone Number	The telephone field for employee and substitute access is not used by the system for calling, and is captured for data collection purposes only. Telephone numbers display exactly as they are entered as no special formatting is added to the number entered. Valid characters include ( ) - , * # and spaces. The telephone field for administrator access is used by the system for calling if the “Is emergency contact” field is enabled. Otherwise, this field is recorded for data collection purposes only. The telephone number must be entered exactly as it is to be dialed, including an area code and “1” for long distance numbers if needed.
Email	The email address on a profile is used by the system to send automatic emails (job assignments, assignment cancellations, job reminders) if the district is using the Email feature.
Address Line 1	There are two lines available for entering street information. Entering an address into the profile allows you to print address labels.
Address Line 2	There are two lines available for entering street information. Entering an address into the profile allows you to print address labels.
City	The city where the profile is located.
State/Prov	Enter as a two-letter abbreviation.
Zip/Postal	The zip or postal code should be entered exactly as it will be printed.
Gender	This field is recorded for data collection purposes only.
Ethnicity	This field is recorded for data collection purposes only.
Language	The default language to be used for this profile.

Field Name	Description
Type: Select all the types that apply to this profile:	
Is Administrator	Check the *Type* box to enable administrator access. Check the *Active* box for this administrator to have access to the system. Check, the *Is Emergency Contact* box if this administrator is to be called by the system for an emergency. Typically, one or more system operators have the emergency contact option enabled. If checked, a telephone number must be entered. There are two conditions for which SmartFind*Express* will call an emergency contact: ▪ If a power failure has caused the system to run off battery backup and detects there a low battery condition, the system will call this person prior to shutting down the system. Calls are made to all personnel with the emergency call option checked until one is reached. The person enters a PIN to hear the message that the system is shutting down. If personnel are not reached within the required time, the system proceeds with the shutdown as necessary. ▪ For districts that have multiple call processors and when one call processor stops working, another call processor will detect the problem and call the emergency contact telephone number. System configurations with a single call processor or server will not use this feature because when that call processor is not working, no other call processor is available to place the notification call.
Is Employee	Check the *Type* box to enable employee access. Check the *Active* box for this employee to have access to the system. Check the *Calendar* box to indicate that a calendar of holidays and no substitute required (NSR) days is followed by the employee. Calendars are setup by system operators for all the types of employees that have different workdays. The pull-down list displays all of the available calendars including the "All Locations" calendar. The calendar prevents absences from being reported on holidays. **Note**: *The Administrator must have the Profiles – Employee Modify permission ON/checked for their own profile to have the ability to set Employee settings on a profile.*

Field Name	Description
Is Substitute	Check the *Type* box to enable substitute access. Check the *Active* box for this substitute to have access to the system. Check the *Available for New Jobs* box if this substitute will be able to accept assignments, search for assignments, be specified for assignments, or be assigned by administrative personnel. If the field is not checked, the substitute is considered inactive, but is still able to access the system. Check the *Available for Long Term* box. This field is recorded for data collection purposes only. It does not restrict a substitute from being offered jobs considered long term. Operators and administrators are able to search for substitutes using this field, and are searching for a substitute to fill a long-term assignment. Check the *Is Certified* box. This field is recorded for data collection purposes only. It does not restrict a substitute from being offered jobs. When searching by name for a substitute, this field will display. Check, the *Available for General Calling* box if the substitute can be called from the General list when the calling system reaches that step during callout. The General list calls substitutes who will work at the location, but may not have the classification of the assignment in their profile. If you are leveling substitutes from their classification, then they should also be leveled on the General list. The *level* is entered on the Optional Information screen. *Callback Number*: Enter the telephone number that the system will use when contacting the substitute. Telephone numbers display exactly as they are entered as special formatting is added to the number entered. Valid characters include ( ) - , * # and spaces. If it is a long distance number, the “1” and the area code, if required, must appear in this field to correctly call the substitute from the location of the system. Substitutes confirm this number during the registration process. They can change this number at any time after obtaining a PIN. This process ensures that the system always has the most accurate telephone number to dial when calling the substitute. **Note**: *The Administrator must have the Profiles – Substitute Modify permission ON/checked for their own profile to have the ability to set Employee settings on a profile.*

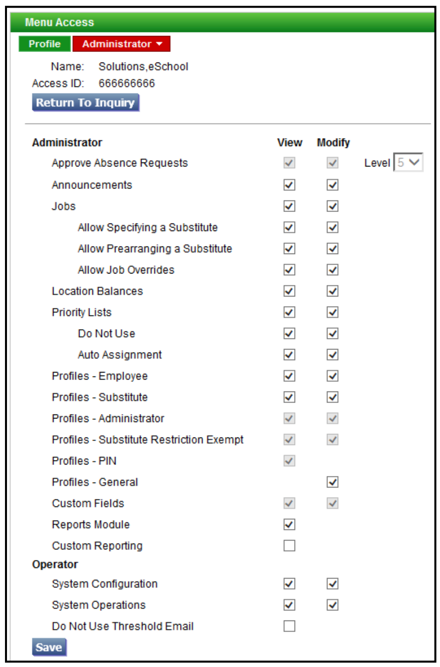
When you click *Save* on the Profile New screen, additional tabs display for the administrator, employee, and/or substitute. Enter the requested information on these tabs to complete the profiles.

Completing the Administrator Profile

The Administrator profile includes the Menu Access and Location Access links. System operators are typically set up with view and modify rights to all menu items and location access to all locations.

Menu Access

This tab lists the functions available to administrators and operators. Click the boxes under *View* and *Modify* to enable the functions for this administrator profile. Administrative profiles that have view access rights only will not have access to any buttons or links that would add, modify, or delete information. Click *Save* to add these administrative functions to the profile.



Setting	Description
Absence Approval Requests	Indicates if the administrator can view or view/modify absence approval requests submitted in the system. The Modify permission enables an approval level to be assigned to the administrator. The approval level specifies the level of the absence approval request that the administrator can approve, deny, or modify in the system.
Announcements	Controls access to Announcements. If access is not enabled, the Announcement menu item will not be visible.
Jobs	Controls access to job information. If access is not enabled, the Job menu items will not be visible. If “View” is enabled, Daily Job Counts and Job Inquiry/Reports are the menu choices. If “Modify” is enabled, Create an Absence, Create a Vacancy, Daily Job Counts, and Job Inquiry/Reports are the menu choices.
Allow Specifying a Substitute	Indicates if the administrator can specify a substitute. This is applicable only when modify Jobs is enabled.
Allow Prearranging a Substitute	Indicates if this administrator can prearrange a substitute. This is applicable only when modify Jobs is enabled.
Allow Job Overrides	Indicates if the administrator can perform job overrides. Overrides allow the administrator to override system restrictions/limitations in order to create a job, as required.
Location Balances	Controls access to location balances. If access is not enabled, the location balance menu item will not be visible.
Priority Lists	Controls access to priority lists. If access is not enabled, the priority list menu item will not be visible.
Do Not Use	If priority lists is “Modify,” and this field is checked, personnel can view or modify Do Not Use Lists within the priority lists. Administrators that are required to document why a substitute should not be used at their location, would not allow site administrators to update their Do Not Use list.
Auto Assignment	If priority lists is “Modify,” and this field is checked, personnel can view or modify Auto Assignment lists within the priority lists. Operators that are required to control the auto assignment of substitutes would not allow site administrators to update their Auto Assignment list.
Profiles - Employee	Controls access to the Employee profiles on the Profile New and Profile Inquiry/Reports menu items. If access to both profile items is not enabled, these tabs will not be visible.
Profiles - Substitute	Controls access to the Substitute profiles on the Profile New and Profile Inquiry/Reports menu items. If access to both profile items is not enabled, these tabs will not be visible.

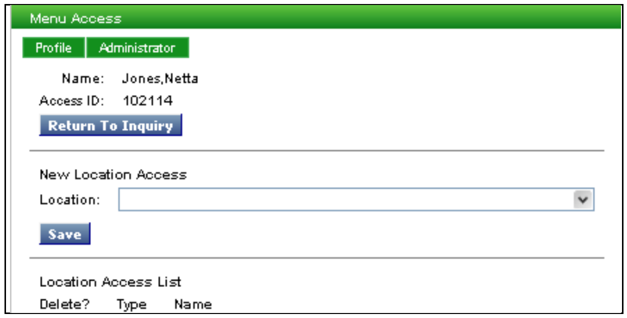
Setting	Description
Profiles – Substitute Restriction Exempt	Indicates if the administrator can view/modify the 'Exempt from hours restriction' fields on the Substitute Optional Information page. If "View" is enabled, the Exempt from hours restriction' fields will display on the Substitute, Optional Information page, but cannot be modified. If "View/Modify" is enabled, the exemption fields can be modified to enable the administrator to fill jobs with substitutes that will exceed the work hour restrictions.
Profiles – Employee and Substitute PINs	When this option is enabled, employee and substitute passwords will display on exports and reports.
Profiles -PIN	Administrators can view other location Administrator profiles if View/Modify for the Profiles – Administrator option is enabled. This profile level access takes precedence over the View Employee ID and View Substitute ID parameters on the Parameters: Administrator page.
Profiles -General	Controls the "modify" capability for the Profile tab on all profile types. The Profile tab is the first tab on a profile and includes name, address, etc., as well as on/off settings to set a profile as an Administrator, Employee, or Substitute profile. The default value for this permission is enabled and allows the Delete and Save buttons on the General Profile page of any profile type to display. When this permission is disabled, no modifications will be allowed to the General profile tab. The Return to List button will display if the profile was found by a search. **Note**: *To modify the on/off settings to set a profile as an Employee, or Substitute, the user must have Modify permission for Employee or Substitute profiles (see above).*
Custom Fields	Controls the display of custom fields on the Profile record. If View and Modify are unchecked, the Profile record will not contain a custom fields section. If "View" is enabled, a "custom fields" section displays on the Profile page. If "Modify" is enabled, the parameters for a custom field can be modified by the administrator.
Reports Module	When this option is enabled, the Administrator menu bar will contain a Reports feature.
Custom Reporting	When this option is enabled, the Reports menu will contain a Custom Reports option.
Operator:	
System Configuration	Allows access to all menu items found on the System Configuration menu. **Note**: *If View or Modify is checked, the profile is considered an Operator.*
System Operations	Allows access to all menu items found on the System Operations menu. **Note**: *If View or Modify is checked, the profile is considered an Operator.*
Do Not Use Threshold Email	When this option is enabled, the Operator will receive an email when a substitute reaches the configured threshold for a Do Not Use reason. An email address must be populated in the Operator profile. This field is disabled by default and will appear

	grayed out. To enable this option, at least one View or Modify checkbox must be selected for System Configuration or System Operations.

Location Access

Administrator access is restricted to specified locations and location groups. Administrators may view or modify jobs, employees, and substitutes only for the locations indicated on the profile. The location access screen displays all the locations and location groups in their profile. Locations can be added or deleted from the administrative profile.

The ID and Name appear in the first section of this screen. The list of locations already assigned to the profile is listed on the location pull-down menu sorted by location groups first and then by name.

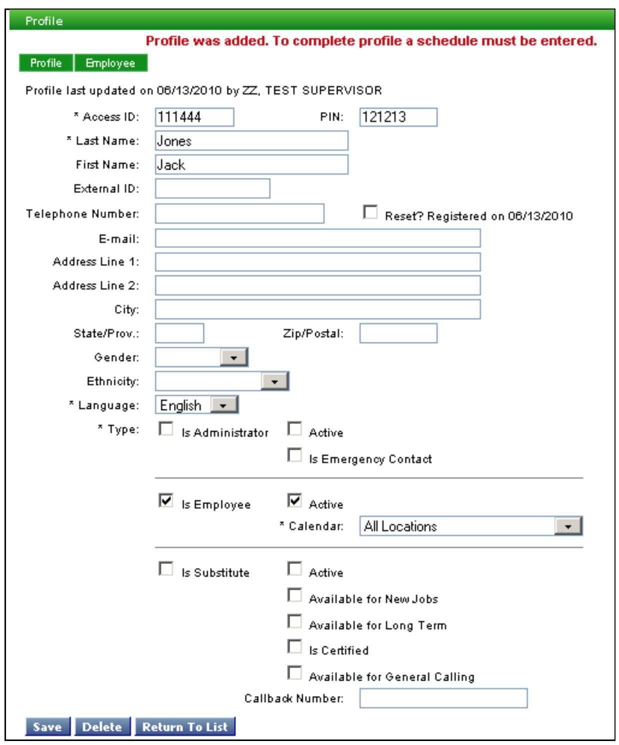


To add a location(s) to the list, select either a location group or a location from the pull-down list. Click *Save*. The administrative profile list will redisplay.

To delete locations from the list, check the delete checkbox next to the location or location group you wish to delete and then click *Delete*. The location is removed from the Location Access list. The administrative profile list will redisplay.

Completing the Employee Profile

Once you complete the primary information on the Profile screen and click *Save*, the Profile screen is redisplayed with an Employee tab. The features available from the Employee tab allow you to enter the additional information required to complete the employee profile.

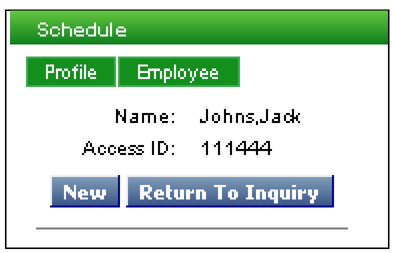


The following features are available from the Employee tab:

- **Schedule** – information on the employee's work schedule, locations, classifications, and rank locations and classifications. The lowest ranking location and classification is considered their "Primary" for reporting purposes.
- **Absences** – information about absences for the employee using various search options.
- **Calendar** –absence information in calendar format and the ability to access job information for a calendar day.
- **Dates** – date information on an employee, such as birth date and hire date.
- **Optional Info** – additional information specific to this employee, such as itinerant schedule information, budget code information, or special comments on the employee.
- **Priority Lists** – information on the list of substitutes to be called first when an absence is reported for the employee.
- **Reason Balances** – setup and maintenance of employee reason balances
- **Report Detail** – profile and job information can be selected to print on the report.

Schedule

Administrators can access, create, modify and delete schedules.



The Schedule page collects information on the locations the employee will work, the classifications the employee is authorized to work and the work days and times. Employees can have unlimited numbers of work schedules.

Multiple employee schedules can be created for the same location/classification combination and schedules can consist of overlapping days and times. Each schedule created, however, **must** have a unique location/classification order.

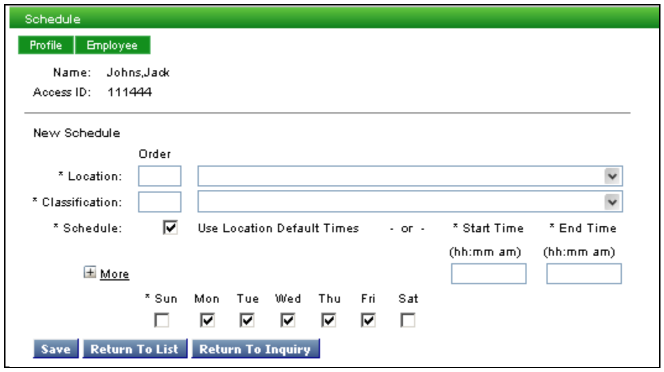
Various kinds of schedules can be created, such as:

- Schedules can be created with different times for different days at the same location.
- A schedule can consist of different classifications for the same location
- A schedule can contain multiple entries for the same location/classification combination
- A location can have many classifications in the same work schedule.

When employees report an absence, they must select a work schedule if they have multiple work schedules for the same day. Employees must report an absence for each work schedule. Different substitutes will be found for each absence.

Adding Schedules

Click New to create a new schedule. The New Schedule page displays.

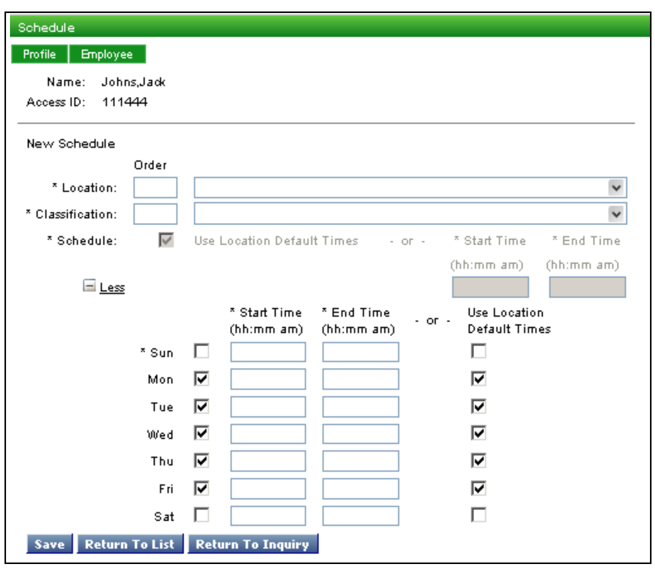


To create a schedule, select the location and classification from the drop-down menus, assign an order number for the location and classification and complete the schedule information. A location's default times can be used for the schedule or a different start and end time can be entered for the schedule.

Setting up Flexible Schedules

NOTE: *If an employee has multiple schedules for the same classification they may not be able to create an absence on the* ***telephone*** *for every one of the schedule entries for that classification. They will be able to create the absence on the Web.*

When a work schedule requires different times on different days of the week, click the *More* link, located above the days of the week checkboxes, to enter work day and start/end time information. The New Schedule page is redisplayed with day and time fields for the work week. The fields are populated with current schedule information. A work schedule can have days that use the location's default time and days with a different start and end time.



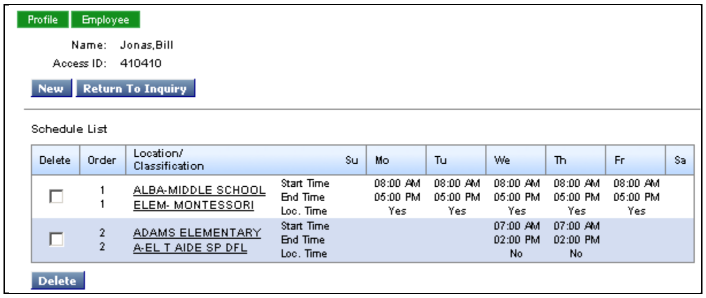
For each of the work days in the schedule, enter the desired changes to work day and times. Click Save to save the work schedule. The new schedule displays on the Schedule List.

To exit the form without saving scheduling information, click the *Less* link. The default Schedule page is displayed with the Schedule fields enabled.

Field Name	**Description**
Order	Enter a numeric value to indicate the order for the selected location and classification. The lowest ordered location is considered the primary location of the employee for reporting purposes.
Location	Select a location from the pull-down menu. Unlimited locations can be entered on an employee's profile.
Classification	Select a classification from the pull-down menu. The classification indicates the job(s) performed by the employee. An employee can perform multiple jobs at the same location. A different work scheduled is not required for each classification. Each classification is given an *order*. The lowest order on the primary location is considered the primary classification for reporting. When employees report an absence, they select the location and can select any classification that is at that location.
Schedule	Click the *Use Location Default Times* checkbox to have this schedule use the selected location's work times. If the work times change for that location, all employees (with this box checked) will use the new times. If *Use Location Default Times* is not enabled for the schedule, enter a start and end time for the schedule and select the workdays by clicking the appropriate day of the week checkbox. Any changes to the schedule times must be performed through a modify action. *More/Less links* For schedules with different times for different work days, select the *More* link to display the additional fields for entering different schedule times. Each work day in the schedule can have a different start/end time or can use the location's default times. Click the *Less* link to redisplay the default schedule page without saving any scheduling information.

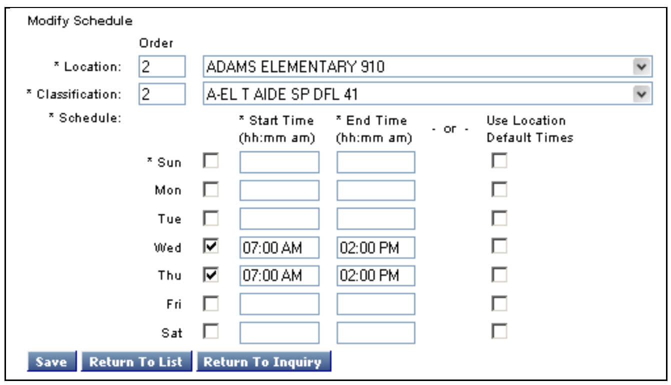
Schedule List

The Schedule List displays all of the employee's work schedules. All start and end times are displayed for each of the work days. If a location's time is being used for the schedule, a "Yes" or "No" value is indicated below the start/end time information. Schedules can be modified or deleted from the Schedule List.



Modifying Schedules

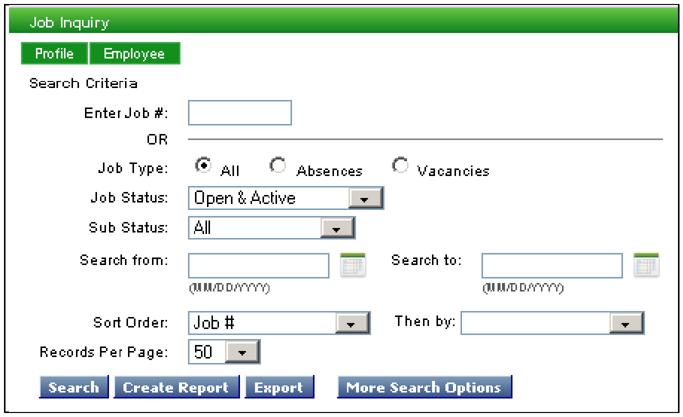
To modify a work schedule, click on the Location/Classification link for the work schedule on the Schedule List. The Modify Schedule page is displayed.



Make any changes to the schedule times/days and then click Save. The updated schedule is displayed on the Schedule List.

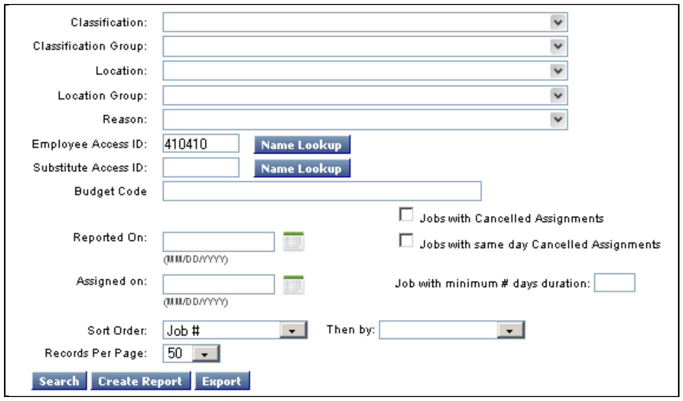
Absences

The Absences tab allows you to view information about absences for the employee. You can enter the job number or enter any combination of the search criteria. The *More Search Options* button displays additional search fields that can be used to narrow the search. Searches can be specified for a location, classification, location group, classification group, substitute, budget code, or reason. The Location drop-down menus will display all authorized locations and location groups. Similarly, the Classification drop-down menus will display all defined classifications and classification groups. You can create a report based on the search results, and export job information. Exported information can be used in other databases or applications.



Field Name	**Description**
Enter Job#	The number assigned to the job when the job was created.
Job Type	Click in the appropriate box to indicate if you are searching on all jobs, absences, or vacancies.
Job Status	Select a job status to search on from the pull-down menu. The job status indicates the current condition of that job. Status conditions include: All, Open & Active, Open, Active, Finished and Verified, Finished, Verified and Cancelled. • Open jobs are for today, but not yet ended, or for days in the future and a substitute has not yet been assigned • Active jobs are for today, but not yet ended, or for days in the future and a substitute is assigned • Finished jobs have completed • Verified jobs have completed and are marked as verified • Cancelled jobs are only jobs that have been cancelled.
Sub Status	Select a sub status to search on from the pull-down menu. Jobs can have various subsidiary statuses, but have been categorized into the following three categories: All, No Sub Required, Filled and Not Filled.
Search From	Select a "search from/search to" date range to search for jobs that started on a particular date, ended on a particular date, or occurred within the date range.
Sort Order/Then By	Select the sort order from the pull-down menu. To further define your sort, select a secondary sort order from the *Then by* pull-down menu. Sort options on both menus are Budget Code, Classification Name, Employee Name, End Date, Job #, Location Name, Reason Name, Start Date, Job Status, Job Sub-Status, and Substitute name.

To perform a more specific search, click *More Search Options. The* following screen displays.

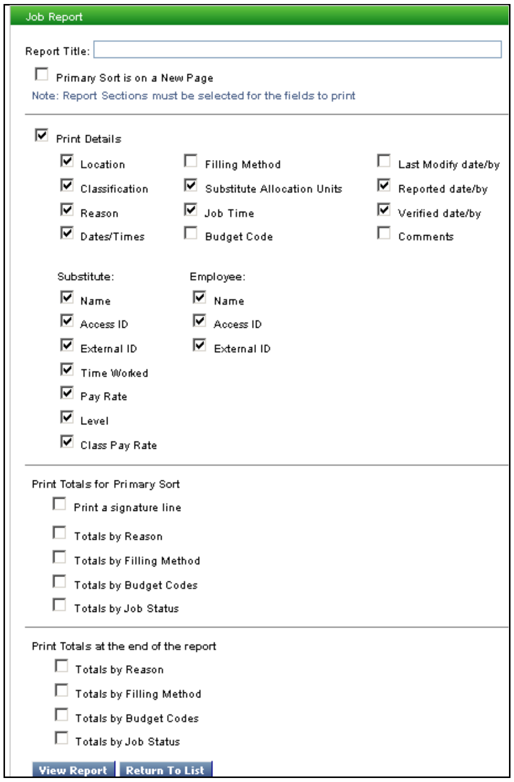


Field Name	**Description**
Classification Group	Select a classification group from the drop-down menu or leave this field blank. If you select a classification group, only jobs with that classification group will appear in the search results.
Classification	Select a classification from the drop-down menu or leave this field blank. If you select a classification, only jobs with that classification will appear in the search results.
Location Group	Select a location group from the drop-down menu or leave this field blank. If you select a location group, only jobs for that location group will appear in the search results.
Location	Select a location from the drop-down menu or leave this field blank. If you select a location, only jobs for that location will appear in the search results.
Reason	Select a reason from the drop-down menu or leave this field blank. If you select a reason, only jobs with that absence/vacancy reason will appear in the search results.
Employee Access ID	To search for jobs assigned to a specific employee only, enter the employee's access ID number. If unknown, click Name Lookup to search for the employee by name.
Substitute Access ID	To search for jobs assigned to a specific substitute only, enter the substitute's access ID number. If unknown, click Name Lookup to search for the substitute by name.
Budget Code	Enter the budget code assigned to the job. The budget code can be from the employee profile, a default location budget code, or a budget code entered with a reason when the job was created.
Reported On	Searching with this date field results in displaying jobs that were reported on the date indicated.

Field Name	Description
Assigned On	Searching with this date field results in displaying jobs that were assigned to the substitute on the date indicated.
Jobs with Cancelled Assignments	Check this box to search for jobs that contain cancelled assignments.
Jobs with Same Day Cancelled Assignments	Check this box to search for jobs that contain same day cancelled assignments.
Job with Minimum # Days Duration	To search for jobs that are a minimum number of days in length, enter that number in this field.
Sort Order	Select the sort order from the pull-down menu.
Then By	Select a secondary sort order to further organize the search results.

Creating the Job Report

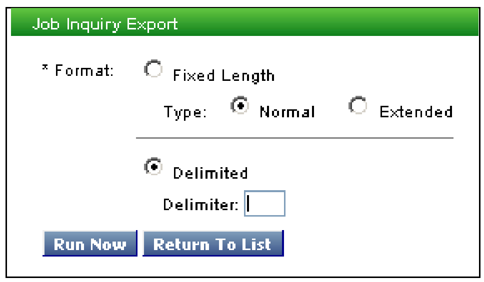
Click *Create Report* to print the details from the job search. The Job Report screen is displayed. Select the detail and summary information for the job report and then click *View Report* to preview the report.



Field Name	**Description**
Report Title	Enter a title to identify the report.
Print Details	Click the appropriate box(s) to select the job detail, substitute, and employee information to include in the job report.
Print Totals for Primary Sort	Check the appropriate boxes to indicate if a signature line should be printed and to select the summaries to be included in the report.
Print Totals at the End of the Report	Check the appropriate box to indicate the totals to include at the end of the report.

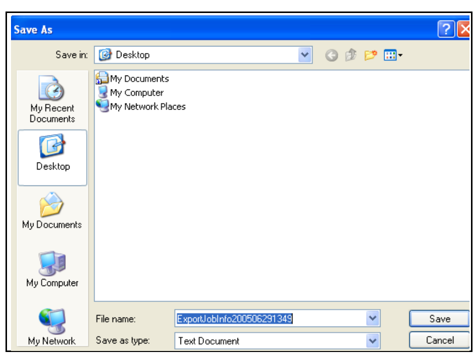
Exporting Job Information

Use this feature on the Job Inquiry screen to export information on all jobs in the search results. Exported information can be used in other databases or applications. After performing your search to select the job information you want, click *Export*. The File Download dialog is displayed.

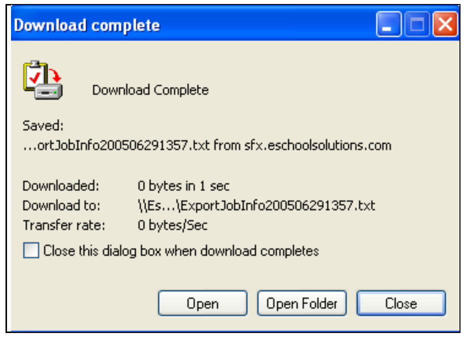


The exported file is automatically created as a text file. The text file can be imported or opened using a variety of database applications.

If you click *Open* on the File Download page, the exported file opens in the Notepad editor. If you click *Save*, the Save As dialog displays.

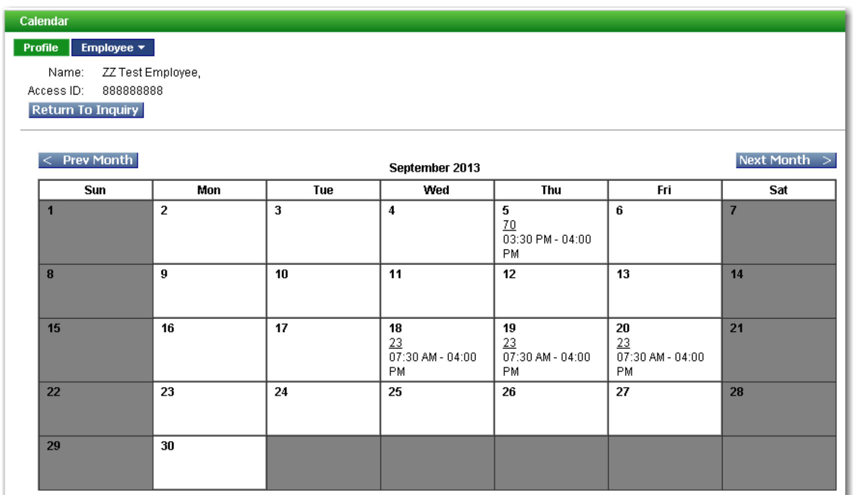


Select the location where you want to save the file and enter a name for the exported file. Click *Save* to start the export process or click *Cancel* to return to the Job Inquiry screen without exporting the job data. When the export is complete, the following screen displays.



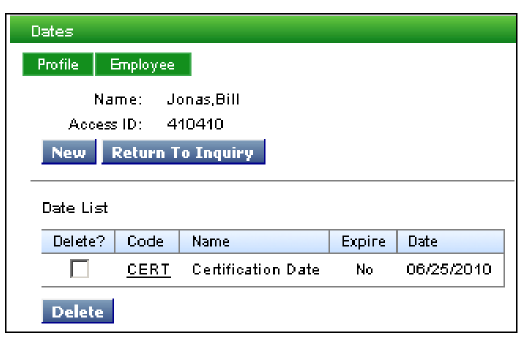
Calendar

Absence information for an employee can be viewed in calendar format. The calendar starts with the current month with buttons to access the next and previous month's data. Non-workdays for the employee (including holidays and "No Substitute Required" days) are shaded in gray. The start and end times for jobs are displayed. Clicking the **job number** link under the calendar day displays job detail information. The Job Inquiry screen is displayed.



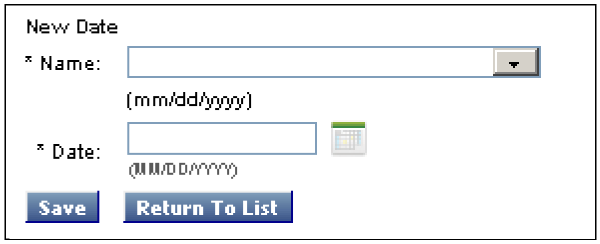
Dates

The Dates screen stores dates such as the employee's birth date, hire date, certification date, and other important dates. You can display, add, modify, and delete dates.



Adding Dates

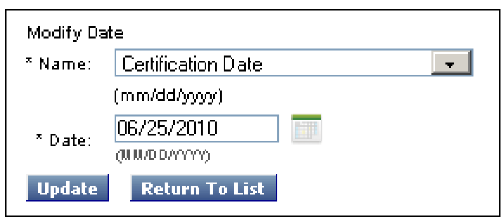
Click *New* to display the New Date screen. Enter the required information and click *Save* to add the date to the profile.



Field Name	Description
Name	The pull-down menu lists the authorized dates.
Date	Enter a date by typing the date in the correct format or by pressing the date icon and selecting a date from the calendar.

Modifying/Deleting Dates

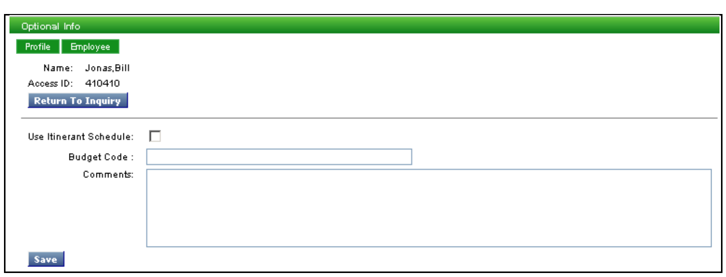
From the Date list, click the **Code** link for the date you want to modify. The Modify Date screen is displayed. Update the appropriate fields and click *Save*.



To *Delete* a Date, click the checkbox next to the Date(s) you want to remove from the list and then click *Delete*.

Optional Information

This screen allows you to supply additional information on an employee. After entering the information, click *Save*.

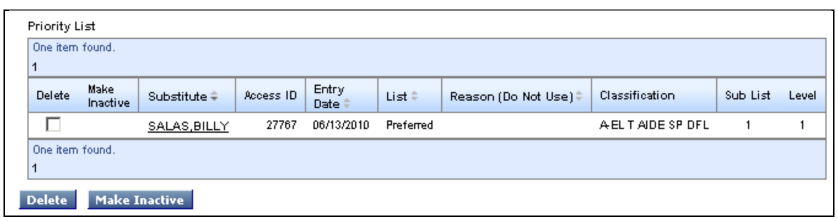


Field Name	**Description**
Use Itinerant Schedule	Itinerant teachers travel to multiple locations. Checking this box allows the employee to select any location and classification when reporting an absence. If this is not checked, the locations and classifications available when creating an absence are restricted to those found on their schedule. Itinerant teachers must have a primary location and classification in their profile for reporting purposes and to obtain their work schedule.
Budget Code	If an employee's absence is billed to a particular account, enter that budget code or account number in this field. It will automatically be inserted into each absence for the employee unless the reason for the absence requires manual entry of a budget code. The budget code on the employee profile overrides any default budget code that has been defined. The budget code field is validated for the length of the field. Changes to this field only affect absences created after the changes are saved. Existing jobs are not automatically updated.
Comments	Use this field to record information for which there is not a designated field, for example, complaints, commendations, special considerations, reason, and date of an administrative action, etc. Employees cannot view the comments unless printed by the operator in a report. A person that is registered as an employee and as a substitute does not share the same comments section on the employee profile and the substitute profile.

Priority Lists

The Priority Lists screen allows you to assign substitutes to various lists so that they are called first when an absence is reported for the employee. A substitute can also be added to an employee's priority list via the substitute's profile or the Priority Lists feature. Because employees cannot maintain priority lists, administrators and operators must maintain these lists. You can display, add, modify and delete employee priority lists and change the status of Active Do Not Use lists to Inactive Do Not Use.

Entries on the Priority List will always display the substitute's access ID for Operators. For administrators, the View Substitute ID parameter in Parameters – Administrator, Browser Access, must be enabled for the substitute's access ID to display in the results list.


Priority List

One item found.
1

Delete	Make Inactive	Substitute	Access ID	Entry Date	List	Reason (Do Not Use)	Classification	Sub List	Level
☐		SALAS,BILLY	27767	06/13/2010	Preferred		A-EL T AIDE SP DFL	1	1

One item found.
1

Delete Make Inactive

Make Inactive

The "Make Inactive" feature enables administrators to change any Active Do Not Use entries to Inactive by checking the box next to the item. Active Do Not Use entries can be modified to Inactive Do Not Use; however, Inactive Do Not Use entries cannot be modified to Active Do Not Use. Inactive/Active Do Not Use entries can be deleted.

A substitute's Do Not Use reason count is determined by the total of Active plus Inactive Do Not Use entries per Reason. Deleted Do Not Use entries, active or inactive are not considered in this count.

Entry Date

The date shown in this field is the date the entry was added to the priority list. For priority list entries in the system prior to Release 1.5, the last modify date for the entry is displayed in this field.

Reason (Do Not Use)

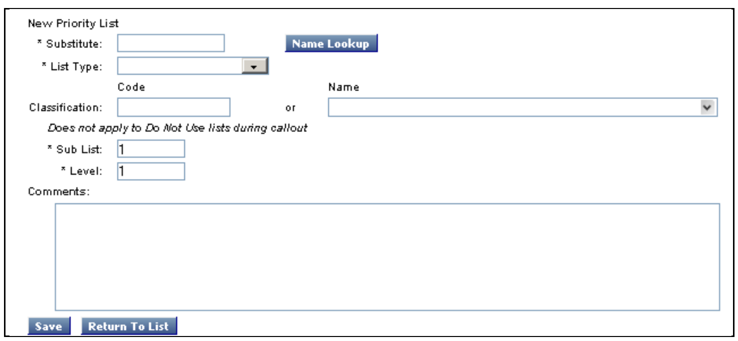
If a record does not have a reason populated, no reason will display in the Reason (Do Not Use) column for that record. The field will be blank.

Delete

To delete a Priority List, click the box next to the list you want to delete on the Priority List screen and click *Delete*.

Adding Priority Lists

Click *New* to display the New Priority List screen. Complete the settings, and click *Save* to add the substitute to the priority list.

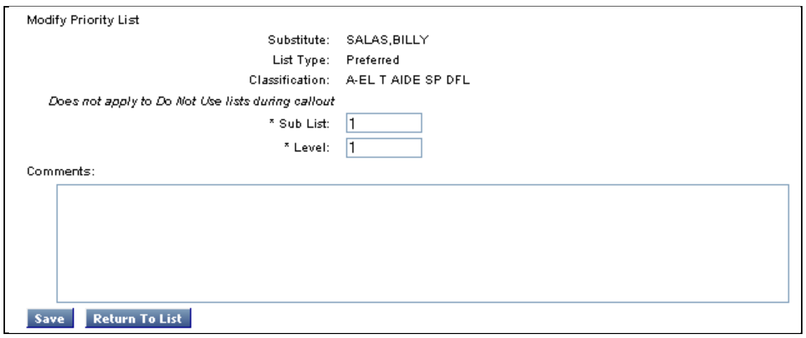


Field Name	Description
Substitute	Enter the substitute ID or press *Name Lookup* (if visible) to search for the substitute by name.
List Type	Select a priority list from the pull-down menu. Lists do not require the selection of a classification. If no selection is entered, this substitute will work for the employees even if the employee has multiple classifications. The Active Do Not Use, Inactive Do Not Use and Automatic Assignment lists are offered to administrators based on their administrative profile setup.
Reason	The Reason dropdown only displays when the list types of Active Do Not Use or Inactive Do Not Use are selected. The screen re-displays with the Reason drop-down field for selecting a reason.
Classification Code or Name	The classification code can be entered, if known, instead of selecting a classification from the pull-down list. The Classification pull-down contains the classifications found in the employee's profile.
Sub List	A numeric value that indicates the order in which substitutes will be called. The substitute with the lowest number is called first for an assignment.

Level	A numeric value that indicates the order substitutes will be called within a sublist. The substitute with the lowest number is called first for an assignment. Level is typically used to indicate seniority. For example, an 8-digit seniority date can be entered for the level, such as 20040101.
Comments	Optional informational can be added on priority lists. This field is alphanumeric and up to 256 characters.

Modifying Priority Lists

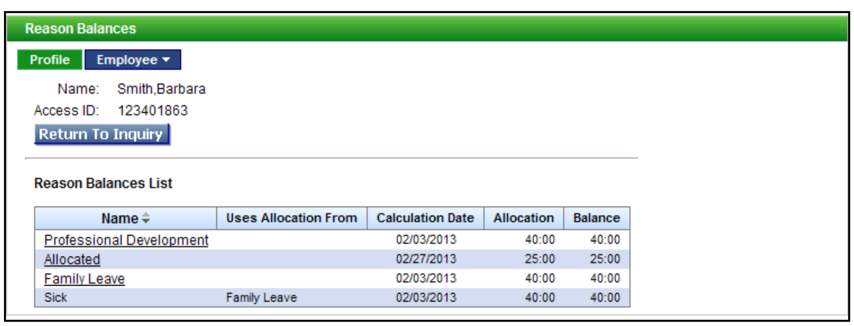
Click on the Substitute link of the priority list to display the Substitute Priority List Modify screen. Update the appropriate fields, and click *Save*.



Reason Balances

This feature allows you to view and modify reason balances for an individual employee. The Reason Balances List provides the following reason balance information:

- Reason name
- The 'Uses Allocation From' reason name, if the reason counts towards another reason's balance
- Calculation date of the reason
- Time allocated to the employee for the reason usage
- Remaining balance for the reason



If a reason's remaining balance is zero and the reason is configured to restrict absences when the balance is zero, the employee will not be able to create an absence using this reason. Reasons for absences and limitations on the use of a reason can be tracked.

When a job is cancelled, the employee's reason balance is updated. The time previously deducted for the cancelled job is added back to the employee's reason balance.

All reasons that are set up to use reason balances are displayed on the Reason Balances List. Reasons are defined by selecting the Reasons menu item and then the *Absence/Vacancy Reasons* option.

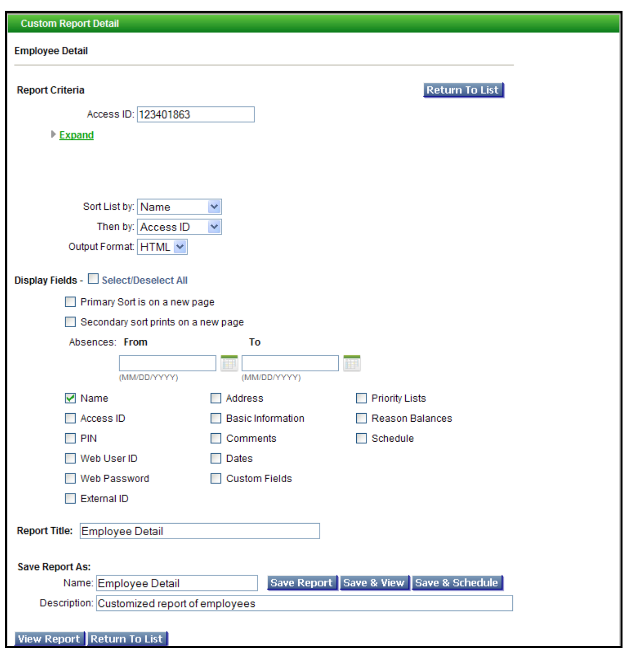
Modifying Reason Balances

To modify the calculation date and/or the time allocated to the reason, click on the reason name. The Modify Reason Balances screen is displayed. Update the desired fields and click *Save*.

Field Name	**Description**
Calculation Date	Date the employee's absence records are used to calculate the remaining time.
Allocation	The hours/minutes allotted to an employee. This number replaces the previous value for the number of hours/minutes that are allocated to the employee for that reason.

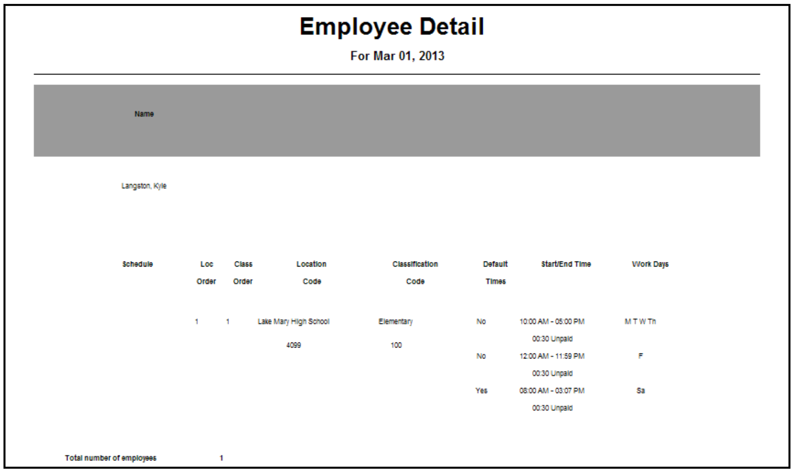
Report Detail

The Report Detail screen allows you to enter a date range for the absence information and select the data to include in the report.



NOTE: *The Web User ID and Web Password fields will only display if the district is configured to use these fields for SmartFindExpress web login.*

The report automatically displays in the Adobe Acrobat reader.



Employee Detail

For Mar 01, 2013

Name

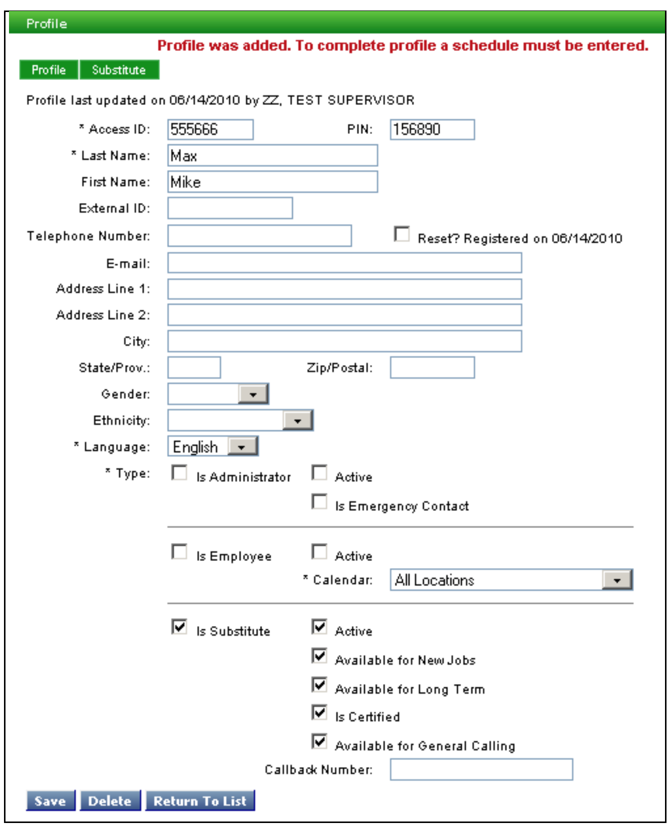
Langston, Kyle

Schedule	Loc Order	Class Order	Location Code	Classification Code	Default Times	Start/End Time	Work Days
	1	1	Lake Mary High School 4099	Elementary 100	No	10:00 AM - 05:00 PM 00:30 Unpaid	M T W Th
					No	12:00 AM - 11:59 PM 00:30 Unpaid	F
					Yes	08:00 AM - 03:07 PM 00:30 Unpaid	Sa

Total number of employees 1

Completing the Substitute Profile

Once you complete the primary information on the Profile screen and click *Save*, the Profile screen is redisplayed with a Substitute tab. The features available from the Substitute tab allow you to enter the additional information required to complete the substitute profile.

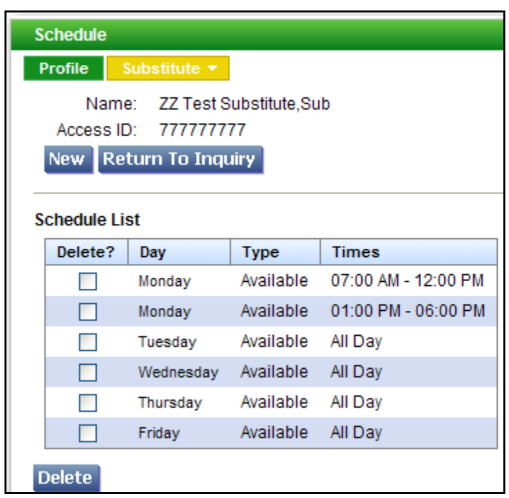


The following features are available from the Substitute tab:

- **Schedule** – records the substitute's daily availability for assignments and calling times.
- **Classifications** – sets up the classifications that the substitute is qualified or willing to teach.
- **Locations** – records the locations where the substitute will work.
- **Assignments –** displays information on the assignments the substitute has worked or will work.
- **Calendar –** provides the assignment information in calendar format.
- **Statistics –** displays statistical information about calls made to the substitute.
- **Certifications –** stores certification information about a substitute.
- **Dates** – stores date information on the substitute, such as birth date and hire date.
- **Optional Information –** stores optional information on a substitute, such as level and pay rate.
- **Priority Lists –** maintains information on the priority lists to which the substitute is assigned.
- **Unavail Dates –** records the periods where the substitute is not available for work.
- **Rpt. Detail –** provides a detail report on the substitute based on the categories selected.

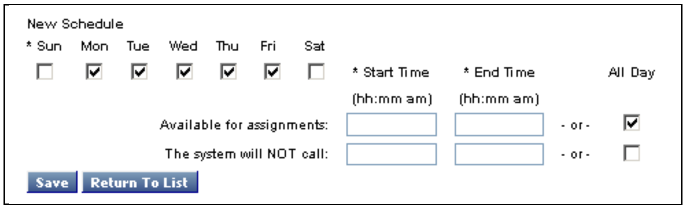
Schedule

The Schedule tab records the substitute's daily availability. This tab allows you to add, modify, or delete daily availability information.



Adding/Deleting a Schedule

Click *New* to display the New Schedule screen. Enter the days and times the substitute is available for work and click *Save* to add this schedule to the substitute's profile.



Field Name	Description
Day Start Time/End Time	Indicate the substitute's daily availability by checking the appropriate box(s). After selecting the days, either *All Day* or a time range must be present. Each day of the week can have a different availability and have multiple availabilities.
Available for assignments	Enter the times of the day that the substitute is available to work. Each day can have multiple times. You can indicate *All Day* instead of entering a time. Entering *All Day* will allow the substitute to be offered or assigned to any job for that day.
The system will NOT call	If "*Allow calling times to be modified,*" is enabled on the Parameters – Substitute tab, calling times for substitutes can be modified. Calling times are modified when the substitute does not want to be called during regular calling hours for every day of the week. To set a time for a substitute, enter a start and end time. Checking *All Day* will ensure that the substitute will never be called during the days specified.

To delete a schedule from the Schedule list, click the box next to the schedule you want to delete and click *Delete*.

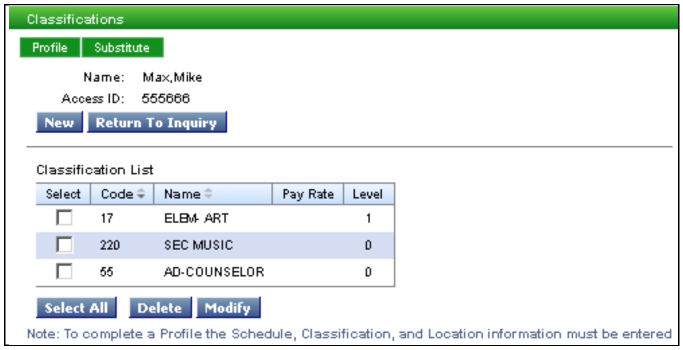
Classifications

Classifications are entered on the profile to indicate which classifications the substitute is qualified or willing to work. A substitute that does not have any classification codes selected on their profile will not receive any job offers unless:

- The system is calling from the general list, the search rule setting "*General List calls Substitutes having at least 1 classification with this search rule"* is not checked and the profile indicates that they want to be called from the general list
- The substitute is on a priority list, or is specified for the job.

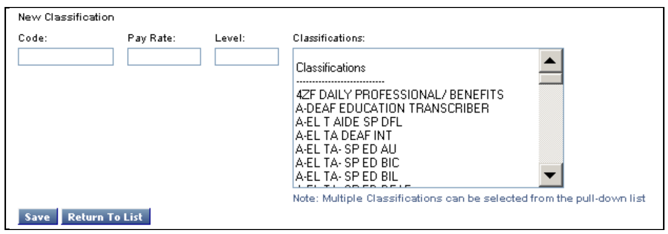
Unique situations may require the absence of classifications on a profile. For example, a retired teacher that only wants to substitute in a particular area and does not want to receive a lot of telephone calls. If no classifications are entered on the profile, this substitute will only be called if requested. Also, this substitute should not be on a priority list, or indicate that they can be called from the general list.

The Classifications tab allows you to add, modify, and delete classifications. The classifications appear on both the classification pull-down list and on the list of classifications in the substitute's profile in the sort order specified.



Adding/Deleting Classifications

Click *New* to display the New Classification screen. Enter the classification settings and click *Save* to add the classification(s) to the substitute profile.



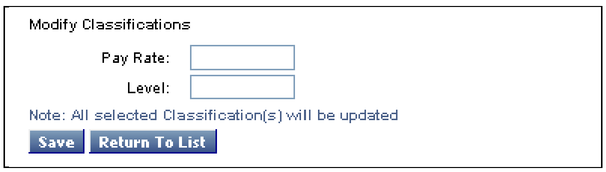
Field Name	Description
Code	The classification/classification group code can be entered if known. Otherwise, select the classification(s) from the pull-down list. Either a code or a classification/classification group name must be selected in order to add a classification.
Pay Rate	The rate of pay that the substitute will receive to teach the classification. If the substitute always has the same rate of pay regardless of the classification being taught, then enter the pay rate on the profile, and do no enter a pay rate in this field. Entering a value here will override the substitute's pay rate. The pay rate is automatically inserted in a job record when the job is assigned or re-assigned to a substitute during job creation, job modification, substitute call-out or substitute call-in. Pay rate can be updated from the Job Details screen, once there is an assigned substitute in the job regardless of the job status. Pay rate is a 10-digit alphanumeric field and is shown on the job report and export formats.

Field Name	Description
Level	If *Use Level to determine calling order* is enabled on the Parameters - General tab, the substitute has to be assigned a level. When the system calls out from the classification lists, this level is used to determine the order in which substitutes are called. Substitutes can be on an equal level. If the substitute always has the same level regardless of the classification being taught, then enter the level on the Optional Information tab and do no enter a level in this field. Entering a value here will override the level found on the Optional Information tab. If the calling order is by seniority order, then the level could indicate a seniority level, such as their seniority date. The level can also represent a number that identifies certified personnel that would be called before non-certified personnel.
Classification	This pull-down list contains all of the classifications and classification groups that are not already found in the substitute's profile. Multiple classification/classification groups can be selected.

To delete a classification from the Classification list, click the box next to the classification you want to delete and click *Delete*. Clicking *Select All* and then *Delete* on the Classifications screen will remove all classifications from the list.

Modifying Classifications

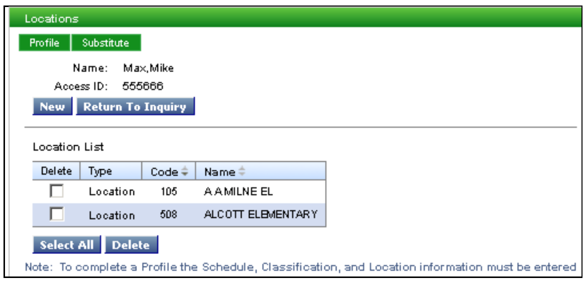
To modify a classification, select the classification and then click Modify. Clicking *Select All* and then *Modify* on the Classifications screen will update all the classifications in the list.



Locations

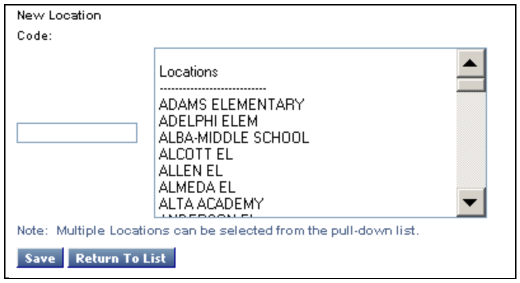
The Location tab records the locations for which the substitute will work. A substitute that does not have any locations will not receive any job offers unless the substitute is on a priority list, or is specified for the job. A substitute can be assigned to location groups as well as to individual locations. When calling from the general location list, only substitutes that have the location of the job in their profile are called.

The Locations tab allows you to add, modify, and delete locations. The locations appear on both the location pull-down list and on the list of locations in the substitute's profile.



Adding/Deleting Locations

Click *New* to display the New Location screen. Enter the location information and click *Save* to add the location(s) to the substitute profile.

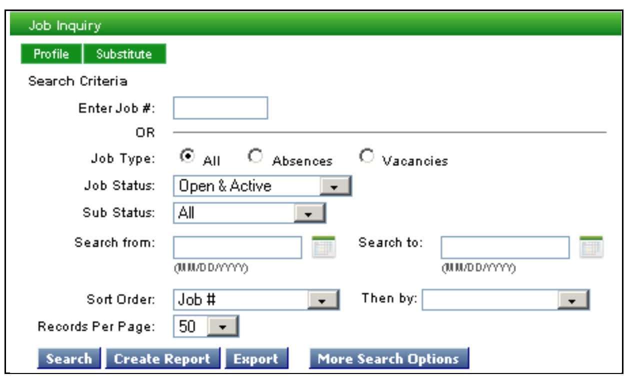


Field Name	Description
Code	Enter the location code, if known, for the location.
Name	Select a location from the pull-down list. Multiple locations can be selected.

To delete a location from the Location list, click the box next to the location you want to delete and click *Delete*. Clicking *Select All* and then *Delete* will remove all the locations from the list.

Assignments

The Job Inquiry screen is used to view information on the jobs that the substitute has worked or will work. You can enter a specific job number or use any combination of the search fields to search for job information.

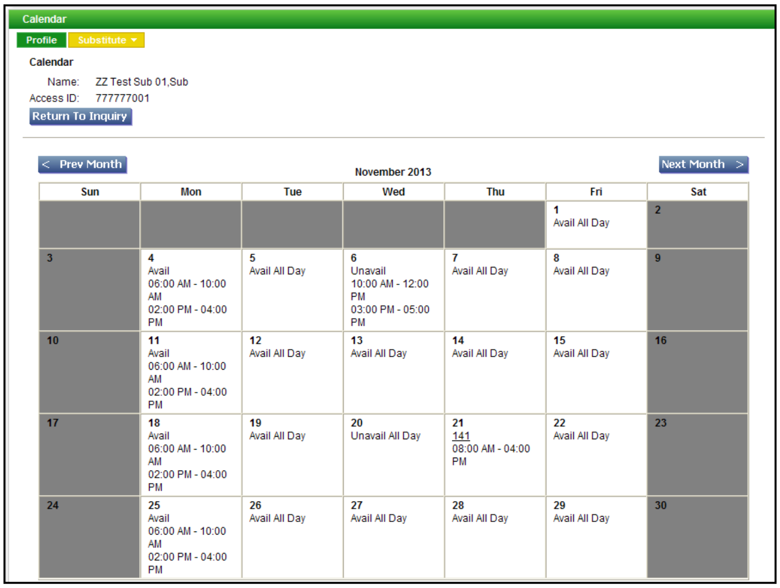


The *More Search Options* button displays additional search criteria to further define a search. Searches can be specified for a location, classification, location group, classification group, substitute, budget code, or reason. The Locations drop-down menu displays all authorized locations. The classification drop-down menu displays all authorized classifications. You can create a report based on the search results and export job information. Exported information can be used in other databases or applications.

Refer to the "*Completing the Employee Profile*" section for information on using the job inquiry, job report, and export screens.

Calendar

The assignment information for a substitute can be viewed in calendar format. The calendar displays the current month. Job detail information can be accessed from the calendar by pressing the **job number** link that displays under the calendar day. Non-workdays (based on their daily availability) are shaded gray. If the substitute is assigned to one or more jobs in a day, the job numbers will display with the start time. Availability times and unavailability times are displayed on the calendar. Selecting the **job number** link displays the Job Detail screen



Availability

The daily availability start and end time will display if the substitute meets the following criteria:

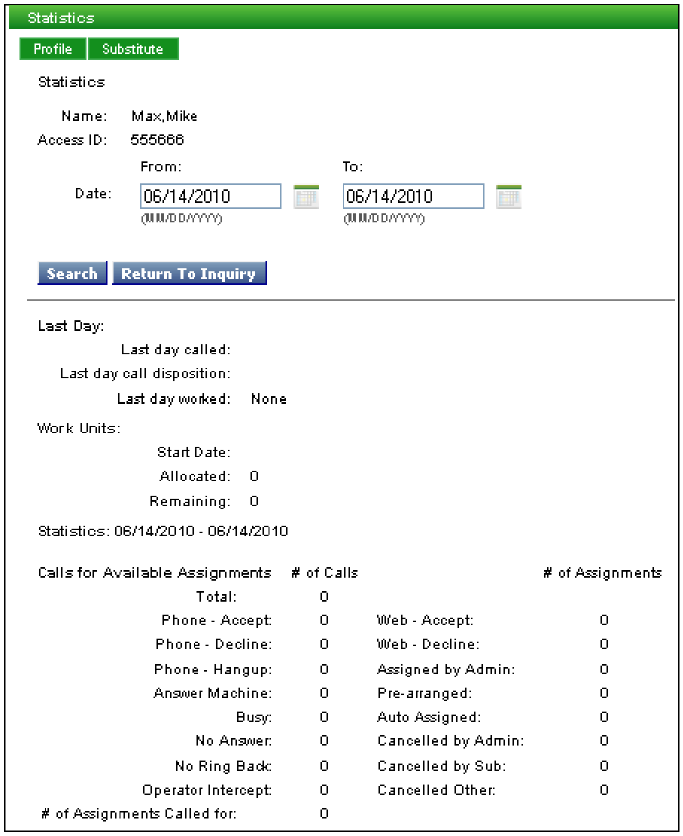
- The substitute has a status of "Active"
- "Available New Jobs" is enabled on the Profile tab
- The substitute does not have a job on that day
- The substitute does not have an expiration date on the Dates tab
- The substitute has daily availability for that day of the week on the Schedule tab
- An unavailability date has not been entered for that day on the Unavailable Dates tab.

Unavailable

If the substitute is not available, the "Unavail" label will display. If the substitute has an unavailability date, the start and end times of the unavailability is displayed. Multiple unavailable dates can be entered and displayed on the calendar.

Statistics

The Statistics screen displays Statistical information on calls made to the substitute. The information is divided into two sections: Work Units and Calls for Available Assignments. The date range defaults to the current date and the statistics display without having to press *Search*. A date can be specified by re-entering a date and pressing *Search*.

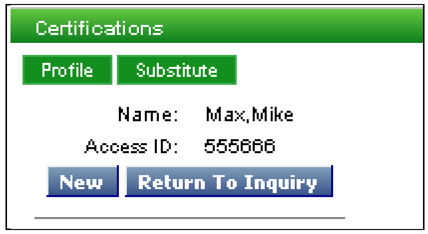


Field Name	**Description**
Last Day	The date entered for the search is not used when displaying “Last Day Called” information. The date, time, and disposition of the last call made to this substitute are displayed. The possible dispositions are listed below with a description (Calls for Available Assignments.)
Work Units	If this field is active, it displays the number of work units the substitute was allocated and how many remain for the specified period. Work units are set up on the Optional Information screen. A number is this field limits substitutes. If the allocated value is reached, the substitute can no longer be assigned to jobs. The operator typically resets and allocates substitute work units before the school year starts.
Statistics	Statistics are determined by the date range entered.

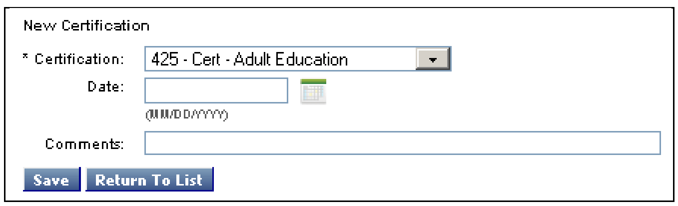
Field Name	Description
Adding/Deleting Certification Records Calls for Available Assignments	Displays the number of calls the system made to the substitute for available assignments by the following categories: Calls for Available Assignments: # of Calls - All Assignment calls the system made to the substitute. Calls for Available Assignments: # of Assignments - Number of times the system attempted to call the substitute to offer an available assignment. .
Phone - Accept	Number of times the substitute accepted a job via IVR Assigned or IVR Sub Search.
Phone - Decline	Number of times the substitute declined a job via IVR Assigned or IVR Sub Search.
Phone - Hangup	Number of times during Assignment Calls where an answer occurred, a substitute logged into the system, but then disconnected without an accept or decline action.
Answering Machine	Only applicable if the system parameter is on to "Assign Jobs to Answering Machine." The number of times a message was left of an assignment on an answering machine during Assignment Calls.
Busy	Number of times the system detected a busy line signal for Assignment Calls.
No Answer	Number of times that an Assignment Call was made, but no connection was established; or a connection was established but a PIN was never entered. This includes pickups by an answering machine and fax machine.
No Ringback	Number of times the system attempted to make an Assignment, heard dial tone, dialed the number, but never heard ringing that the call connected.
Operator Intercept	Number of times the system attempted to make an Assignment Call, heard dial tone, dialed the call and got a message from phone carrier that call could not be completed.
Web Accept	Number of assignments the substitute reviewed via the Web and selected to Accept.
Web Decline	Number of assignments the substitute reviewed via the Web and selected to Decline (they may review more assignments; this count is for the assignments they actually took the action to Decline).
Assigned by Admin	Number of assignments for the Substitute that were assigned by an Administrator.
Pre Arranged	Number of assignments for the Substitute that were assigned as a pre-arrangement.
Auto Assigned	Number of assignments for the Substitute that were assigned via the Auto Assignment step/rule.
Cancelled by Admin	Number of assignments the Substitute had, but cancelled.
Cancelled by Sub	Number of assignments the Substitute had, but was cancelled either by the job being cancelled or an Administrator cancelled their assignment.
Cancelled Other	Number of assignments the Substitute had, but was cancelled either by the job being cancelled or an Administrator cancelled their assignment.

Certifications

The Certifications screen stores certification information on the substitute. Certifications are defined and set up by the operator. Certifications are stored for data collection purposes and print on substitute reports. Substitutes can be searched by certification code.



Click *New* to display the New Certification screen. Enter the certification information and click *Save* to add the record to the substitute profile.

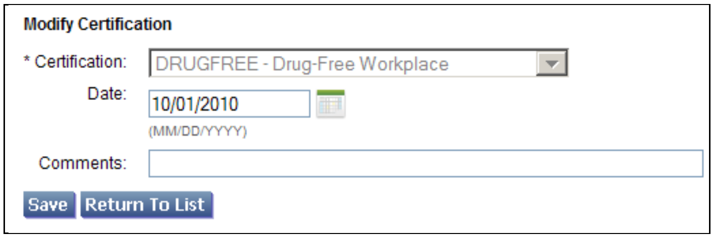


Field Name	**Description**
Code	The pull-down list displays authorized certifications.
Date	Enter a date in the correct format, or click the Date icon and select a date from the calendar.
Comments	Comments can include further details about the certification. This information cannot be used for a search.

To delete a certification record on the Certifications List, click the box next to the record you want to delete and click *Delete*. The certification record is removed from the substitute's profile.

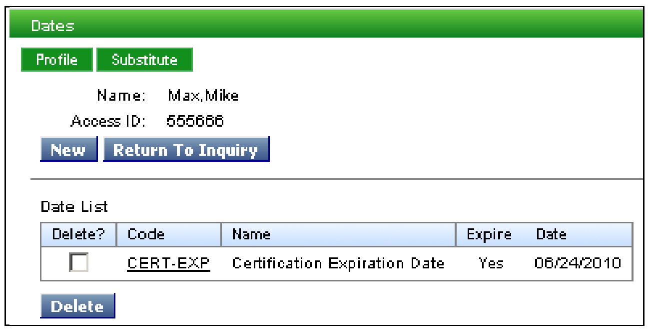
Modifying Certification Records

On the Certification List, click on the code you want to modify. The Modify Certification screen is displayed. Update the desired fields and click *Save*.



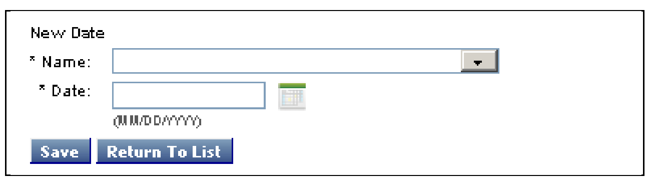
Dates

This screen is used to store dates on a substitute. Dates can include, birth date, hire date, certification date, termination date, etc. The date code setup defines whether the date is used to expire the substitute. Expired substitutes cannot be assigned to jobs.



Adding/Deleting Date Records

Click *New* to display the New Date screen. Enter the Date information and click *Save* to add the Date record to the substitute profile.

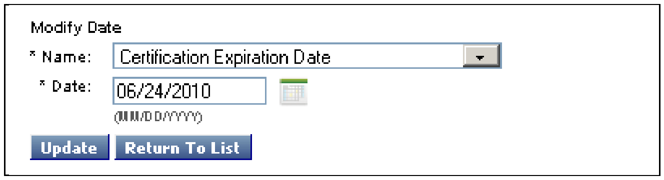


Field Name	Description
Name	The operator defines the dates that display on the pull-down list.
Date	Enter a date in the correct format, or click the Date icon and select a date from the calendar.

To delete a Date record on the Date List, click the box next to the record you want to delete and click *Delete*. The Date record is removed from the substitute's profile.

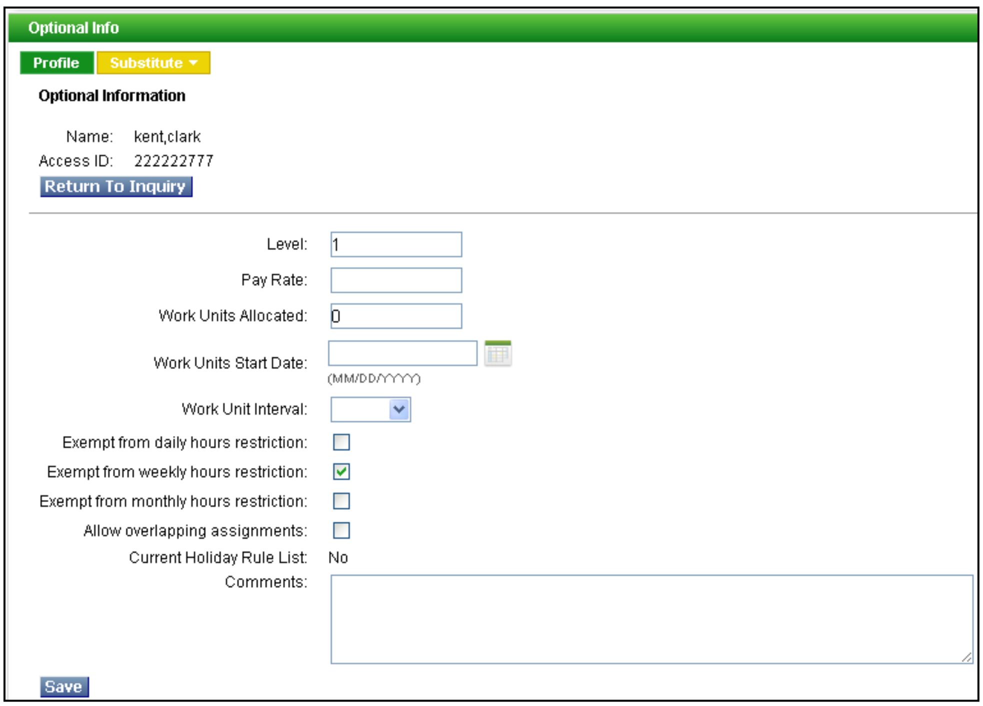
Modifying Dates

On the Date List, click on the code you want to modify. The Modify Date screen is displayed. Update the desired fields and click *Save*.



Optional Information

This screen allows you to enter optional information on a substitute. Enter the requested information and click *Save* to have this information added to the substitute's profile.



Field Name	Description
Level	The order in which the system calls the substitute can be leveled. When the system calls out from the General or Classification lists, the substitute with the lowest level number is called first. If calls were by seniority order, then the level would indicate a seniority level, such as their seniority date. The level can also represent a number that identifies certified personnel that would be called before non-certified personnel. Valid values are 1 – 99999999.

Field Name	**Description**
Pay Rate	Pay rate on the substitute profile is automatically inserted in a job record from the substitute profile when the job is assigned or re-assigned to a substitute during job creation, job modification, substitute call-out or substitute call-in. Pay rate can be updated from the job details screen, once there is an assigned substitute in the job and regardless of the job status. Pay rate displays on the job report and job export formats.
Work Units Allocated	The maximum work units correspond to the maximum number of units a substitute is allowed to work (typically within a year). Once that limit has been reached, the substitute will not be offered additional jobs and cannot call-in or search for and accept jobs. A work unit is defined for each classification code that is setup in the system. If a substitute has no limit, enter a value of zero (0) in this field. In this case, the substitute will not be restricted from jobs due to work units. To activate this feature, “Restrict Substitute to Maximum Work Units” must be checked on the Parameters - Substitute tab.
Work Units Start Date	Date that the allocated work units can be used for assignments.
Work Unit Interval	The time period (day, week, or month) to have the pool of maximum work units replenished for this substitute. A start date must be entered. The work units are replenished at the start of the specified time period. If an interval is not specified, the substitute will have only a single pool of work units.
Exempt from daily hours restriction	This field displays if the ‘Set maximum hours per day to *X*:’ parameter is enabled on the Substitute Parameters page, Hours Restrictor section. Checking this box exempts the individual substitute from the daily work hour restriction.
Exempt from weekly hours restriction	This field displays if the ‘Set maximum hours per week to *X*:’ parameter is enabled on the Substitute Parameters page, Hours Restrictor section. Checking this box exempts the individual substitute from the weekly work hour restriction.
Exempt from monthly hours restriction	This field displays if the ‘Set maximum hours per month to *X*:’ parameter is enabled on the Substitute Parameters page, Hours Restrictor section. Checking this box exempts the individual substitute from the monthly work hour restriction.
Allow Overlapping Assignments	Use this field with caution. This field should be checked for *phantom substitutes* only. Please review the discussion in the “Phantom Substitutes” section of this chapter. When this field is checked, substitutes can have overlapping assignments.
Current Holiday Rule List	This is a display-only field. A checkmark appears in this field if the substitute is on a current after-holiday rule list. A current holiday is determined by whether there is a holiday for the current system date.
Comments	Use this field to record information for which there is not a designated field, such as performance review information, complaints, commendations, special considerations, date and reason for an administrative action, etc. Substitutes cannot view the comments unless printed by the operator in a report. A person entered into the database, as both an employee and a substitute, do not share the same comments sections on the employee and substitute profile.

Priority List

The Priority List screen maintains the priority lists to which the substitute is assigned. Substitutes can be on multiple locations, location groups, and/or employee lists. Substitutes can also be assigned to Active Do Not Use, Inactive Do Not Use, Automatic Assignment, or Custom Lists.

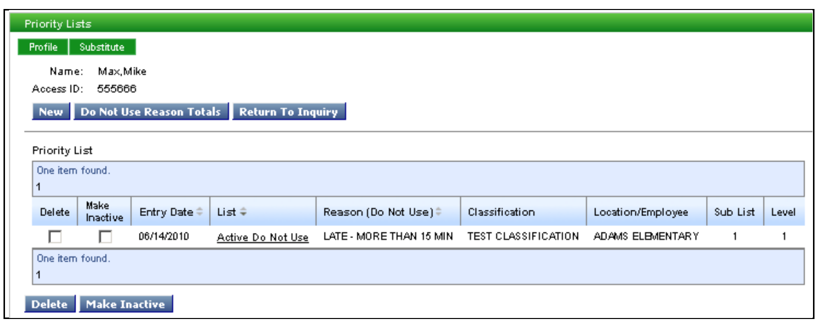
Priority lists are used to determine the order in which substitutes are called. The combination of lists, location groups, and types are entered in the search rule setup in order of calling priority. Priority Lists can also be defined using the Priority Lists menu item.

Administrative profiles with only view access rights will not have access to any buttons or links that would allow priority lists to be modified.

The use of priority lists is optional. If no priority lists are identified, substitutes are called from the Classification and General lists that use the setup on the Classification and Location screens. Priority Lists work independently from the classification and location screen setup.

From the Priority Lists screen, you can add the substitute to priority lists, review Do Not Use Reason totals, modify or delete priority lists and change the status of Active Do Not Use lists to Inactive Do Not Use.

Entries on the Priority List will always display the substitute's access ID for Operators. For administrators, the View Substitute ID parameter in Parameters – Administrator, Browser Access, must be enabled for the substitute's access ID to display in the results list.



Make Inactive

The "Make Inactive" feature enables administrators to change any Active Do Not Use entries to Inactive by checking the box next to the item. Active Do Not Use entries can be modified to Inactive Do Not Use; however, Inactive Do Not Use entries cannot be modified to Active Do Not Use. Inactive/Active Do Not Use entries can be deleted.

A substitute's Do Not Use reason count is determined by the total of Active plus Inactive Do Not Use entries per Reason. Deleted Do Not Use entries, active or inactive are not considered in this count.

Entry Date

The date shown in this field is the date the entry was added to the priority list. Entries in the system prior to Release 1.5 display the last modified date in this field.

Reason (Do Not Use)

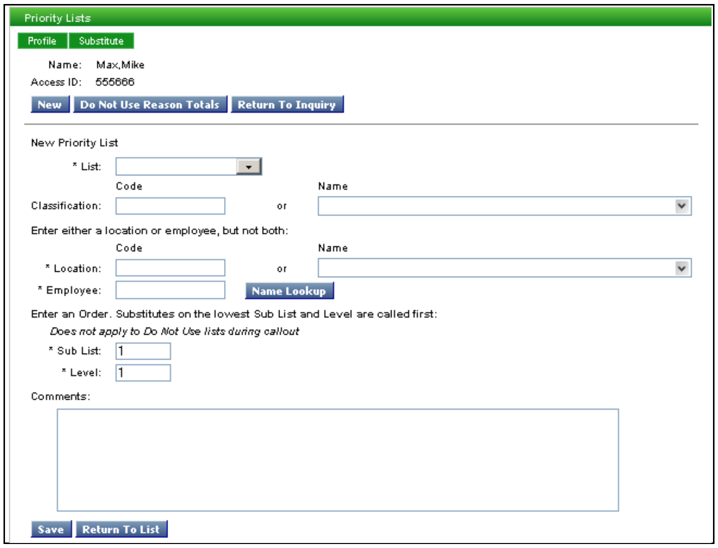
If a record does not have a reason populated, no reason will display in the Reason (Do Not Use) column for that record. The field will be blank.

Delete

To delete a Priority List, click the box next to the list you want to delete on the Priority List screen and click *Delete*.

Adding the Substitute to a Priority List

Click *New* to display the New Priority List screen. Complete the screen information and click *Save* to add the substitute to the priority list.

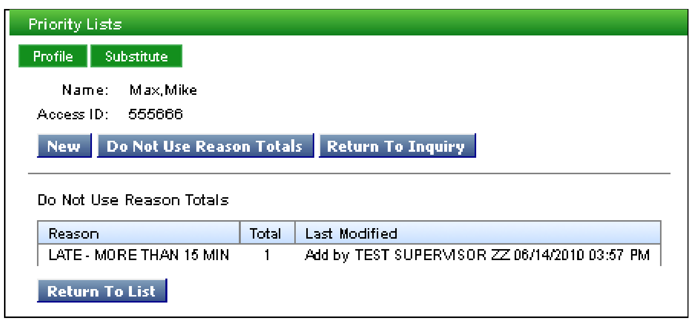


Field Name	Description
List	Select a list from the drop-down menu. The lists may or may not have a selection of a classification. Each list can be assigned to either an employee or to a location/location group. The Active Do Not Use, Inactive Do Not Use and Auto Assignment lists are offered to Administrators based on their administrative profile setup.
Reason	The Reason dropdown only displays when the list types of Active Do Not Use or Inactive Do Not Use are selected. The screen re-displays with the Reason drop-down field for selecting a reason.
Classification Code or Name	The classification determines the list to which the substitute is assigned. The code can be entered if known, instead of selecting a classification from the pull-down list.
Location Code or Name	The locations on the pull-down list are the locations found in the employee's profile. The code can be entered if known, instead of selecting a location from the pull-down list. Enter either a location or employee, but not both.

Field Name	Description
Employee Code/Employee	Enter the employee's ID or press the *Name Lookup* button (if visible) to search for the employee by name. Enter either a location or employee, but not both.
Sub List	A numeric value that indicates the order substitutes will be called. The substitute with the lowest number will be called first for an assignment.
Level	A numeric value that indicates the order substitutes will be called within a sublist. The substitute with the lowest number will be called first for an assignment. Level can be used to indicate seniority. An 8-digit seniority date can be entered for the level, such as 20040101.
Comments	Optional informational can be added on priority lists. This field is alphanumeric and up to 256 characters.

Reviewing Do Not Use Reasons Totals

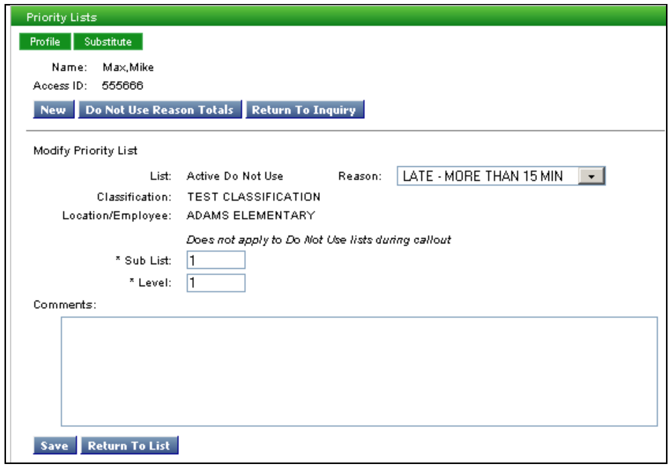
When the Do Not Use Reason Totals button is selected, the following page displays. This page lists each reason associated with this profile. The reason total represents the total active and inactive DNU entries for the substitute for the listed reason. The Last Modified field identifies the last action performed for the entry, the name of who performed the action and the date/time of the action (actions are add, change, delete). Valid actions that count towards the total are add and change actions. A deleted Do Not Use entry is not included in any count.



When a substitute's total for a Do Not Use reason reaches the configured alert threshold for that reason, either through manual entry or import, an email is automatically sent to system operators who are configured to receive Do Not Use threshold alerts.

Modifying Priority Lists

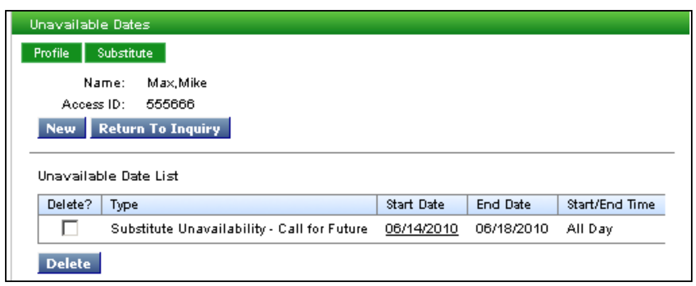
On the Priority List, click on the list you want to modify. The Modify Priority List screen is displayed. Update the desired fields and click *Save*.



Unavailable Dates

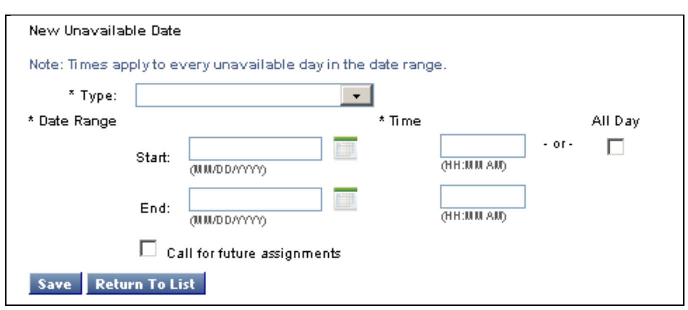
These dates represent periods when the substitute is not available for work. The substitute can enter unlimited periods of unavailability on the telephone or in the browser. The district can also enter a period of unavailability, which the substitute cannot change. Changes to unavailability dates are logged and reported on the substitute activity report. Unavailability affects telephone calling only. Substitutes can call or sign into the system and accept jobs that occur on these dates at any time. To prevent a substitute from searching and accepting available jobs, their setting for “Available for New Jobs” can be unchecked.

Use this screen to view, add, modify, and delete unavailable dates for the substitute.



Adding New Unavailable Dates

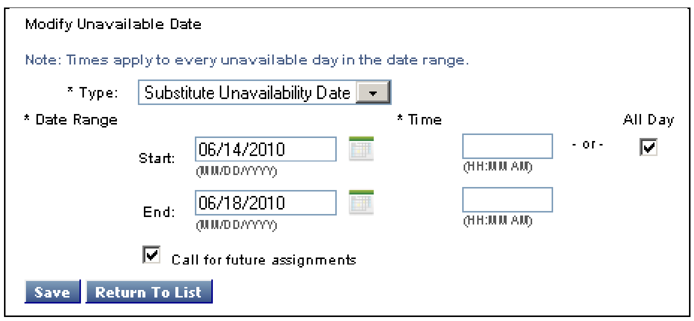
Click *New* to display the New Unavailable Date screen. Complete the screen information and click *Save* to add the unavailability date.



Field Name	**Description**
Type	Select Admin or Substitute to identify who requested the unavailability period. If "*Admin*" is selected, the substitute will not be able to modify or remove this date.
Date Range	Enter a date in the correct format or click the Date icon and then select a date from the calendar.
Time	Check "*All Day*" or enter a time range that applies to each day of the unavailability period.
Call for Future Assignments	Check this box to indicate if the substitute should receive calls for future assignments during the date/time specified.

Modifying/Deleting an Unavailability Date

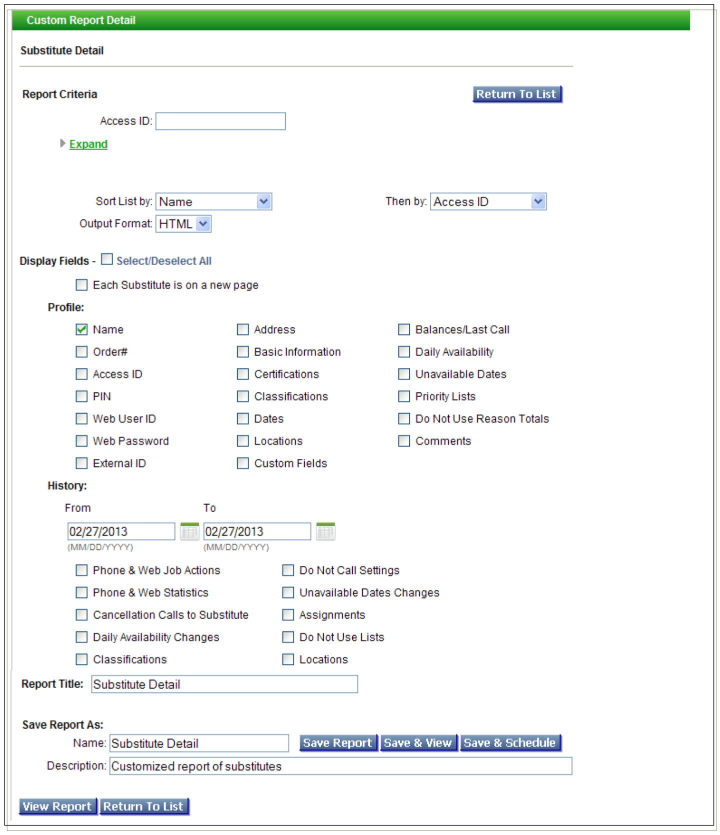
On the Unavailable Dates screen, click on the start date you want to modify. The Modify Unavailable Date screen is displayed. Update the desired fields and click *Save*.



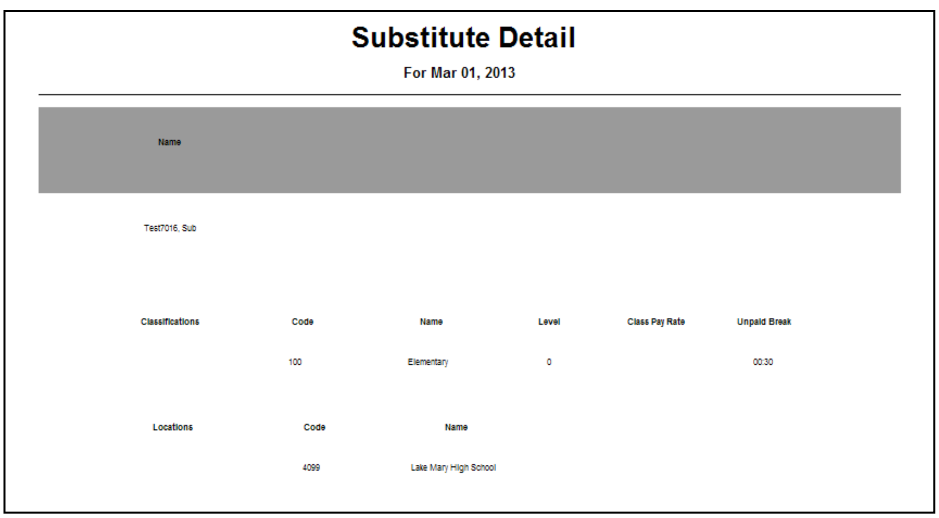
To delete an unavailability date record, click the box next to the record you want to delete and click *Delete*.

Report Detail

The Substitute Detail Report screen lets you select the information to include in the detail report. Click the box next to the information you want to include on the report. Click *View Report* to preview the report. The report automatically displays in the Adobe Acrobat reader.



Note: *The Web User ID and Web Password fields will only display if the district is configured to use these fields for SmartFindExpress web login. These fields would list after the PIN field.*



Absence Approval

The Absence Approval feature enables the system to require some absences to be approved before they occur. The approval requirement is based on the absence reason. Reasons are configured for Absence Approval on the Reasons, Absence/Vacancy page. When an absence is created for a reason that requires approval, the system automatically submits the absence request to the designated approvers in the system.

All Operator profiles can create absences for reasons set up to require approval without system intervention. All Operator profiles can approve or deny absence approval requests and modify absence approval information.

Administrator profiles must be configured for absence approval permission. On the Administrator Profile, Menu Access page, administrators can be setup with View/Modify permission or with View only permission. Administrators with View/Modify permission can approve or deny absence approval requests and modify absence approval information in the system. Administrators are given an approval level which determines the level of absence approval requests the administrator can approve, deny, or modify. Administrators with View only permission can view absence approval requests and add comments to the absence approval request record.

When an absence approval request is submitted, the system automatically routes the absence request to the designated approvers in the system. Operators/administrators receive notification on their home page when approval requests are submitted in the system for their approval level. Operators/administrators can access the Absence Approval page to approve or deny requests, review summary information, or to add/view approval comments associated with the request.

Several system features must be configured for Absence Approval to be operational in the system.

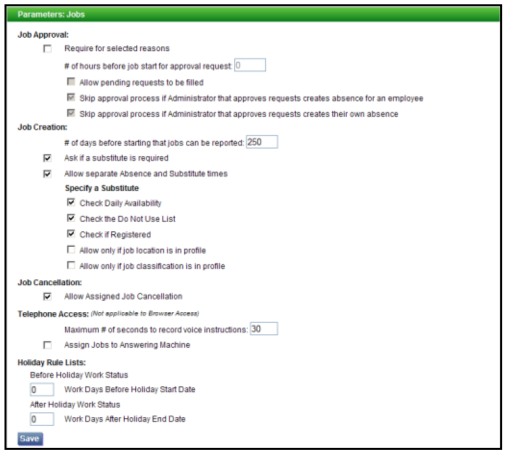
Note: *If the Absence Approval feature is disabled, menu options related to Absence Approval do not display for any users.*

Configuring System Parameters for Absence Approval

Parameters to configure Absence Approval have been added to the Parameters – Jobs page and to the Parameters – Emails page.

Parameters - Jobs

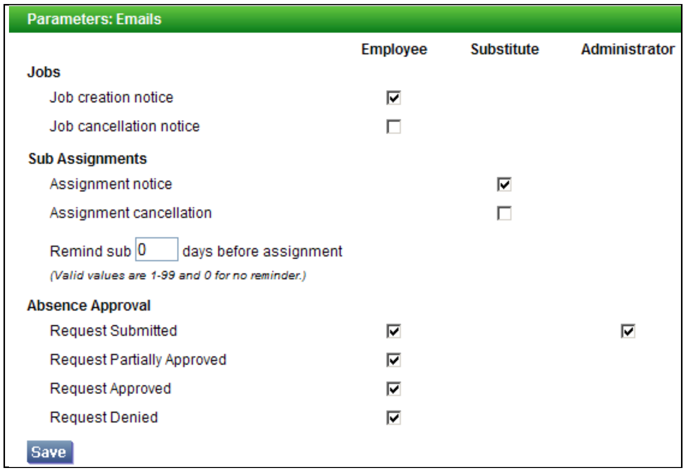
The parameters in the *Job Approval* section enable the Absence Approval feature and control its behavior in the system.



Job Approval Parameters	Description
Require for selected reasons	If checked, the Absence Approval feature is enabled in the system.
# of hours before job start for approval request	The value entered in this field determines the number of hours before a job starts that an approval request can be entered into the system. The system will not allow the request to be entered if the job's start time is less than the number of hours configured in this parameter. When an absence request is denied due to this parameter setting, the system sends an email to the administrator and to the employee to notify them of the denial.
Allow pending requests to be filled	If this option is checked, callout on jobs that are pending approval is allowed. When pending approval requests are allowed to be filled, the following behaviors occur: • The substitute assigned to the absence is not available for other jobs. • If the absence request is *denied* before the job starts, the job is automatically cancelled by the system and the substitute receives an assignment cancellation email and SCAN call. • If the absence is still *pending* at job start time, the job is not automatically cancelled by the system; however an administrator can manually cancel the job. The job goes into Finished status, with an "approval pending" status. The job can still have an assigned substitute, if the district was allowing jobs to be filled before approval.
Skip approval process if Administrator that approves requests creates absence for an employee	If enabled, the approval process is skipped for this administrator-created absence.
Skip approval process if Administrator that approves requests creates their own absence	If enabled, the approval process is skipped for this administrator-created absence.

Parameters - Emails

Absence Approval email notifications can be sent to employees and administrators when absence approval requests are submitted, partially approved, approved or denied.



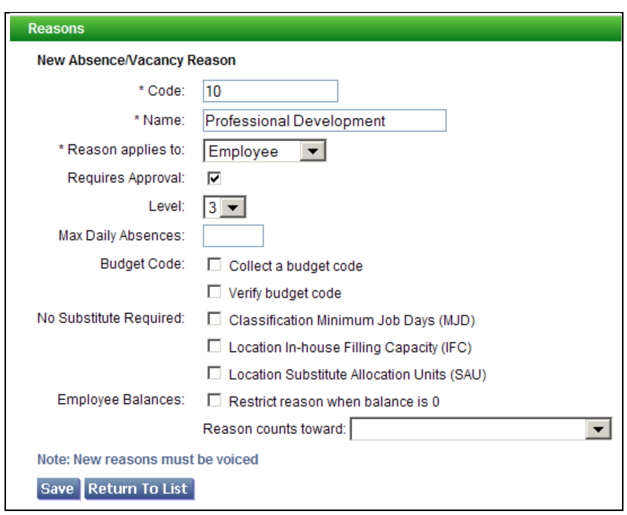
Employees can receive email notification when a request is submitted, partially approved, approved or denied. Administrators can receive email notification when a request is submitted for their approval level.

Configuring Reasons for Absence Approval

Reasons can be configured to require absence approval and absence approval levels can be assigned.

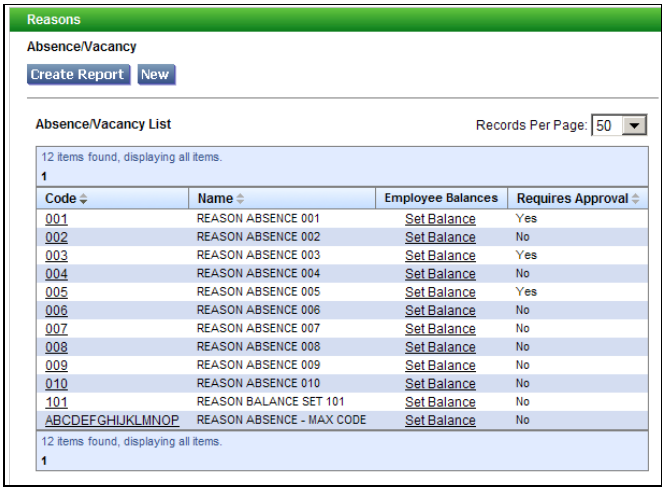
New Absence/Vacancy Reason

The 'Requires Approval' and 'Level' fields are used for the Absence Approval feature. If the Requires Approval option is checked for a reason, the reason will require absence approval. A checkmark in this field enables the Level field. The Level field is used to specify the level of approval required for the reason. Approval levels are from 1 through 5. Level 1 is the default and level 5 is the highest approval level that can be assigned. The approval level assigned to a reason determines the administrator profiles that can approve absence requests for the reason. Administrators are assigned Absence Approval level permission on their Profile - Menu Access page.



Reasons - Absence/Vacancy

The Requires Approval column on the Absence Vacancy List shows whether the absence/vacancy reason is configured to require absence approval.



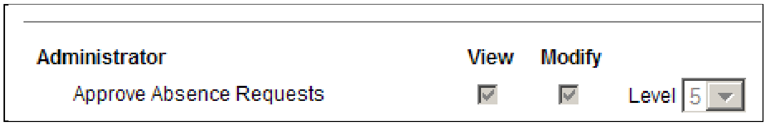
Reasons
Absence/Vacancy
Create Report New
Absence/Vacancy List
Records Per Page: 50
12 items found, displaying all items.
1

Code	Name	Employee Balances	Requires Approval
001	REASON ABSENCE 001	Set Balance	Yes
002	REASON ABSENCE 002	Set Balance	No
003	REASON ABSENCE 003	Set Balance	Yes
004	REASON ABSENCE 004	Set Balance	No
005	REASON ABSENCE 005	Set Balance	Yes
006	REASON ABSENCE 006	Set Balance	No
007	REASON ABSENCE 007	Set Balance	No
008	REASON ABSENCE 008	Set Balance	No
009	REASON ABSENCE 009	Set Balance	No
010	REASON ABSENCE 010	Set Balance	No
101	REASON BALANCE SET 101	Set Balance	No
ABCDEFGHIJKLMNOP	REASON ABSENCE - MAX CODE	Set Balance	No

12 items found, displaying all items.
1

Configuring Administrators for Absence Approval

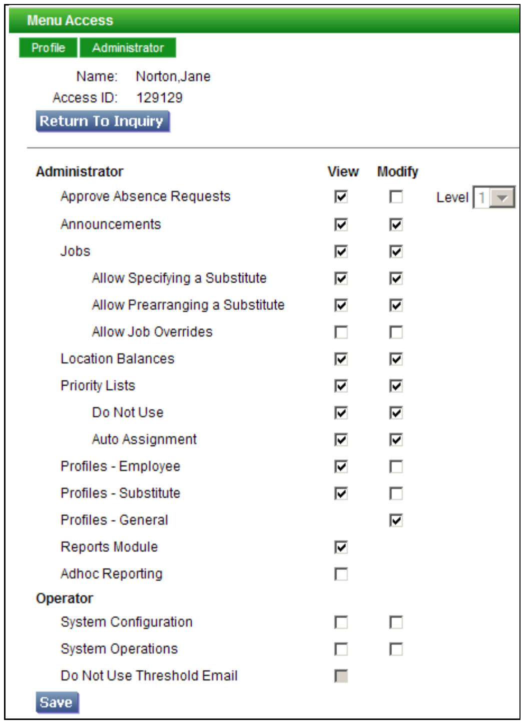
System operator profiles automatically have full absence approval View/Modify rights. On the Menu Access page of an operator, the Approve Absence Requests fields are enabled and grayed-out. All operators have an approval level of 5. Level 5 is the highest approval level and is automatically assigned to all system operators.



Operators can approve or deny absence approval requests and modify absence approval information. Operators can create absences for reasons configured to require approval without the absence entering the approval process.

When an operator or administrator creates an absence and then changes the reason for the absence to a new reason that requires approval, the job goes back into a “pending approval” status.

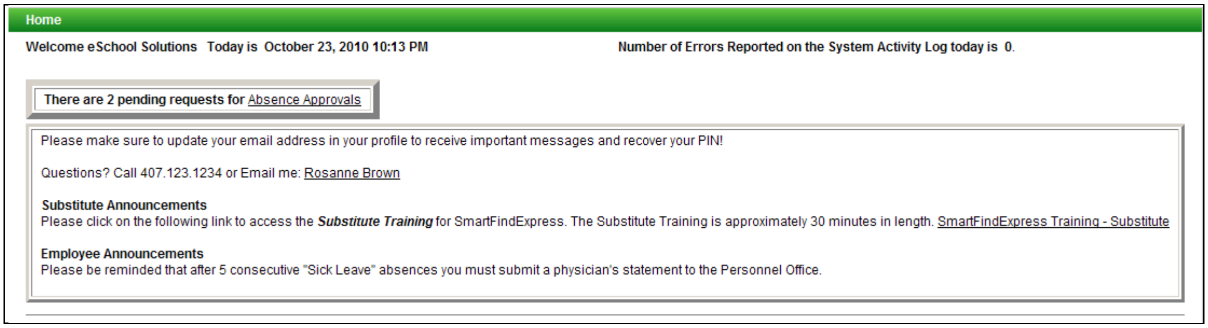
Absence Approval permissions for site administrators must be configured on the administrator’s Menu Access page. Administrators can be configured with View only rights or with View/Modify rights. Modify rights enable an approval level to be assigned to the administrator. The Level determines the absence approval requests that an administrator can approve, deny and modify.



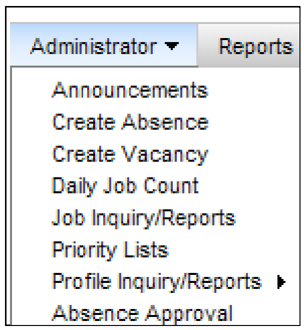
Approve Absence Requests Field	
View	Administrators with "View" only permission cannot approve or deny absence approval requests. Administrators can review/monitor absence approval requests for their location and add comments to absence requests on the Absence Approval History page. Comments can provide useful information to the approvers about the absence request.
View/Modify Level	Administrators with View/Modify rights can approve/deny absence requests and modify absence request information. The Modify field enables the Level field. The Level determines the absence requests that an administrator can approve in the approval process. Level 1 is the default approval level and Level 5 is the highest approval level. Administrators assigned a Level 1 approval level can approve absence requests that require a Level 1 approval for locations in their profile; administrators with a Level 2 approval level can approve requests that require a level 2 approval for locations in their profile.

Absence Approval Requests – Home Page Notification

The Administrator home page displays an "absence approval pending" message when there are absence approval requests for the administrator's approval level. The message will show the number of pending requests waiting approval and provide a link to the Absence Approval page.



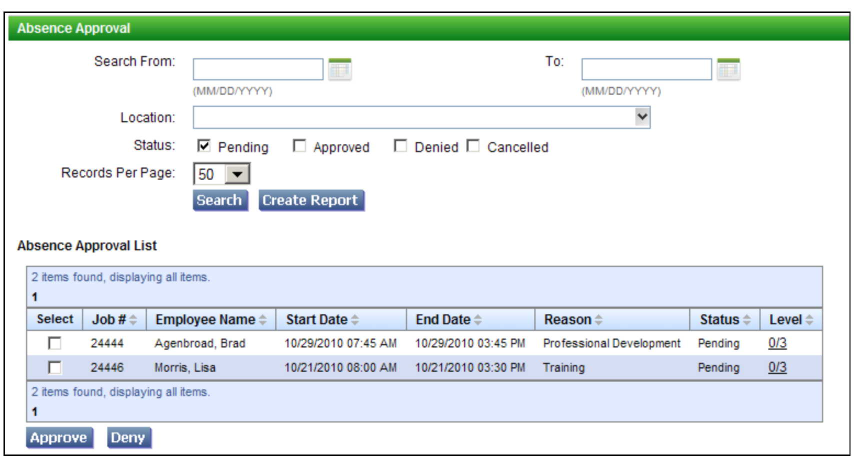
The Absence Approval page can be accessed by clicking on the link in the notification message, or by selecting the Absence Approval option from the Administrator drop-down menu.



Absence Approval Page

The Absence Approval page automatically displays any pending requests for an administrator’s approval level and below. Administrators can approve/deny absence approvals and view the history of actions for a request.

Administrators can also use this page to search for existing and future absence requests by date, location and approval status. The Location drop-down will display all locations and location groups in the administrator’s profile (according to the administrator’s Location Access). Multiple statuses can be included in the search criteria.



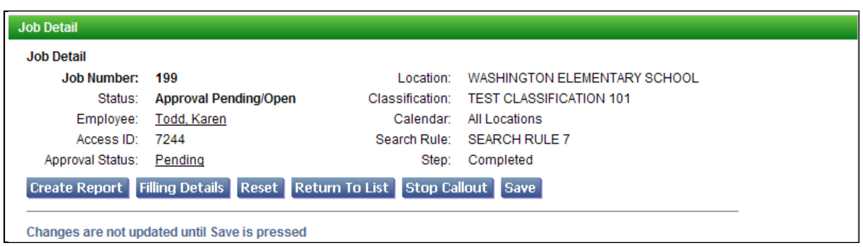
Absence Approval List

The Absence Approval List displays pending approval requests or after a search is performed, displays the approval requests that matched the search criteria. The following details are provided for absence approval requests:

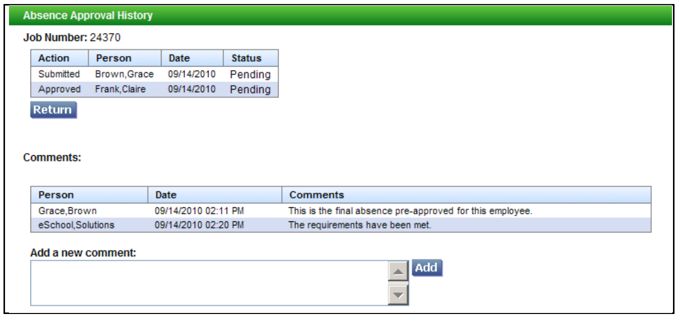
Field	Description
Select	A checkbox indicates that the administrator can approve/deny the request.
Job #	The job number for the absence.
Employee Name	Name of the employee for whom the absence was created.
Start Date	The start date for the absence.
End Date	The end date for the absence.
Reason	The reason the absence was created.
Status	The current status of the absence request.
Level	Specifies how many levels of approval are required for the absence reason. Approval levels are from 1 through 5, with 5 being the highest level of approval. Level 1 is the default value. **NOTE: In order for the absence to go through the full approval process, there must be an administrator with approval access at each level. Levels cannot be skipped.** The first number in the Level field represents the level of approvals obtained for the request; the second number represents the approval level required for the request. For example, a level of "0/1" indicates that the absence request requires a Level 1 approval and that the approval has not yet been obtained. Clicking on the Level link displays the Absence Approval History page for the request. The history page contains additional information on the actions performed on the request and allows for comments to be added to the history information.

Absence Approval History Page

The history for a specific request can be displayed by clicking the Level link on the Absence Approval page or by clicking the Approval Status link on the Job Detail page.



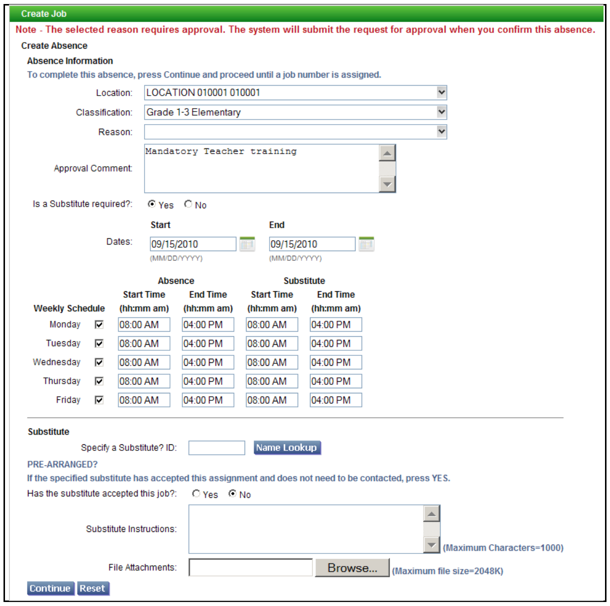
The history provides valuable information on the actions that have occurred since the request was entered into the system and provides for additional comments to be added to the request.



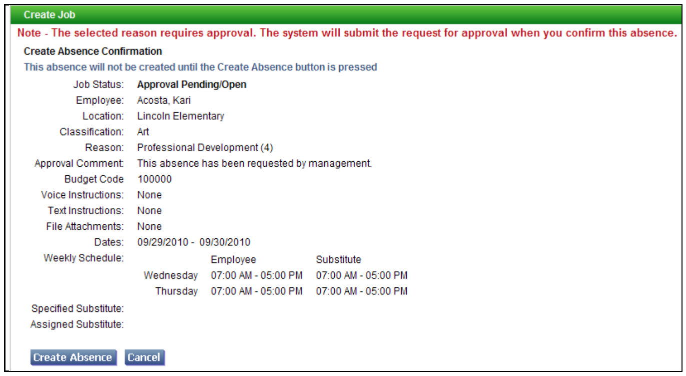
Field	Description
Action	The action(s) taken on the request (request submitted, approved, email sent to admin, email sent to employee).
Person	Name of the employee or administrator who submitted the request.
Date	Date the request was submitted.
Status	Current status of the request.
Comments	Displays comments entered about the request and allows new comments to be added. Comments on the request can also be entered on the Job Create form in the Approval Comment field.

Creating Jobs without Absence Approval Rights

When administrators without absence approval permission create absences for a reason that requires approval, the following message displays on the top of the create form, "*Note: The selected reason requires approval. The system will submit the request for approval when you confirm the absence*."The administrator can continue to create the absence or use a different reason for the absence.



When an absence is created for a reason that requires approval, the Create Absence form contains an additional field, *Approval Comment*, that can be used to provide additonal information on the reason for the absence request -- information that may be helpful to the approvers. Once the absence is created, the request is submitted for approval. The job is created with the status of "Approval Pending/Open."

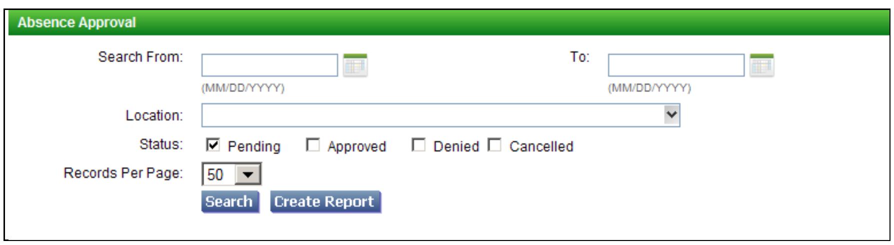


Absence Approval Emails

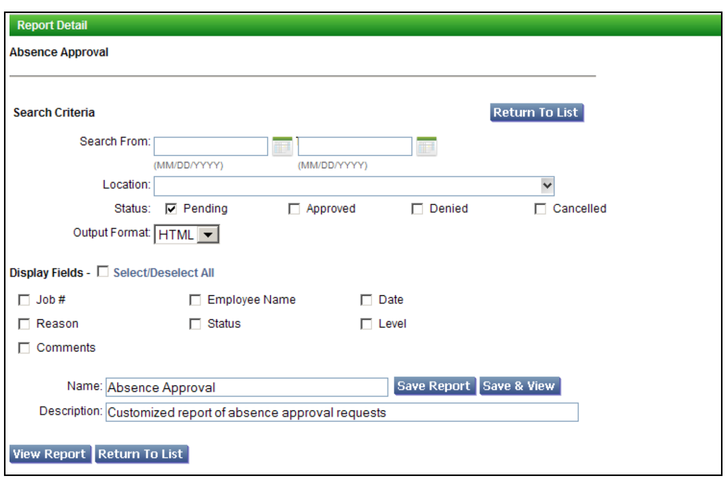
When an absence approval request is submitted, partially approved, approved or denied, the employee receives an email notification. Administrators receive email notification when an absence request is submitted for their approval level.

Absence Approval Reports

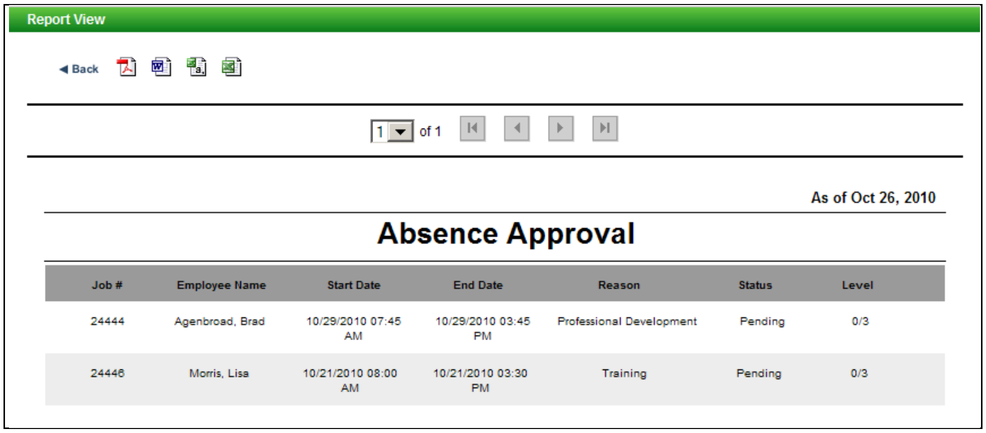
Administrators can create Absence Approval reports from the Absence Approval page.



Clicking the Create Report button displays the report setup page. After entering the search criteria, check the boxes for the information you want to appear on the report from the Display Fields section. A name can be entered for the report. Choose to save, save and view, or view the report. When you save the report, it is saved to your “My Saved Reports” folder. The “My Saved Reports” folder is accessed from the Reports menu.



Click the Save& View or View Report option to display the report. The report can be exported to any of the formats displayed at the top of the report page. Click on an export icon to open or save the report information in the export program.



As of Oct 26, 2010

Absence Approval

Job #	Employee Name	Start Date	End Date	Reason	Status	Level
24444	Agenbroad, Brad	10/29/2010 07:45 AM	10/29/2010 03:45 PM	Professional Development	Pending	0/3
24446	Morris, Lisa	10/21/2010 08:00 AM	10/21/2010 03:30 PM	Training	Pending	0/3

Job Status –Approval Request Canceled

When a job is canceled, the approval request is automatically canceled. A request can only be canceled if the job is canceled. When a job is canceled for a request that has a status of Unapproved or Partially Approved, the request status becomes “Canceled.” When a job is canceled for a request that has a status of Approved or Denied, the request status is unchanged.

Job Status – Approval Request Denied

When a request is denied, the system automatically cancels the associated job. The history on the request is maintained in the history log and the request’s job details can be viewed. The request is removed from the approval process. When a request is denied on any level, the job is canceled and the request is removed from the approval process.

When a job is removed from the system, the approval records and approval history are also removed.

Job Modify Scenarios for Absence Approval Requests

This section illustrates several job modification scenarios that can occur when Absence Approval is enabled:

- Administrators with and without absence approval privilege can modify information on the job. The job is still processed through the normal approval process; *it is not automatically approved if an administrator with approval privilege modifies the job’*

- Job modify: Start Callout button selected with the ‘Allow pending requests to be filled’ parameter unchecked/disabled on the Parameters – Jobs page: When any administrator selects the ‘Start Callout’ button on the page, the following error message displays, ‘Callout cannot start on this job until it is approved by all required levels.
  - The job approval status does not change.

- Job modify: Start Callout button selected with the ‘Allow pending requests to be filled’ parameter checked/enabled on the Parameters – Jobs page: When any administrator selects the ‘Start Callout’ button on the page, the following warning message displays, ‘This job is pending approval. Are you sure you want to start callout for this job? Yes, No.

- Whether they select Yes or No, the job is still in “approval pending” and will be routed by the system through the approval process. The job approval status does not change.

- Job modify: Change reason from one that requires approval to a reason that does not require approval: Any administrator can change the reason. The following warning message displays, ‘The modified reason does not require approval. Clicking ‘Continue’ will remove this job from the approval process. Continue, Cancel.
  - When it is removed from the approval process, the status is updated to a normal, non-approval type status, such as Active, Open, etc. On the approval history log, the status will show as, “Reason modified - no approval required.”

- Job modify: Change reason from no approval required to one that requires approval: Any administrator can change the reason. When the reason is changed to another reason that requires approval, the job goes back into “pending approval” status.
  - If no Assigned substitute in the job & Allow job filling/shopping can be off or on.
    The following warning message displays: ‘The modified reason requires approval. Clicking ‘Continue’ will place the job in the approval process. Continue, Cancel.’
  - If Assigned substitute in the job. Allow job filling/shopping can be off or on.
    The following error message displays: ‘The modified reason is not allowed because it requires approval and a substitute is already assigned.

Other System Reports with Absence Approval Information

Absence Approval information is included on multiple system reports including the Administrator Profiles report, Daily Job Counts page of the Job report, and the Job Filling Details report. Refer to those specific reports for more information.

System Operations Menu

System Operations features enable you to maintain functionality and data across your system. The following features are accessed from the System Operations menu.

Feature	Description
Import/Export	Imports profile information into the SmartFind*Express* database from other systems, and exports job information from the database to other databases or applications.
Substitute Availability	Provides a snapshot of how many substitutes are available in your database for assignments for the current day and time.
System Activity Log	Displays system activity records in the form of informational messages or error messages for various system programs. Pinpoints error conditions that can lead to system malfunctions.
Tools	Allows mass updates to substitute information to be performed with one action.
# Days Worked	Displays the days and/or work units worked by an employee or substitute during a specified period.
Bulk Job Cancelation	Enables operators to cancel jobs for a selected day by individual Calendar or by Location/Classification.

Import/Export

The Import/Export feature allows you to import profile information into the SmartFind*Express* database from other systems and export job information from the SmartFind*Express* database to other databases or applications. This feature consists of the following components:

- Scheduled Import
- Import Profiles
- Export Jobs
- Processed Import/Export List

Importing can be used to add new records to the database, change existing records, or delete existing records from the database. Exported job information can be used to update other computer systems with employee leave information and substitute payroll information.

SmartFind*Express* uses *Transactional* or *On-demand* as its import/export frequency. *Transactional processing* creates a transaction each time a change occurs in a job record, while *On-demand processing* is a one-time occurrence.

The parameter "*# of days to keep Import/Export logs,* located on the Parameters – Configuration tab," determines the length of time data is kept in the system.

Transactional Processing

Networking software must establish a direct and continuous connection between the two systems. A method must be identified for this process and a determination made regarding software that may be required for this connection. The software would allow eSchool Solutions' computer to "Map a Drive" to the second computer. Once the connection is established, data will be processed according to the schedule entered for the transactional processing. Both importing and exporting of data can be scheduled using the transactional method.

Examples of Transactional processing:

Importing Employee information:

Once a day, the host computer produces a text file of all the changes made to employee records. There may be new hires, changed positions, changed locations, or terminated employees. This transaction file is placed on the host computer in a directory for system processing.

Importing Substitute information:

Once a day, the host computer produces a text file of all the changes made to substitute records. There may be new substitutes, changed information, or terminated substitutes.
This transaction file is placed on the host computer in a directory for system processing.

Importing System information such as locations, classifications, budget codes:

The host computer has the required system information for SmartFind*Express*. When location, classification, or budget code information is available, a text file is generated and placed on the host computer in a directory for system processing.

Exporting Absence and Substitute information:

- An employee calls in an absence and receives a Job number.
- SmartFind*Express* creates a Job record (identified by the Job number) and immediately transfers that Job record to the host computer.
- SmartFind*Express* calls and assigns a substitute to that Job record.
- SmartFind*Express* updates the Job record and immediately transfers an updated Job record to the host.
- The job finishes when the end time of the Job is greater than the current time of day.
- SmartFind*Express* updates the Job record and immediately transfers an updated Job record to the host.

Import Record Processing

Import files can be separate files for each file type or can contain multiple record types. Based on the schedule, the import will check the folder specified and process the files found in that directory. Once the file is processed, it is deleted. The system activity log will record the successful updates to the database processed by the import. Selecting the *Import/Export* menu item, the *Processed* tab and then the transactional import link, will display any errors that occurred during the import.

Refer to the "*Imports Layouts"* document for detailed information on the SmartFindExpress import layouts.

Lenient Import Processing Parameter

This system-level parameter allows districts control over how strictly import records are processed. The setting is contained with other background parameters established during system setup. The parameter is an ON/OFF setting for lenient import processing.

- **OFF**: If a record is imported to “Add” data, but the system finds the key fields for the record already in the system, it fails the record (and provides an error message). If a “Change” record is imported, but the system does not find the key fields to make the change, the system fails the record (and provides an error message).
- **ON**: If a record is imported to “Add” data, but the system finds the key fields for the record already in the system, it will process the record as a ‘Change’ record. If a “Change” record is imported, but the system does not find the key fields for the record, the system will process the record as an ‘Add’ record.

Export Record Processing

Export layouts are found in “*Export Layouts”* document.

Job Records are appended to a temporary file on the SmartFind*Express* server and written to the path specified on the transactional schedule only when the file name does not exist. After the host computer processes an export file, it must delete the file in order to signal the transactional scheduler to create another file. Selecting the *Import/Export* menu item, the *Processed* tab and then the transactional export link, will display the transactions that were processed.

Export information can be used to generate payroll transactions that determine a substitute’s pay or update employee leave/absence information. Using the exported job records in other computer systems may involve such tasks as:

- Translating codes to codes used on the host computer system
- Ensuring the correct budget code is assigned
- Determining the rate of pay for a substitute
- Determining the number of consecutive days worked

Transactions are passed to the "host" computer whenever a change occurs to a job record.

Example: Single-day absence transaction:

Step 1:

- An employee calls and reports an absence. Job #12345 is created.
- A real-time transaction record is passed to the "host" (new).

Job#	Start Date	End Date	Reason	Employee	Status
12345	09/01/2005	09/01/2005	001	123456789	O

Step 2:

- SmartFind*Express* calls out and a substitute accepts job #12345.
- A real-time transaction record is passed to the "host" (update).

Job#	Start Date	End Date	Reason	Employee	Status	Sub
12345	09/01/2005	09/01/2005	001	123456789	A	456789123

Step 3:

- The current time of day equals the time of the job and the job goes to finished status.
- A real-time transaction record is passed to the "host" (update).

Job#	Start Date	End Date	Reason	Employee	Status	Sub
12345	09/01/2005	09/01/2005	001	123456789	F	456789123

Example: Multiple-day absence transaction:

Step 1:

- An employee calls and reports an absence. Job #12346 is created.
- A real time transaction record is passed to the "host". (new).

Job#	Start Date	End Date	Reason	Employee	Status
12346	09/01/2005	09/02/2005	001	123456789	O

Step 2:

- SmartFind*Express* calls out and a substitute accepts job #12346.
- A real-time transaction record is passed to the "host" (update).

Job#	Start Date	End Date	Reason	Employee	Status	Sub
12346	09/01/2005	09/02/2005	001	123456789	A	456789123

Step 3:

- The current time of day equals the time of the job and the job goes to finished status.
- Two real-time transaction records are passed to the "host". A finished day segment is sent (update) and the remaining active/open segment (new).

Job#	Start Date	End Date	Reason	Employee	Status	Sub
12346	09/01/2005	09/01/2005	001	123456789	F	456789123
12346	09/01/2005	09/02/2005	001	123456789	A	456789123

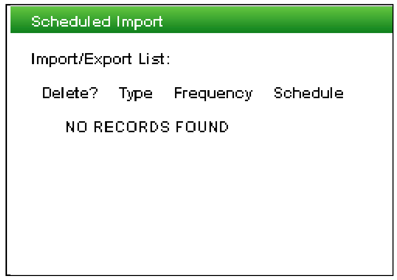
When jobs are removed, jobs that are "*nnn*" days old (based on the parameter setup), no transaction records are passed to the host. The host must have its own program to remove historical records.

To determine whether the record should be replaced or inserted, the job number and the start date can be used. In SmartFind*Express*, the start date can be modified. This situation can create orphaned records on the host system when the job number and start date is the key to inserting or replacing records. If the job is "*Open*" or "*Active*", the job record can be replaced, based on the job number. If the job is in the "*Finished*" or "*Verified*" status, the job number and start date must be used to determine when the record should be inserted or updated.

Every time a record is exported, a record is written on the export log file. The log file is used as an audit trail of when transactions are written to the export file.

Scheduled Import

The Scheduled Import tab displays the scheduled imports and exports that are active in your system. Import and export records can be added, modified or deleted. To delete a scheduled import or export, click the deletion box next to it and then click *Delete.* To modify information, click the Type link for the import or export to display the modify screen.

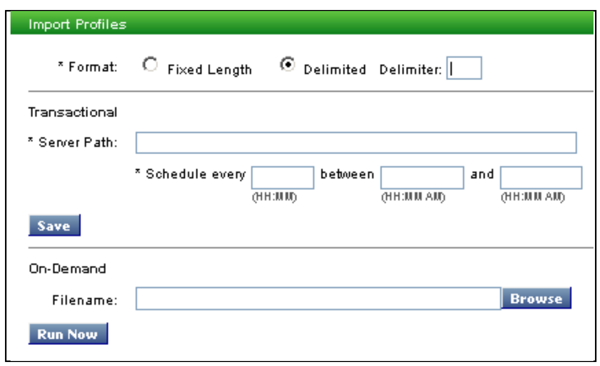


Import Profiles

The Import Profiles feature allows you to import profile information into the SmartFind*Express* database from other systems. Importing can be used to add new records, change, or delete existing records from the database. The record command in the import file directs which action the system should perform on the database (add, change or delete). The file format controls the data that is placed in each field in the tables and database. The import format for each data type is unique. Refer to the "*Import Layouts*" document for detailed information on import formats.

NOTE: *Importing can be used to modify large amounts of data in a short amount of time. The additions, changes, and deletions are made immediately. There is not an option to undo the import. It is recommended that you are certain of the impact of the data modifications before importing.*

Imports can be set up as transactional or on-demand. For the transactional import, enter the required information (server path and schedule) and then click *Save* to add the schedule to the database. For the on-demand import, enter the filename or choose *Browse* to find the file and then click *Run Now* to start the import process. The *Return to List* button returns you to the Import/Export screen without importing the profile information.



Field Name	**Description**
Format	Select either Fixed Length or Delimited as the format for the import. • *Fixed length* (refers to the SEMS 3.0 formats) This file format allows you to continue to use the SEMS file format that our existing SEMS customers are accustomed to using. This is a 350-byte fixed length file. • *Delimited (refers to the SmartFindExpress formats)* - the default format with a | (pipe) delimiter. You may choose another delimiter for your file format. Keep in mind the characters you may have in you file. For example, we do not recommend you use commas, or asterisks as your delimiter as they may appear in your file. The delimiter can be changed to fit the file format you have created or have been given.

Transactional:

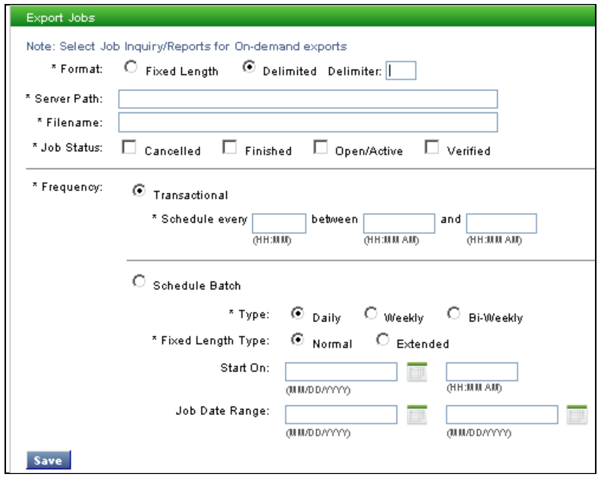
Field Name	**Description**
Server Path	The import file's location on the server, other machine, or drive where the file resides. Example: M:\Human Resources\Data\SmartFindExpress\People1add. The server path may or may not include a filename. If a file name is not present, the import will process all files found in the directory name. When the import server path is the same as the export server path, the filename should always be included. **Note**: *Files are processed by date/time stamp order on the modify date of the file.*
Schedule	Indicate how often and between what start and end times the system should check for the import file and run it. Hours can be between 0 and 9999. Minutes can be between 0 and 59. These fields cannot be left blank. For example, to have the system check for imports every hour, enter one hour (1:00) in the "E*very*" box and set your schedule between 12:01 am and 11:59 pm. **Note**: *Files are processed by date/time stamp order on the modify date of the file.*

On-Demand:

Filename	Enter the drive, folder and file name of the import file or click *Browse* to browse your computer to select the file for import. On-demand imports will not appear on the list of scheduled imports.

Export Jobs

Job information can be exported on a transactional or scheduled batch basis. Use the *Job Inquiry/Reports* feature to set up on-demand or a one-time export of job information. To schedule the export, enter the required information for either the transactional or scheduled batch export method and then click *Save* to add the export schedule to the database.



Field Name **Description**

Format

- *Fixed length* (refers to the SEMS 3.0 formats) – There are two options with the fixed length format: normal and extended. Normal produces a text file with a record for each job in the search results, and extended produces a text file with a longer record for each job in the search results. The default is "normal."
- *Delimited (refers to the SmartFindExpress formats)* - the default format with a | (pipe) delimiter.

  You may choose another delimiter for your file. Keep in mind the characters you may have in you file if you are going to re-import the file or import into another program. For example, using a comma as a delimiter. The *Name* field may be separated by a comma-- (Last name, First name). If importing into Excel and you choose comma as your delimiter, the last name and first name will be separated.

Server Path

The location of the export files on the server or drive letter. I:\Payroll\

Filename

The name of the export file. Example: Payroll.txt

Job Status

Indicate the type of job information to be exported. You can export information on cancelled, finished, open/active or verified jobs. More than one job status can be chosen at a time.

Frequency

Choose either Transactional or Schedule Batch for the frequency of the export.

If transactional, indicate how often and between what start and end times, the system should write job transactions to the specified directory.

If schedule batch, enter the following information:

- Select daily, weekly, or bi-weekly as the batch frequency. A batch type is required.
- If fixed length is selected, choose the type of fixed length file, either normal or extended.
- Enter the start date and time for the batch export in **mm/dd/yyyy** and **hh:mm am** format. The schedule is required.
- Select the job date range using the Calendar button for the job information to include in the batch export.

Note: *For a scheduled batch, the next scheduled date and job date range are automatically updated by the system. For example, if the type is daily, the system adds 1 day, if weekly, it adds7 days, If bi-weekly, 14 days. All jobs within that date range will be exported.*

Processed Import/Export List

The Processed tab provides access to the list of imports and exports that have already been processed. The *"# days to keep import/export logs"* found on the Parameters – Configuration tab determines when information is removed from this list. Click the Type link for the import or export to view the report. The report automatically displays in the Adobe Acrobat reader.

Processed Import/Export List

Type	Frequency	Started On	Path/Filename
Import	On-Demand	10/28/2010 03:05 PM	ExportEmployeeBasicInfo-201010281503.txt
Import	On-Demand	10/28/2010 02:58 PM	export 1 profile.txt

For imports, the report shows all errors that occurred when the file was imported. Successful updates to the database can be viewed in the system activity log.

There is one file for each on-demand import and only one file for a transactional import. The transaction import file contains information beginning from the time the schedule was started.

```
                              Processed Import/Export List

        Type: Scheduled Action
   Frequency: On-Demand
  Started On: 12/02/2008 12:58 PM
    Filename: testbug2.txt

Record Message
```

For transactional job exports, the report displays the job number and the date and time that the job was processed. Information on when the file was processed is also displayed.

```
                              Processed Import/Export List

        Type: Export Jobs
   Frequency: Transactional
  Started On: 11/21/2005 09:41 AM
    Filename: Abby.DAT

Date        Time       Job #      Job Status      Start Date    Start Time   End Date      End Time

11/23/2005 09:56 AM   Transactional Export Started Successfully
11/23/2005 09:56 AM   Transactional Export Ended
11/23/2005 09:59 AM   Transactional Export Started Successfully
11/23/2005 09:59 AM   Transactional Export Ended
11/23/2005 10:02 AM   Transactional Export Started Successfully
11/23/2005 10:02 AM   Transactional Export Ended
11/23/2005 10:05 AM   369         A              11/23/2005    10:00 AM     11/23/2005    02:00 PM
11/23/2005 10:05 AM   377         O              11/23/2005    10:30 AM     11/23/2005    03:40 PM
```

Substitute Availability

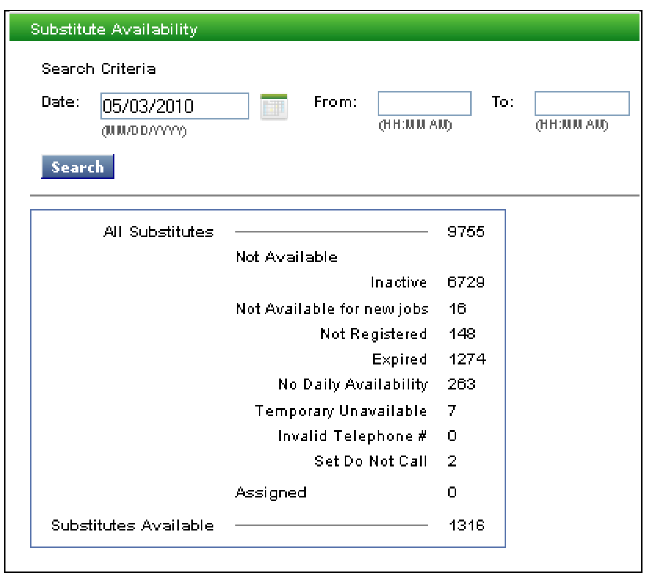
The Substitute Availability feature provides counts for the number of available substitutes in your database for assignments. The data is available for the current day without having to first perform a search. This data is useful when there are several jobs still open in the late morning. The substitute counts can be used to determine whether there are sufficient substitutes to fill open jobs, whether additional substitutes need to be recruited and if other problems exist with substitute availability.

Using the Substitute Availability Screen

The statistics on substitute availability are valid only at the moment the information is displayed on the screen. To display statistics for a date in the future or for a specific time, enter the desired date and time, and click *Search* to re-display the list.

The total number of substitutes is displayed at the top of the screen. The available pool of substitutes is divided into: substitutes who are not available for various reasons, substitutes that are already assigned to jobs, and substitutes who have been disqualified from jobs for the current day. The substitutes in these categories represent those who cannot be called for jobs. The disqualify criteria is set up on the Parameters – Substitute tab. The total count for substitutes that can be called is displayed at the bottom of the screen. Not all available substitutes will be called by the system as their location and classification setup determine if they can be called for assignments.

You cannot access the specifics on which substitutes the system determines will be called from this screen. In order to obtain a list, access Profile Inquiry/Reports, select the Substitute Tab, choose Status – Active, Registered – Yes, Available for New Jobs = Yes, Available on = Today's date.



System Activity Log

The system activity log tracks and monitors all levels of system activity from telephone line problems and errors encountered by the call processor software to database updates. A log record is created for each update performed in the database. Information on system activities is presented as either an informational message, detailing the type of change made to the database, or as an error message, that details the error condition. Refer to Appendix A of this manual for descriptions of PRI messages that may appear in the system activity log.

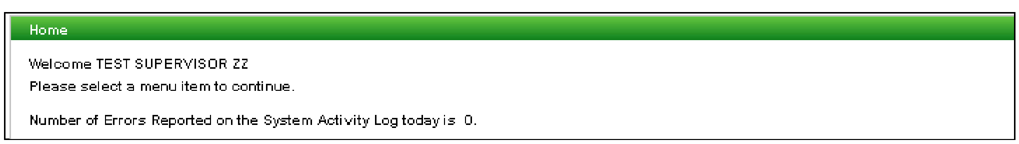
By monitoring the activity log, you can trouble-shoot system problems. A count of errors that have occurred "*today"* is displayed on the Operator's home page. The operator should review their home page on a daily basis and the activity log file for errors and take appropriate action. For example, if an error indicates that an invalid telephone number was dialed, the operator would need to contact the substitute in order to correct the telephone number. If the error indicates that a telephone line is not making calls, even though the telephone numbers are valid, then Client Services should be contacted to troubleshoot the problems.

Informational messages on the activity log can be used to find all of the activity for a specific job, employee, or substitute. The log displays the date, time, and person responsible for the activity.

Several options are available to perform searches on the activity log. You can enter any combination of the search options to display specific log data.

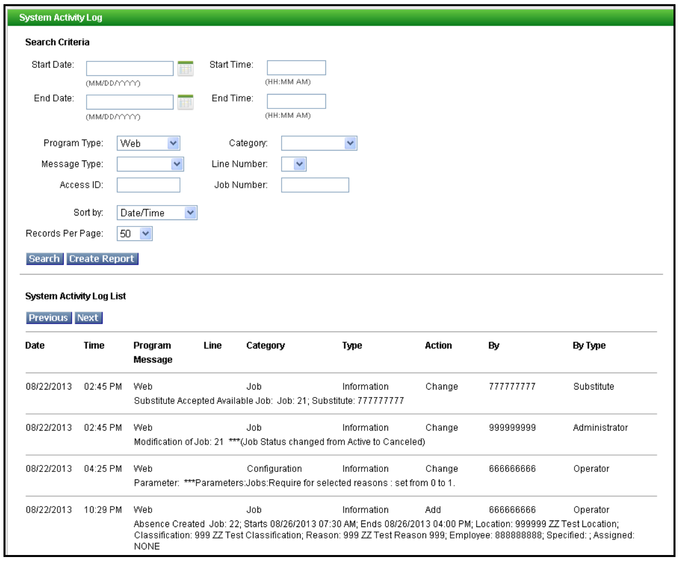
The parameter, "*# of days to keep System Log"* on the Parameters - Configuration tab defines the length of time that information can be retained on the system activity log. The maximum length of time is 30 days. The parameter "*Maximum # of Error recorded in the System Log*" on the Parameters – Configuration tab defines the number of errors that the system log will retain before no more errors are logged. This works in conjunction with the *# of days to keep System Log* parameter.

The number of system log errors is displayed on the system operator's home page. The system log should be checked daily to ensure that the system is running optimally.



Using the System Activity Log Screen

This screen allows you to display log data and create system activity log reports. You can display all log data or only specific data. To restrict the activity log search to specific criteria, enter any combination of search criteria and then click *Search.* The search results displayed on the System Activity Log list will only include the log data that meets the search criteria you entered. To display all log data, click *Search* without entering any search criteria. To view log data for the current day only, enter the date in the *Start Date* field and click *Search* without entering any other search criteria.

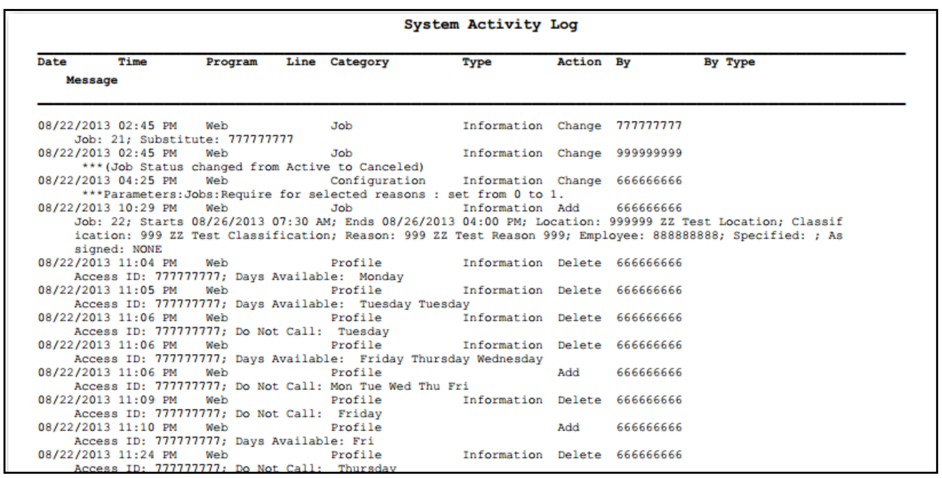


Field Name	**Description**
Program Type	Select a program type to indicate the type of log data you want to view. Program types include Import, Scheduler, IVR, and Web. If no program is specified, activity on all programs is displayed. Choosing a program type allows you to narrow down the type of error messages you will see. For example, if you want to check on web log data, choose this option from the pull-down menu to eliminate extraneous data.
Category	Select a category to indicate the category of log data you want to view. The categories include changes to system menus, job creation, job modification, employee profile, substitute profile, and job calling. If no category is specified, activity on all categories is displayed. Choosing a category narrows the type of log data you will see.

Field Name	**Description**
Message Type	Indicate whether you want the log to display informational messages or error messages associated with the program type, category, or telephone line. If no type is specified, both types of messages will display. The error messages should be checked daily to ensure the system is running properly.
Line Number	Select a specific line number to view log data for a specified telephone line only. If no line number is selected, all line messages will be shown. This is especially helpful when you think you may have an issue with a specific line. You may query on that line number to view the activity.
Start/End Date	Enter a start date and/or end date to view log data for only specific dates within the seven days viewable from the activity log. Dates are entered by using the calendar, or by manually entering the date in the specified format. The past log data only extends back as far as the number entered in the *# of days to keep System Log* field on the Parameters – Configuration screen.
Start/End Time	Enter a start time and/or end time to further narrow your search. Times are entered in **HH:MM AM** or **PM** format. This field is useful to limit your search to a specific range of times that an event occurred.
Access ID	To search for information on a specific employee or substitute, enter the Access ID number.
Job Number	To search for information on a specific job, enter the number assigned to the job when the job was created.
Sort by	Select a sort order for the display of the log data from the drop-down menu. The options are Date/Time, Program Type, Category, or Substitute ID.

Printing the System Activity Log

Click *Create Report* to print a report of the log file. If you click *Create Report* without search criteria being entered, the report will contain all records in the log file. To specify the data to be included in the report, click *Create Report* after your search criteria has been entered. The report is sorted in the order selected for your search. The report automatically displays in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report. A sample report is shown below.



```
                              System Activity Log
Date       Time        Program    Line  Category         Type         Action  By          By Type
    Message

08/22/2013 02:45 PM    Web              Job              Information  Change  777777777
     Job: 21; Substitute: 777777777
08/22/2013 02:45 PM    Web              Job              Information  Change  999999999
      ***(Job Status changed from Active to Canceled)
08/22/2013 04:25 PM    Web              Configuration    Information  Change  666666666
      ***Parameters:Jobs:Require for selected reasons : set from 0 to 1.
08/22/2013 10:29 PM    Web              Job              Information  Add     666666666
     Job: 22; Starts 08/26/2013 07:30 AM; Ends 08/26/2013 04:00 PM; Location: 999999 ZZ Test Location; Classif
     ication: 999 ZZ Test Classification; Reason: 999 ZZ Test Reason 999; Employee: 888888888; Specified: ; As
     signed: NONE
08/22/2013 11:04 PM    Web              Profile          Information  Delete  666666666
     Access ID: 777777777; Days Available:  Monday
08/22/2013 11:05 PM    Web              Profile          Information  Delete  666666666
     Access ID: 777777777; Days Available:  Tuesday Tuesday
08/22/2013 11:06 PM    Web              Profile          Information  Delete  666666666
     Access ID: 777777777; Do Not Call:  Tuesday
08/22/2013 11:06 PM    Web              Profile          Information  Delete  666666666
     Access ID: 777777777; Days Available:  Friday Thursday Wednesday
08/22/2013 11:06 PM    Web              Profile                       Add     666666666
     Access ID: 777777777; Do Not Call: Mon Tue Wed Thu Fri
08/22/2013 11:09 PM    Web              Profile          Information  Delete  666666666
     Access ID: 777777777; Do Not Call:  Friday
08/22/2013 11:10 PM    Web              Profile                       Add     666666666
     Access ID: 777777777; Days Available: Fri
08/22/2013 11:24 PM    Web              Profile          Information  Delete  666666666
     Access ID: 777777777; Do Not Call:  Thursday
```

Tools

This feature enables you to make changes to large amounts of substitute data with one action.
The options on the Tools menu are:

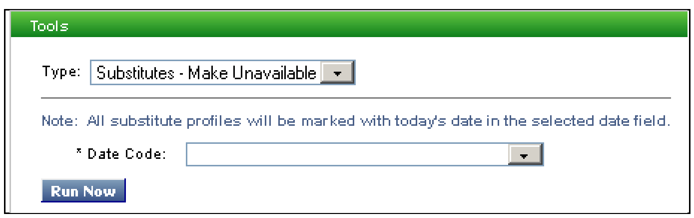
- Substitutes- Make Unavailable
- Substitutes-Set Work Units
- Encrypt Pins and Passwords

Substitutes- Make Unavailable

This feature allows you to “expire” all substitutes by selecting a date that is used to expire. This action, typically performed at the end of each school year, prevents substitutes from accepting any future jobs until each individual profile has been updated. When all substitutes are made unavailable at the end of the school year, each substitute has to submit confirmation that they want to work during the upcoming year. At that time, their profile is updated.

Note: *Exercise caution when performing a mass expiration because it is irreversible without data manipulation by Client Services. If you have any questions about the effects of running this process, please contact Client Services for assistance.*

When this option is selected from the *Type* pull-down menu, the following screen is displayed.

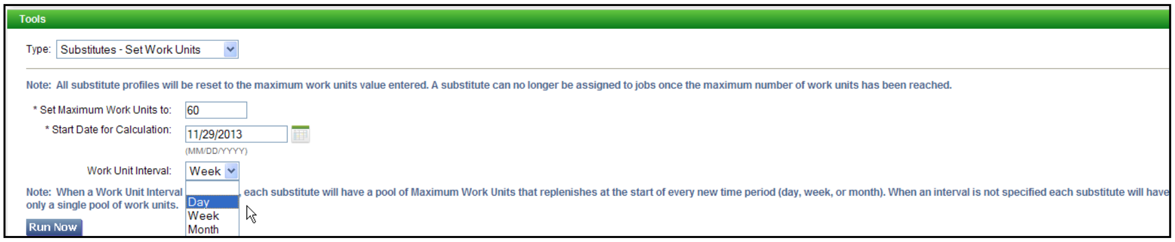


The Date Code pull-down menu lists the Date types that can be expired on substitute profiles. The dates listed are the dates that were defined on the Dates screen and marked as “*Used to Expire – Yes*.” Select the desired expiration date and click *Run Now*. When processing is complete, the system returns a confirmation message that shows the total number of substitute profiles that have been updated.

On the Dates tab of substitute profiles, the “*Expire?*” column will contain a Yes and the “*Date*” column will contain the date this option was run.

Substitutes-Set Work Units

If the "*Restrict substitutes to maximum work units"* parameter is enabled on the Parameters - Substitute tab, you can reset the maximum work units and calculation start date for all substitutes. This process is typically run each year, before the start of the school year. When this option is selected from the *Type* pull-down menu, the following screen is displayed.



In the *Set Maximum Work Units to* field, enter the units to which the maximum work units should be set. All substitute profiles will be set to the value entered in this field.

In the *Start Date for Calculation* field, select the date for the system to start the calculation. The date can also be entered using the date format displayed below the field.

In the *Work Unit Interval* field, specify a time period (day, week, or month) to have the pool of maximum work units replenished for each substitute. A start date must be entered. The work units are replenished at the start of the specified time period. If an interval is not specified, each substitute will have only a single pool of work units.

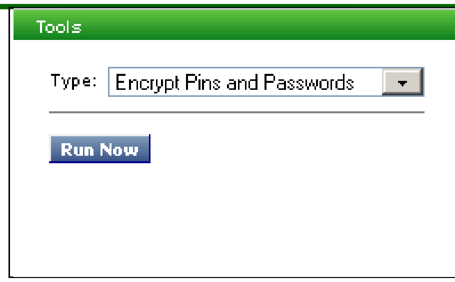
When new substitutes are added after this process is run, each substitute can be allocated the appropriate work units on the *Optional Information* screen.

Once this information is entered, click *Run Now* to reset all substitute profiles in your database.
When processing is complete, the system displays a confirmation message.

Note: *Work units are defined for individual classifications on the New Classifications screen. You must also have the "Restrict Substitutes to Maximum Work Units" parameter enabled on the Parameters – Substitutes tab in order for the system to utilize the work unit feature.*

Encrypt PINS and Passwords

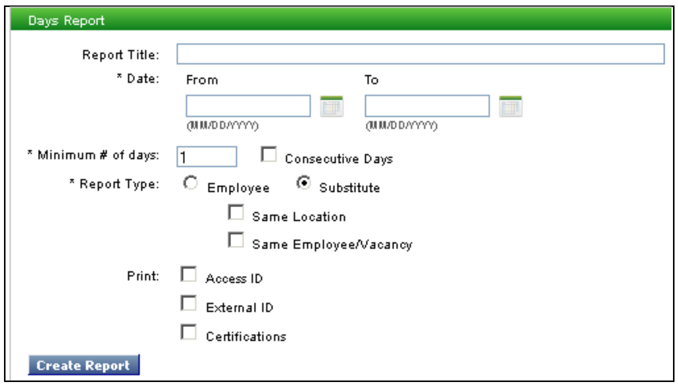
The Encrypt PINS and Passwords tool enables system operators to encrypt all PINS and passwords in their system after an upgrade to Version 2.0. This action is performed to ensure database security. Encrypting PINS and passwords makes them unidentifiable in the case of a security breach. It is recommended that system operators consult with their IT Department and/or with eSchool Solutions' IT Department before running this database tool to prevent any system operations problems.


Tools
Type: Encrypt Pins and Passwords
Run Now

Days Worked

This feature allows you to create a *Days Worked* report for an employee or substitute. The report is based on job records during the specified time period. After entering the parameters for the report, click *Create Report*.

Note*: Access ID and External ID are visible for Administrators if the "View Employee ID" and "View Substitute ID" parameters are enabled on the Parameters – Administrator tab.*



This report can be used to monitor the number of days a substitute works due to a contractual or union agreement. A substitute can be blocked from working more days than allowed by either:

- Un-checking the "*available for new jobs*" box on their profile, or
- On the *Unavailable Dates* screen, choosing the "Substitute Unavailability Date" option from the pull-down menu and entering a date range that extends from now through the end of the school year.

Only one of the above actions needs to be performed to prevent the substitute from being requested, shopping for jobs and from receiving calls. If the substitute views their profile online and you use the "Substitute Unavailability Date" option, they will be unable to see that data. You may also want to add a comment in their profile on the Optional Information screen concerning the reason you made the substitute unavailable for new jobs.

Accessing Jobs Details using Profile Inquiry/Reports

The Days Worked report allows you to view how many days and work units a substitute has worked during a specified time. To view the substitute's specific job assignments for a given time period, follow these steps:

- Access Profile Inquiry/Reports
- Enter the substitute's name, select their **Name** link, chose the Substitute tab, choose the **Assignments** link
- Enter the same date range you entered for the report and click *Search*. The job information displays in the bottom part of the screen. You may view individual jobs by choosing the **Job Number** link.

If you choose employee, the system returns data that shows you how many days the employee has been absent. To view specific absence information on the employee, follow these steps:

- Access Profile Inquiry/Reports
- Enter the employee's name, select their **Name** link, choose the Employee tab, choose the **Absences** link
- Enter the same date range you entered for the report and click *Search*. The job information will appear in the bottom part of the screen. You may view individual jobs by choosing the **Job Number** link.

Field Name	**Description**
Report Title	Enter a title for the report. This title will display at the top of the report. This is not a required field.
Date	Enter the date range for the report. Job records for this date range will be displayed on the report. Use the calendar icon to select the date or enter the date in the specified format.
Minimum # of days	Enter a number for the minimum number of days worked by a substitute, or absences by an employee being considered for the report. Indicate if the minimum number of days should be for consecutive days.
Employee	Select *Employee* to print a report of employee absences. Substitute is the default.
Substitute	Select *Substitute* to print a Days Worked report for a substitute. This is the default. Indicate if the report should include information on jobs worked by the substitute at the same location and/or on jobs worked for the same employee or vacancy. If *same location* is checked: ▪ Data is displayed that reflects both the time period entered and the substitute's assignments that are at the same location. The substitute may have other assignments during this period, but they will not be reflected in this report. ▪ The location will appear in another column on the report. If the substitute has worked at multiple locations, for the days worked criteria, the substitute's name will appear multiple times along with the location name and days worked at that specific location. If *same employee/vacancy* is checked or both boxes are checked: ▪ The substitute's name will appear multiple times along with the location name and/or employee name/vacancy information.
Print	Select the profile information to appear on the report for the employee or substitute. Certifications only appear on Substitute reports. The ID information is pulled from the profile type (employee or substitute) you choose for the report.

A Days Worked report looks similar to the following report.

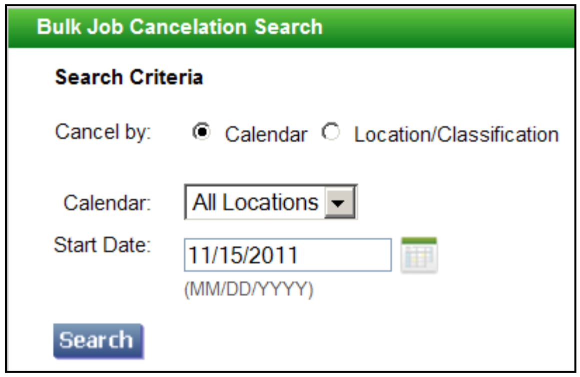
Days Report

Period Date from 05/03/2010 - 05/05/2010
Minimum # Days Worked = 1

Name	Certified	Access ID	External ID	Days Count	Work Units		
	Certification	Code	Description			Date	Comments
WELBORN, ALICE	Yes	10785		2	4		
		No Certifications Found					
WARD, AMIE	Yes	11348		1	6		
		No Certifications Found					
BEASLEY, AMY	No	11352		1	6		
		No Certifications Found					
ADKINS, ANGELINA	Yes	12097		1	6		
		No Certifications Found					
COTTON, ANNA	Yes	12488		2	4		
		No Certifications Found					
VOLLMER, ARACELI	Yes	15264		1	6		
		No Certifications Found					

Bulk Job Cancelation

This feature gives system operators the ability to cancel *all* jobs for a specific day or range of days by Calendar or by Location/Classification. Operators can also choose to notify substitutes of the job cancelation by either telephone or by email. The bulk job cancelation method is selected from the Bulk Job Cancelation Search page.



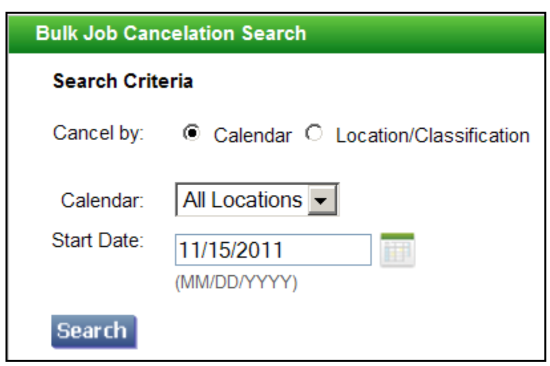
When the 'Calendar' method is used, the bulk job cancelation process **prevents** other jobs from being created for that date/calendar.

When the 'Location/Classification' method is used with the selected date, the bulk job cancelation process **does not prevent** other jobs from being created for that "Location/Classification" and selected date.

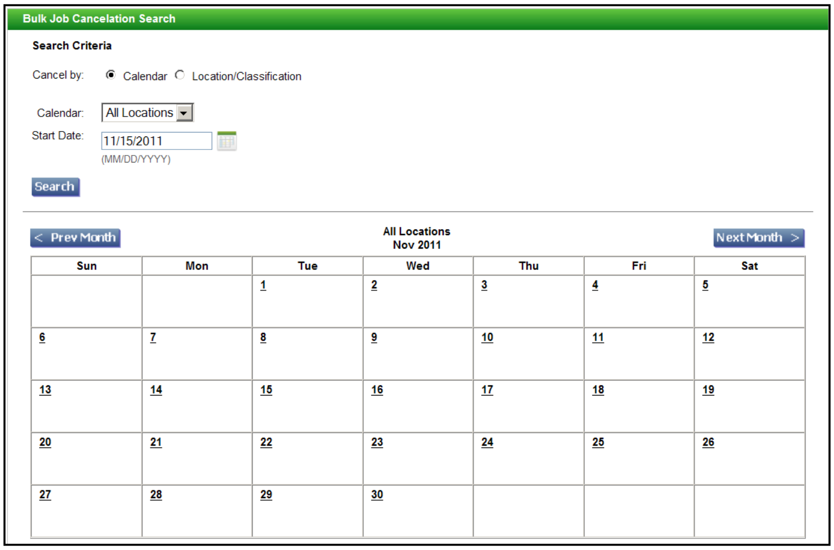
Cancel by Calendar

The *Cancel by: Calendar* function is used to cancel jobs for the current day and/or for days in the future by configuring the date(s) on the Calendar as a Holiday.

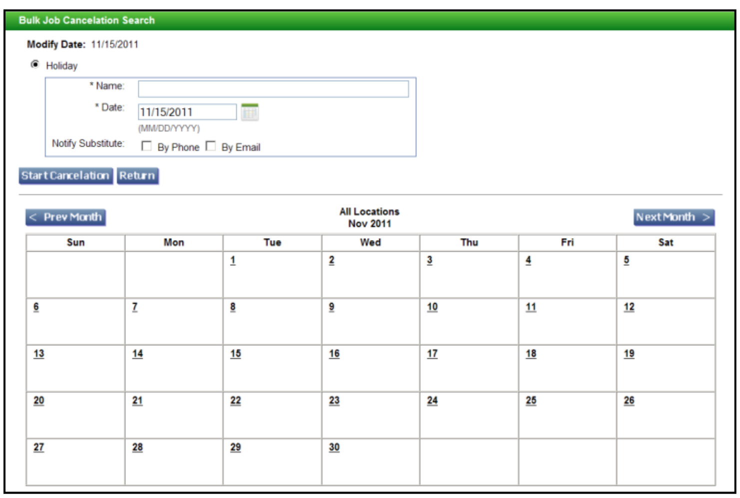
On the Bulk Job Cancelation Search screen, the Calendar dropdown displays all active calendars for the district. The Start Date field defaults to the current day. After selecting the Calendar, choose the start date for the cancelation if the date is different from today's date. Click the Search button.



The Bulk Job Cancelation Search screen is redisplayed with the requested Calendar. Click on the link of the calendar day for which the jobs are to be canceled.

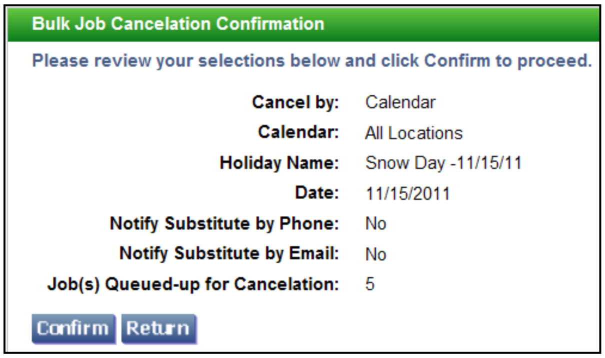


The Modify Date screen for the selected day is displayed.

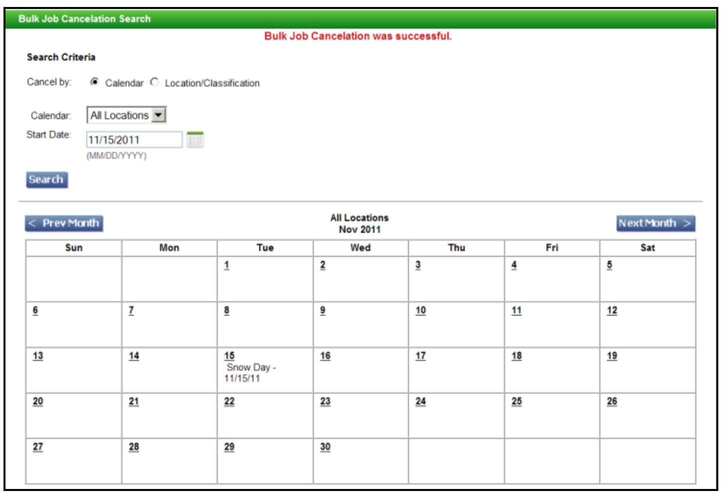


The Name and Date fields are required. A unique name **must** be entered in the Name field. This is especially important when using the “All Locations” calendar. In the Notify Substitute field, select either “By Phone” or “By Email” as the method for notifying substitutes of the job cancelation. .To start the bulk cancelation process, click the Start Cancelation button.

The system displays the Bulk Job Cancelation Confirmation screen. The details of the cancelation are displayed. The Holiday Name field shows the name assigned to the canceled day. Confirm the job cancelation action by clicking the Confirm button.



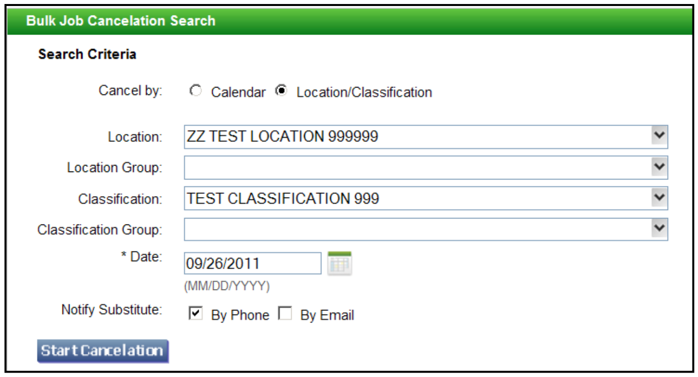
The system displays a message that the bulk job cancellation action was successful. The canceled day is added to the Calendar.



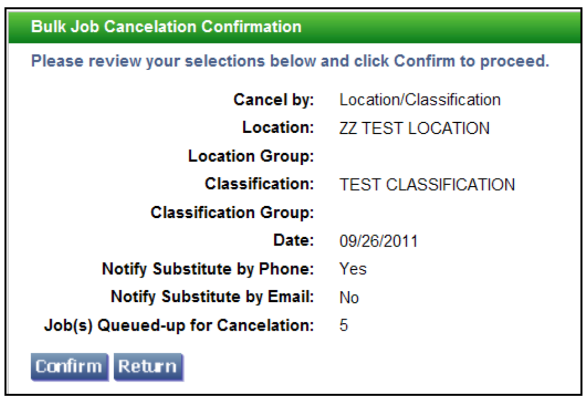
Cancel by Location/Classification

The *Cancel by: Location/Classification* function enables operators to cancel all jobs for a Location/Location Group/and Classification/Classification Group for the current day or for a future date.

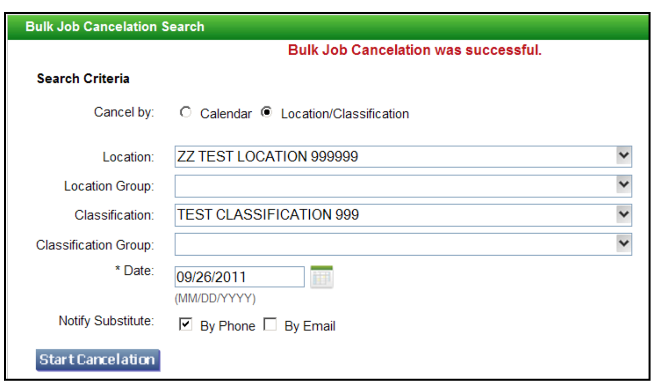
Location/Classification information is selected from the drop-down menus on the Bulk Job Cancelation Search page. The Date field defaults to the current day. To choose a different date, click on the Calendar icon. Substitutes can be notified by phone or by email. To start the bulk cancelation process, click the Start Cancelation button.



The Bulk Job Cancelation Confirmation screen is displayed. The details of the bulk cancelation are displayed including a total for the number of the jobs scheduled for cancelation. Clicking the Confirm button completes the bulk job cancelation process.



The system displays a message that the bulk job cancellation was successful.



To setup a bulk job cancelation request for another location/classification, select the location/classification, date and substitute notification method and then click the Start Cancelation button.

System Configuration Menu

The System Configuration menu enables you to configure the parameters and processes for the system features that determine the usage of your system.

Feature	Description
Budget Code	Budget codes can be used to indicate the budget to which substitute hours and/or employee absences should be charged and to control the use of selected absence/vacancy reasons.
Calendar	Calendars are used to indicate which days are workdays, holidays, or No Substitute Required Days (NSR). The “All Locations” calendar is used as the basis for all calendars in your database.
Certifications	Certification codes are set up to record certification information on substitutes. Substitutes can be searched by certifications.
Classification Profiles	A classification represents a specific subject, work assignment or position. Classifications are used to match substitutes skilled in a particular area with absences or vacancies in the same area.
Classification Groups	Classification groups are comprised of logical grouping of individual classifications or other classification groups. They can be used to setup reason menus and for job inquiry and reporting.
Dates	Dates store date information on the substitute, such as hire date and certification dates. The date code setup defines whether the date is used to expire the substitute.
Location Profiles	Locations are the individual sites where employees are assigned. A location’s profile includes its address, location group assignments, SAU limits, and start, end, and callout times.
Location Groups	Location groups are comprised of logical groupings of individual locations or other location groups. They are used to maintain the substitute’s profile work locations and priority lists, to set up reason menus and for inquiry and reporting.
Reasons	Absence/Vacancy reasons are defined for job creation and decline/cancellation reasons are defined for job declines and job cancellations.
Reason Menu	Reason menus are lists of absence/vacancy reasons that can be defined for a specific location or classification group.
Search Rules	Search rules determine which lists apply to jobs for a given classification, and the order in which those lists are used to call substitutes.
Custom Fields	Provides 10 "spare" fields on the Profile record that can be used to store or use additional district-specific information. Operators can control Administrator access to custom fields.

Budget Codes

Overview

A budget code is a code associated with a job that can be included in a job report, or in data transfers from the system to an accounting or payroll system. Budget codes are included in job detail information to indicate the budget to which substitute hours and/or employee absences should be charged. Budget codes can also be used to prevent reporting an absence or vacancy for a particular reason without prior authorization.

Manually entered budget codes are input into the system for jobs using reasons that have the "*Collect a budget code"* option enabled on the Absence/Vacancy Reasons screen, or for any jobs if the parameter "*Administrators can always enter budget code*" is enabled.

A budget code can be assigned to a job in several ways:

- Manually entered in response to a SmartFind*Express* voice prompt via the IVR (telephone) after entering a reason that has *"collect a budget code"* enabled
- Automatically assigned from the Default Budget Code list
- Included from the employee profile.

If the *Verify budget code* option is also selected for the reason, the budget code entered must match a budget code on the Verification Budget Codes list. Otherwise, any code could be entered.

Administrators and supervisors can modify budget codes when modifying the job.

The term "Budget Code" can be modified on the Parameters – General tab to reflect your location's terminology, for example, Payroll Code instead of Budget Code.

Note: *Budget codes can be alpha or numeric. If using alpha budget codes, the "Collect a budget code" option should not be used. Alpha budget codes cannot be entered on the telephone.*

Default Budget Codes

When a job is being created and the reason for the absence has the "*Collect a budget code"* option disabled, the system will attach a default budget code for the chosen reason.

Default budget codes are also used to enter budget codes in the job record without manual intervention from the party entering the job. The budget code is automatically added to the job information when the job is created. The default budget code is pulled from the employee profile or from the default budget code list. Default budget codes are attached to reasons and to location/location groups.

If a budget code exists in the employee profile and on the default budget code list, the system uses a specific order to decide which budget code to apply to a job record. The order is:

1. Use the budget code in the employee profile.
2. Use the default budget code for the match of the location and reason in the job record.
3. Use the default budget code for the match of the location group and reason in the job record. If default budget codes are used for location groups, a location should not belong to multiple groups. The budget code that is assigned will be one of the matching location groups, thus giving an unpredictable result.

Note: *If the reason does not require a budget code and there is no default budget code in any of authorized locations, the budget code field is left blank for that job.*

Verification Budget Codes

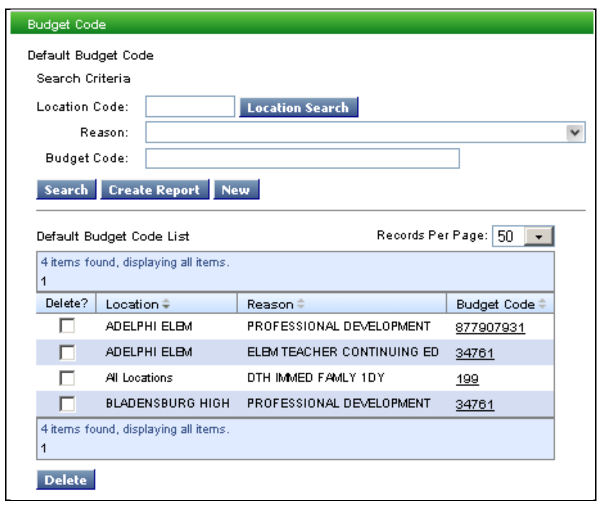
Verification budget codes can be set up to provide a method for controlling the use of selected reasons and can be used to verify manually entered budget codes.

Verification budget codes are cross-referenced when a budget code is entered during the absence or vacancy entry process. The system checks the list of possible budget codes for accuracy of the budget code entered when the "*Verify budget code"* option is checked for the reason. If the budget code is not validated, the person entering the job will be asked to re-enter the code. The job cannot be created until a valid budget code is entered.

Note: *The "Verify Budget Code" and "Collect a budget code" options can be enabled separately. If you do not collect, but do verify, a changed budget code in job modification can be verified.*

Using the Default Budget Code Screen

This screen lets you display, add, modify and delete default budget codes and create budget code reports. The Budget Codes list can be sorted by Location, Reason and Budget Code by clicking on the up/down arrow in that column.



To delete default budget codes from the list, click the deletion box next to the budget code you want to delete and then click the *Delete* button at the bottom of the screen. When a default budget code is deleted from the list, it is *not* deleted from any job records.

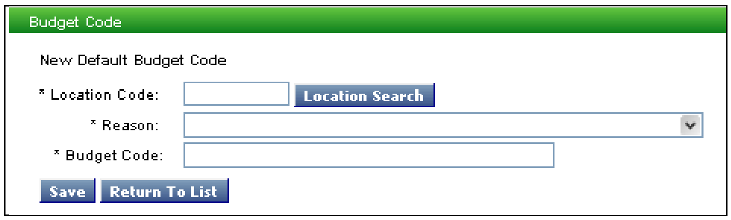
Displaying Default Budget Codes

To display all default budget codes in your database, click *Search*. The Default Budget Code list is displayed. To narrow your search to specific default budget codes, enter any combination of the search criteria and click *Search*. The Default Budget Code list will display the default budget codes that match the search criteria. The Budget Codes list can be sorted by Location, Reason and Budget Code by clicking on the up/down arrow in that column.

Adding Default Budget Codes

Each location or group can have its own set of default budget codes. Each entity may have as few or as many of these codes as there are reasons on the "Absence/Vacancy Reasons" screen. One default budget code can be entered per reason, per location or group. Default budget codes can be imported.

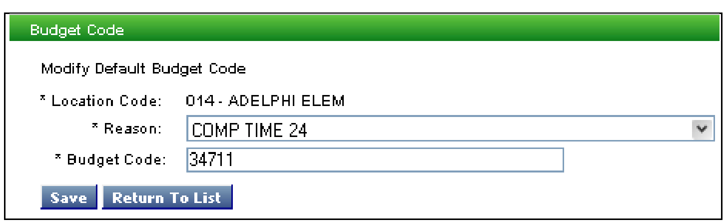
Click *New* to display the New Default Budget Codes screen. Entries are required in all three fields to *save* the new default budget code. Click *Save*.



Field Name	**Description**
Location/Group	The pull-down menu displays all authorized locations and location groups.
Reason	The pull-down menu displays all reasons codes.
Budget Code	Enter a unique identifier for the budget code. The maximum field length is 45 and can contain alpha/numeric characters if the "*Budget codes contain alpha/numeric characters*" parameter is enabled on the Parameters – General tab. **Note**: *The same budget code may be used in multiple default budget code records, regardless of the location or reason with which the code is being associated*.

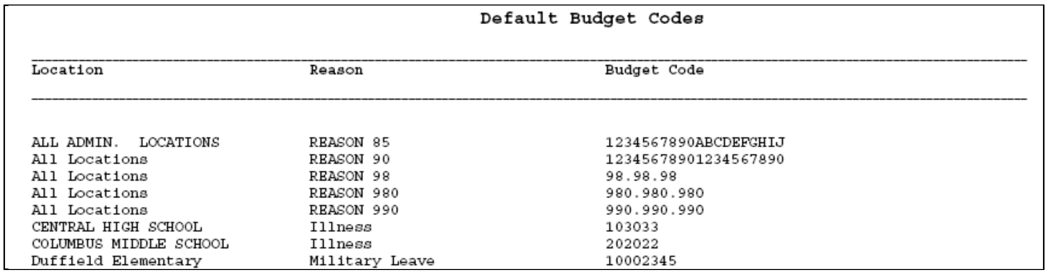
Modifying Default Budget Codes

To modify default budget codes, click *Search* to display the Default Budget Codes list, if not already displayed. Click the link of the budget code to be modified. The Modify Default Budget Code screen is displayed. Update the desired fields and click *Save*. If an error is encountered, a message will display and the information can be corrected.



Printing Default Budget Code Reports

You can create a report of all of the budget codes in your database, or only select budget codes. To print the report, click *Create Report*. The report automatically displays in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report. A sample report is shown below.

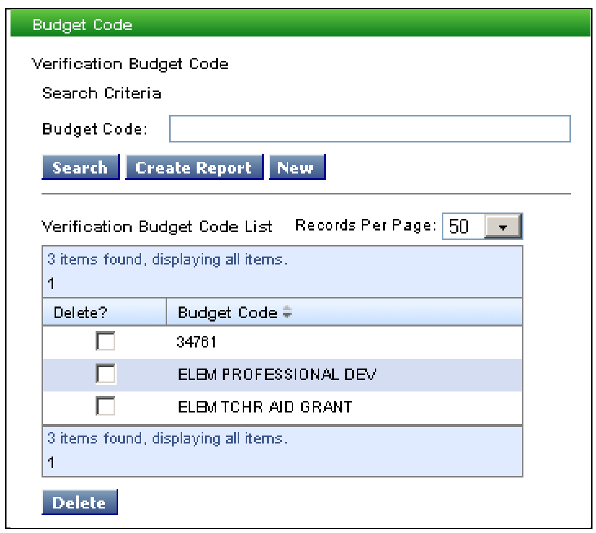


Default Budget Codes

Location	Reason	Budget Code
ALL ADMIN. LOCATIONS	REASON 85	1234567890ABCDEFGHIJ
All Locations	REASON 90	12345678901234567890
All Locations	REASON 98	98.98.98
All Locations	REASON 980	980.980.980
All Locations	REASON 990	990.990.990
CENTRAL HIGH SCHOOL	Illness	103033
COLUMBUS MIDDLE SCHOOL	Illness	202022
Duffield Elementary	Military Leave	10002345

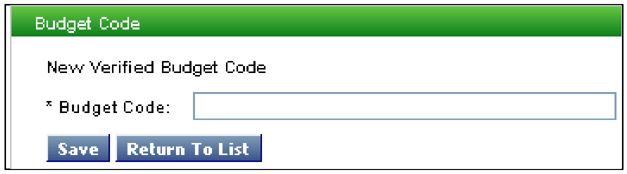
Using the Verification Budget Code Screen

This screen allows you to view, add and delete budget codes and create verification budget code reports. To display the list of approved budget codes, click *Search*. The Verification Budget Code list is displayed. To display specific codes, enter the budget code identifier and then click *Search* to display the list.



Adding/Deleting Verification Budget Codes

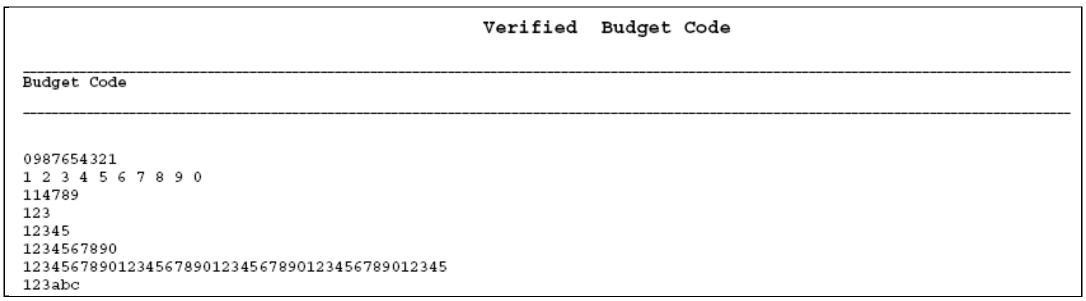
Click *New* to display the New Verified Budget Codes screen. Add an identifier for the budget code. If the option "*Budget codes contain alpha/numeric characters*" is enabled on the Parameters – General tab, the format can contain alpha and numeric characters or just numeric. Click *Save* to add this budget code to the database.



To delete verification budget codes from the list, check the deletion box next to the budget code you want to delete and click the *Delete* button at the bottom of the screen. When a verification budget code is deleted from the list, it is *not* deleted from any job records.

Printing Verification Budget Code Reports

You can create a report that shows all of the verification budget code records in your database, or only select records. To print the report, click *Create Report*. The report automatically displays in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report. A sample report is shown below.



Verified Budget Code

Budget Code
0987654321
1 2 3 4 5 6 7 8 9 0
114789
123
12345
1234567890
12345678901234567890123456789012345678901234 5
123abc

Calendar

Overview

The Calendar feature displays all calendars that are active in your database. Calendars indicate whether each date is a workday, holiday, or No Substitute Required (NSR) day. An NSR day is used for events, such as staff development or teacher workdays, when an absence is reported, but the option for a substitute is not available.

If no information is displayed in the date box, that day is a workday; otherwise, the status is displayed in the date box.

All employees must have a calendar assigned when importing or manually entering data.
Calendars also determine whether the system uses regular or holiday callout times for a given day of the week.

Calendars work in conjunction with the workdays denoted on each employee's profile, so there is no need to mark Saturday and Sunday as holidays on the calendars. The system will not allow an absence to be reported on a non-workday as indicated in the employee's profile or on a calendar.

The "All Locations" calendar is used as the basis for all calendars. When you enter a holiday on this calendar, the system also adds that holiday to all existing calendars. When you add a new calendar, it will include the "All Locations" holidays. The "All Locations" calendar should contain only the holidays that all employees using the system honor. A holiday cannot be changed to a workday on subsequent calendars if indicated as a holiday on this calendar.

When working with calendars, the following terms apply:

Workday	Date on a calendar on which an employee is required to work.
Holiday	Date on a calendar for which an employee is not required to work, even though regularly scheduled to work on that day of the week. Holidays are used when employees are not required to report absences.
Before Status	When the *Use Holiday Rule List* checkbox is enabled for a holiday, the system calculates the days prior to the holiday start date using the parameters entered for *Holiday Rule Lists* on the Parameters – Jobs tab and labels those days "Before Status." The "before status" excludes weekends when the days are calculated. This applies only to the "All Locations" calendar and all search rules (affecting all employee types).
After Status	When the *Use Holiday Rule List* checkbox is enabled for a holiday, the system calculates the days after the holiday end date using the parameters entered for *Holiday Rule Lists* on the Parameters – Jobs tab and labels those days "After Status." The 'after status" excludes weekends when the days are calculated. This applies only to the "All Locations" calendar, and all search rules (affecting all employee types).
NSR (No Substitute Required)	Day(s) where employees report absences, but no substitute is required.

Why Use Calendars?

Entering holidays on the calendar prevents employees, administrators, and supervisors from entering absences for holidays. Absences cannot start or end on a day that is a holiday. For example, if an absence spans a holiday, a substitute is found for all days of the absence that fall on workdays. However, the absence must start and end on a workday in order to tell the substitute when the job starts and ends.

Calendars also impact the following features during job creation:

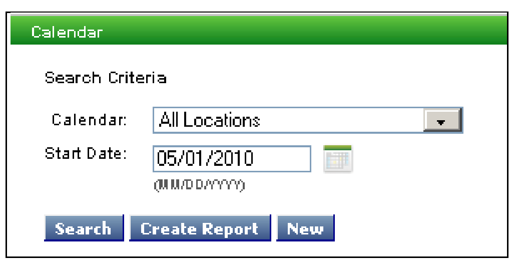
Substitute Allocation Units (SAUs)	When determining if a job will exceed the number of work units that can have a substitute at a particular location per week, month, or year, the system does not include days marked as holidays during the job.
Maximum Work Units	When determining if a job will exceed the number of work units a substitute can work, the system does not include days marked as holidays, as it deducts from the maximum number of work units allotted to that substitute.
Long-term jobs	Long-term jobs, as defined by the number of work units entered on the Classifications screen, are excluded from some tallies and limitations that apply to other jobs. The system does not count days marked as holidays when determining if a job is a long-term job.
Multiple-day jobs	No job segments are created for days marked as holidays.

The Effect on Callout Times

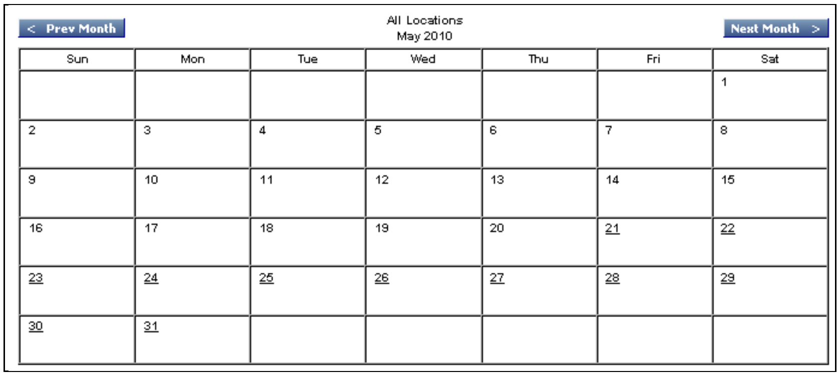
If a date is listed as a workday on the “All Locations” calendar, the system uses the regular weekday, Saturday, or Sunday callout times when calling substitutes for that day. If a date is listed as a holiday, the system uses the holiday callout times, regardless of the day of the week.

Using the Calendar Screen

This screen allows you to display, add, modify, and create Calendar reports.

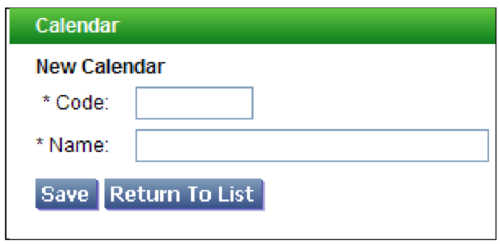


To display a calendar, select the desired calendar from the pull-down list and click *Search*. To display a calendar beginning with a date other than the current date, enter a date in the *Start Date* field.



Adding Calendars

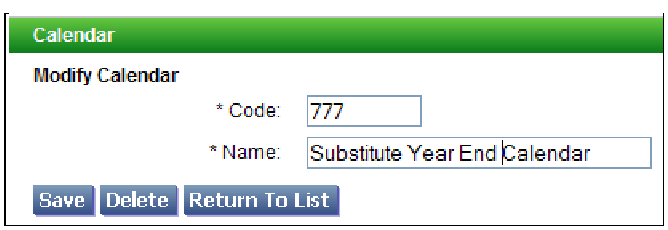
On the Calendar screen, click *New*. The New Calendar screen is displayed. Enter the code and name for the new calendar and click *Save*. Both fields are required.



Field Name	Description
Code	Code to identify the calendar. This code is entered on the telephone when creating a vacancy. Can be alphanumeric.
Name	Descriptive name for the calendar.

Modifying Calendars

To modify a calendar, select the Calendar from the pull-down menu and click *Search*. When the calendar displays, click on the link on the calendar name. The Modify Calendar screen is displayed. Update the desired information and click *Save.*



Modifying Calendar Dates

To modify a calendar day, *s*elect the calendar you want to modify from the Calendar pull-down menu and click *Search*. The requested calendar is displayed. Click on the link of the day you want to modify. The Modify Date screen is displayed. Update the desired fields and click *Save*.

If an error is encountered, a message will display informing you that an update to this calendar date may cause some jobs to be modified or cancelled. You can choose to continue, or cancel the update.

Field Name	Description
No Calendar Entry	The default status for each calendar day. Days on the calendar shown with an underline represent workdays.
No Substitute Required	A day where employees report absences, but no substitute is required. When this option is selected, the "No Sub Required" label displays for this date.
Holiday	Select this option to create a holiday. On the "All Locations" calendar, a holiday name and a date or date range is required. The holiday name must be unique. On the "All Locations" calendar, if the *Holiday Rule Lists* option is enabled on the Parameters – Jobs tab, the *Use Holiday Rule* checkbox is displayed. Check this box if the holiday requires special processing rules for the workdays before and after the holiday. The system calculates the Before Status and After Status days based on defined parameters. Special processing rules that determine which substitutes are called for jobs following the holiday are used. Before and After Status days are calculated around any days designated as NSR days and weekends.

Modifying days for multiple-day jobs

When you add or delete a holiday or NSR day from a calendar when multiple-day jobs exist, the system updates each job with this change. Substitutes are not notified of this change in the job schedule.

Modifying days for single-day jobs

You cannot add or delete a holiday or NSR day if any single day job for the day exists. Jobs will have to be manually cancelled and the substitute notified before a day can be modified.

Note: *Dates in the past cannot be modified at any time.*

Entering weekends on a calendar

If Saturdays and/or Sundays are entered as ***workdays***:

- Saturday or Sunday callout times are used, as appropriate for those days
- Employees whose profiles indicate a work schedule including Saturdays and/or Sundays are able to report absences for those days.

If Saturdays and/or Sundays are entered as ***holidays***:

- Holiday callout times are used for those days

- Employees whose profiles indicate a work schedule including Saturdays and/or Sundays are not able to report absences for those Saturdays and/or Sundays that are marked as holidays.

Printing Calendar Reports

From the Calendar pull-down menu, select the desired calendar and click Search. The calendar is displayed. Click *Create Report* to print a list of all non-workdays on the calendar beginning with the start date. The report automatically displays in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report. A sample report is shown below.

Calendar

Starting: **05/01/2010**
Calendar: **TESTCUSTCAL (En) TEST CUSTODIAN CALENDAR**

Date	Type
07/05/2010	Independence Day 10

Voicing Calendars

You must record a voicing for each new calendar so that callers are able to hear the name of the calendar when reporting a vacancy. To voice a calendar over the telephone, follow these steps:

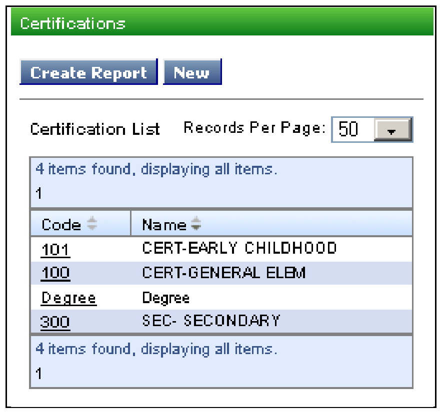
1. Select Telephone Voicing from the menu and locate the voicing ID of the new calendar.
2. Call the system and enter your Access ID followed by the star (*) key, enter your PIN followed by the star (*) key.
3. Press “5” on your telephone keypad to record system voicing.
4. Follow the prompts to record and replay the recording.

Certifications

Certification codes are set up to record certification information on substitutes. Certifications that can be stored are setup by the operator. Certifications are stored for data collection purposes and are not used when assignments are filled. Information on certifications may be printed on substitute reports. Substitutes can be searched by certifications.

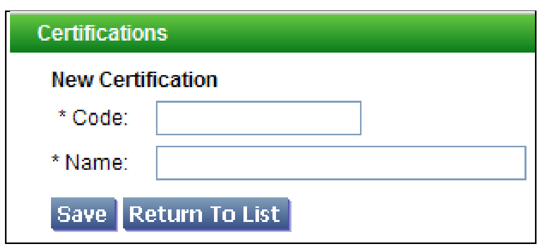
Using the Certifications Screen

Use this screen to add, modify and delete certifications and to print a Certifications report. The Certification List can be sorted by Code or Name by clicking on the up/down arrow in that column.



Adding Certifications

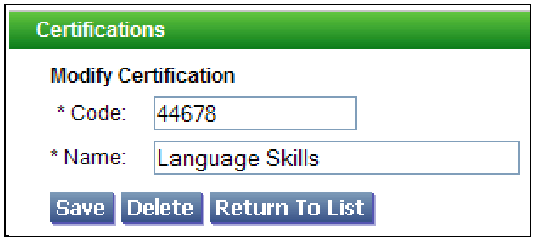
Click *New* to display the New Certification screen. Enter the required information and click *Save*.



Field Name	Description
Code	A unique identifier for the certification. Can be alphanumeric.
Name	Descriptive name for the certification record.

Modifying/Deleting Certifications

To modify a certification record, click on the **Code** link of the certification you want to modify. The Modify a Certification screen displays. Update the desired information and click *Save*. Once the fields are updated, the change is made throughout the system on the substitute profiles.



To delete a certification record, click on the **Code** link for the certification you want to delete. The Modify a Certification screen for the certification record displays. Click *Delete*.

Note: *A certification record cannot be deleted if it exists in substitute profiles. It must be removed from the profile before it can be deleted from the database.*

Printing Certification Reports

Click *Create Report* on the Certifications screen. The Certifications report automatically displays in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report. A sample report is shown below.

Certifications

Code	Name
100	(En) CERT-GENERAL ELEM
101	(En) CERT-EARLY CHILDHOOD
300	(En) SEC- SECONDARY
Degree	(En) Degree

Classification Profiles

Overview

A Classification represents a specific subject, work assignment type, or position. Classifications are used to match substitutes skilled in a particular area with absences or vacancies in that area. They are also used to print reports on select personnel and to create priority lists.

Classifications on Profiles

An employee must have at least one classification recorded in their profile. When the system searches for a substitute for an absence, the employee's classification(s) affect which substitutes are eligible for the job and the order in which substitutes are called. When an employee has multiple classification codes, the employee selects the classification that applies to the absence.

Substitute profiles use classifications to indicate subjects or positions preferred by the substitute. They can also be used to indicate which classifications the substitute is certified to teach. Each substitute may have an unlimited number of classifications recorded on the Classifications screen in their profile.

Work Units

Work units are assigned by classification code. A *work unit* is a unit of time that represents the shortest amount of time for which a substitute can be paid. A work unit can range from one hour to a full day. *Work unit length* is the minutes that represent the shortest amount of time for which a substitute can be paid. For example, in many locations, substitutes are paid for a half-day for any amount of time worked on the same day (even if less than four hours). When creating a new classification, you are required to enter the work unit length.

Minimum Job Duration

Some employees have to be absent a certain number of days before a substitute can be required. The Minimum Job Duration (MJD) feature prevents a substitute from being assigned to the first day of an absence for specific classifications. When the MJD for a classification is set to any number other than zero, the system checks to see if all absences entered for that classification are shorter than the MJD. Absences that are shorter than this limit are marked "No Substitute Required – MJD." Absences that equal or exceed the limit are split into two jobs, each with a different job number. The first job, for the beginning of the absence, is marked "No Substitute Required – MJD," and is one day shorter than the MJD setting. The second job, for all remaining days of the absence, is created as per the user's specifications, unless affected by other system criteria.

Substitutes on a location's Automatic Assignment list will not be assigned to any absences shorter than the MJD limit for the absentee's classification. However, they can be assigned to the portion that is equal to, or exceeds the MJD limit. Also, the MJD feature overrides a request for a specified substitute, or an attempt to prearrange the absence for any portion of an absence that is shorter than the MJD for the absentee's classification.

The MJD feature applies when a job meets the following conditions:

- A substitute is required for the absence
- The *Classification Minimum Job Days* field is checked on the absence reason
- The *Assign a sub after __days* field on the Classifications screen for the employee's primary classification is set to a number greater than "0."
- The absence is not a long-term job, as determined by the *Long term job units* field on the Classifications screen
- The employee's classification uses a search rule
- *Use Minimum Job Duration* is enabled in the search rule

Note: *For the purposes of the MJD feature, a partial-day absence is counted as if it were a full-day absence*.

Daily Work Schedule

The daily work schedule for a Classification is defined by the *Maximum value to report* and the *Unpaid Break* allocations.

Maximum Value to Report

The *maximum value to report* is the maximum reportable minutes in a day that the system will accept for the Classification on a Verified job record in the *substitute time worked field* on the Import record. When a job is being verified, the system compares the *substitute time worked* field to the *maximum value to report* value. If the *substitute time worked* field exceeds this value, the following rules will apply:

- If the verifier/user has Job Override permission, the system will present a message for the user to choose to set the *substitute time worked* to the *maximum value to report*, **or** continue as entered and verify the job with the exceeded value.

- If the verifier/user does not have Job Override permission, the system will present a message that *substitute time worked* cannot exceed maximum value to report. In this case, the user must modify the *substitute time worked* field to be equal to, or less than the *maximum value to report*, before the job can be verified.

For example, if the *substitute time worked* is ten hours and the maximum value to report is eight hours, for the job to be verified, the system will present the options outlined above based on the verifier's Job Override permission.

Unpaid Break

Unpaid Break can be optionally configured for Classifications. Unpaid Break is the amount of unpaid break time (i.e., unpaid lunch breaks) allowable for a Classification. The unpaid break is deducted after a specified amount of time has been worked on the job. The system automatically calculates whether the *job duration* or *substitute time worked* fields should have the break time deducted if a value is entered on the Classification record for when to apply the unpaid break.

Unpaid Break applies to Classifications, not to Classification Groups.

Applies After Working

The number of minutes that should be worked before the unpaid break can apply. The system automatically calculates whether the job duration or substitute time worked field should have the break time deducted if this value is populated.

Search Types

A *search rule* is assigned to a classification and determines the order in which priority and other lists are used. The search type determines where calling starts on each *level* within a given list. Each time the system uses a given level; the search type determines which substitute should be selected first from that level.

When the system selects the substitute who will be the "starting point" within that level for a given job, it considers and attempts to call each substitute in turn. If a substitute on a given level does not accept the job, it considers each substitute on that level, one after another, in system assigned number order. It then rotates around the list back to the starting point before moving on to the next level, sublist, or list.

When all substitutes on a given *level* have been considered, the system moves on to the next-higher-numbered level. When no higher-numbered levels exist on a given *sublist*, it moves on to the next-higher-numbered sublist. When no higher-numbered sublists exist on a given list, the system goes on to the next list as determined by the search rule.

There are four search types identified by the numbers 0, 1, 2, and 3. Each search type is designed to meet a different need.

Note: *It is recommended that you select one search type and use it for all classifications. This aids in the process of performing a system analysis.*

Search Type 0:

With this search type, the starting point within each level is randomly selected. A number is randomly chosen among all substitutes that are being considered. This search type does not guarantee that all substitutes will have an equal chance at being selected as the “starting point” each time a given level is used. This search type is the default search type offered for each new classification.

The following example illustrates how the system might use a list to call on five different jobs, using search type 0. The starting point for one job has no bearing on the starting point of other jobs.

History Priority List for Johnson Middle

Substitute Name	First Job	Second Job	Third Job	Fourth Job	Fifth Job
Level 1					
Jackson, Sam	3rd Call	5th Call	1st Call	3rd Call	4th Call
Smith, Sally	4th Call	1st Call	2nd Call	4th Call	
Adams, Noel	5th Call	2nd Call	3rd Call	5th Call	1st Call
Dean, Sharon	1st Call	3rd Call		1st Call	2nd Call
Atkins, Dian	2nd Call	4th Call		2nd Call	3rd Call
Level 2					
Sims, Greg	9th Call			8th Call	
Delray, Gail	6th Call	6th Call			
James, Mona	7th Call	7th Call		6th Call	
Hubert, Missy	8th Call			7th Call	

Search Type 1:

This search type directs the system to the substitute who was called first for that classification and then selects the next-higher-numbered substitute as the starting point for the current job, unless the highest-numbered substitute was the starting point for the last job. In that case, it selects the lowest-numbered substitute. The benefit of this search type is that substitutes on a given level "take turns" being selected first. If there are five substitutes on a level, each substitute is selected *first* once in every five jobs using that level.

Note: *Search type 1 assures the most equitable distribution of calls to substitutes over a period of time.*

The following table illustrates how the system selects five substitutes for five different jobs from a given level when using search type 1.

History Priority List for Johnson Middle School

Substitute Name	First Job	Second Job	Third Job	Fourth Job	Fifth Job
Level 1					
Jackson, Sam	1st Call	5th Call	4th Call	3rd Call	2nd Call
Smith, Sally	2nd Call	1st Call	5th Call	4th Call	3rd Call
Adams, Noel	3rd Call	2nd Call	1st Call	5th Call	4th Call
Dean, Sharon	4th Call	3rd Call	2nd Call	1st Call	5th Call
Atkins, Dian	5th Call	4th Call	3rd Call	2nd Call	1st Call

Search Type 2:

This search type directs the system to determine which substitute was the last on that level to be called. Once this determination is made, it selects the next-higher-numbered substitute on that level as the starting point. If the last substitute selected has the highest ID number, it selects the substitute with the lowest ID number on that level. The benefit of this search type is that the next substitute "in line" is always called. The drawback is that the system can skip over available substitutes when calling from a given list for more than one job at a time.

The following example illustrates how substitutes could be selected when the system uses the level for a single job with a classification using search type 2. *The asterisk (*) indicates that the substitute accepted the job.*

History Priority List for Johnson Middle School

Substitute Name	First Job	Second Job	Third Job	Fourth Job	Fifth Job
Level 1					
Jackson, Sam	1st Call	2nd Call	4th Call		2nd Call*
Smith, Sally	2nd Call	3rd Call*	5th Call*		
Adams, Noel	3rd Call		1st Call	1st Call	
Dean, Sharon	4th Call*		2nd Call	2nd Call*	
Atkins, Dian		1st Call	3rd Call		1st Call

This search type should be used with caution. When the system calls from the same level on more than one job with a classification using search type 2 at the same time, substitutes can be skipped for one job because they were considered for a different job. When reviewing the calling information on a given job, you will not be able to determine that this has occurred. It will seem as if the system has skipped over that substitute for no apparent reason.

This following example shows how substitutes could be selected when the system uses the level for two jobs at the same time. In this example, Dian Atkins was the last substitute selected the last time the system used this level.

History Priority List for Johnson Middle School

Substitute Name	Order Selected	Job #	Result	Result Record on Job #
Level 1				
Jackson, Sam	1st	1	Decline	1
Smith, Sally	2nd	2	Not Available	2
Adams, Noel	3rd	2	No Answer	2
Dean, Sharon	4th	1	No Answer	1
Atkins, Dian	5th	2	Accept	2

The "Calling Information" for these Jobs would show these call results:

Job #1		Job #2	
Substitute	**Result**	**Substitute**	**Result**
Jackson, Sam	Decline	Steele, Sally	Not Available
Dean, Sharon	No Answer	Adams, Noel	No Answer
		Artemis, Dian	Accept

When the system tries to select the next substitute from this level for job 1, it finds itself starting over with the substitute it selected first for that job. Instead of selecting that substitute again for the same job, it goes on to the next level.

Search Type 3:

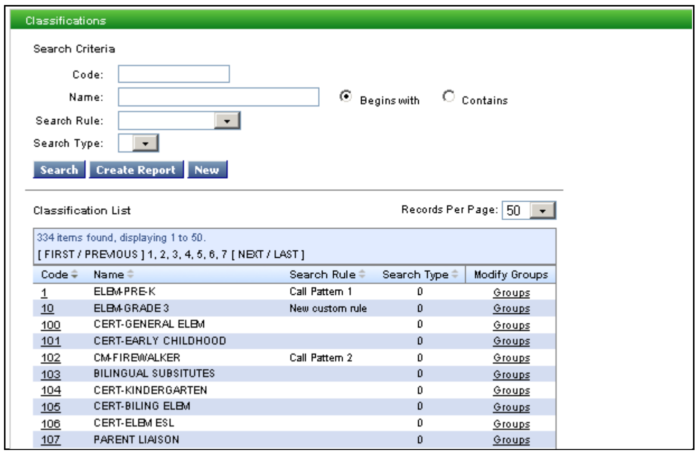
This search type directs the system to use only one marker within a sublist, rather than one per level. It determines who was the last substitute called, or considered within the sublist, regardless of level. Once this determination is made, it selects the next-higher-numbered substitute on that level as the starting point. If there is more than one substitute per level within the sublist, it starts with the lowest numbered ID first and then moves to the next-higher-numbered substitute within the level before moving to the next level in the sublist.

Note: *This search type was designed for locations that have to call substitutes by seniority. If the intent is for substitutes to be called in a specific order (never selecting between equally qualified substitutes), there should be only one substitute per level within the sublist of the priority lists*.

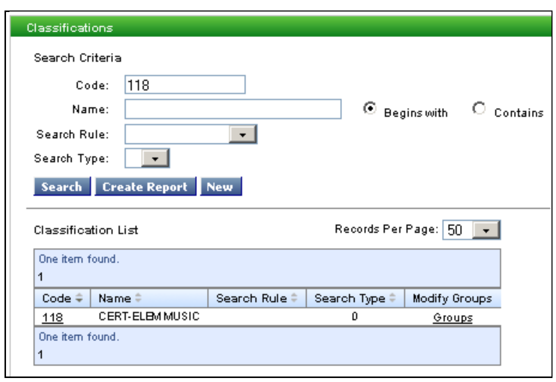
The benefit of this search type is that it allows the system to call substitutes in a specific sequential order.

Using the Classifications Screen

Use this screen to search for Classifications, add new classifications, and delete or modify existing Classifications. Classification Groups can also be modified, created or deleted from this screen. To create a Classifications report, click the Create Report button.



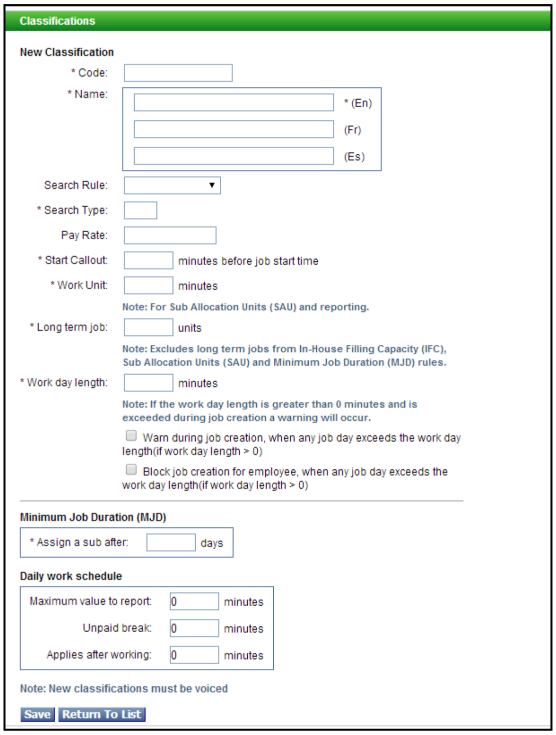
To search for a specific classification, enter any combination of the search criteria. The Name field contains a “Begins with” and “Contains” clause to narrow down the search results. The Classification List will display items that matched the specified criteria.



The Classification List will display items that match the specified criteria. The list can be sorted by Code, Name, Search Rule, Search Type or Modify Groups by clicking on the up/down arrow in that column or on the column label.

Adding Classifications

Click *New* to display the New Classification screen. To add a new classification, fill in the information on the new classification and then click Save.

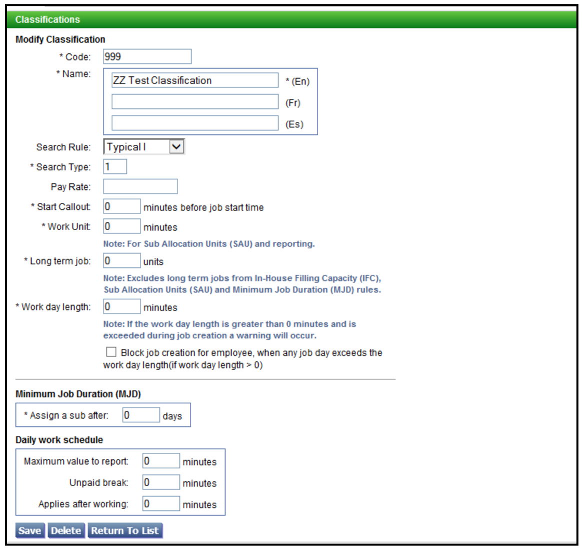


Field Name	Description
Code	Unique identifier for the classification. May be alphanumeric.
Name	Description for the classification. It should reflect the name of the position or subject. The name does not have to match the name recorded for review over the telephone.
Search Rule	Select a search rule from the pull-down list. The default is blank. If no search rule is entered, there will be no callout on the job and substitutes cannot be requested or prearranged.

Field Name	Description
Search Type	The numbers 0, 1, 2, and 3 identify the four search types. Search Type 0 is the default search type offered for each new classification. It determines which substitutes will be called first, when there are multiple substitutes on the same sublist and level.
Pay Rate	The pay grade a substitute will receive for working a job with a specific classification. Enter the pay rate associated with this classification. Pay rate will be assigned to the job and will display on job reports and export formats.
Start Callout_ minutes before Job Start Time	Number of minutes prior to the start of the job for calling to begin. Valid values are 0-1440 minutes (24 hours). Enter a value of zero (0) to show this field as inactive. This feature is useful for classifications that typically require being at work prior to or at the start of morning callout.
Work Unit	The number of minutes that represent the shortest unit of time for which a substitute can be paid, from one hour to a full day.
Long-Term Job	A job that is as long as, or longer than the number of work units for the job.
Work Day Length	The work day length of the job in minutes. <u>'Warn during job creation' option</u> Enable this checkbox to have a warning message displayed during job creation when the work day length for the absence exceeds the work day length of the job classification. The absence can still be created. <u>'Block job creation for employee' option:</u> Enable this checkbox to set a block on job creation for employees when an absence exceeds the work day length of the job classification. When the employee attempts to create the absence, an error message is displayed and the absence cannot be created.
Minimum Job Duration (MJD)	• Assign a Sub after __days = the minimum number of days before a job with this Classification can be assigned to a substitute. The values are 0-99 days. If left blank, this feature is not active. • Workday length = the workday length is the number of minutes that represent the workday.
Daily Work Schedule	The following values are used to configure the Unpaid Break for the Classification: • *Maximum value to report* is the maximum reportable minutes in a day that the system will accept for this Classification on a Verified job record in the substitute time worked field. • *Unpaid Break* is the amount of unpaid break time (in minutes) allowable for this Classification. • *Applies after working* is the number of minutes that should be worked before the unpaid break can apply. The system automatically calculates whether the job duration or substitute time worked field should have the break time deducted if this value is populated.

Modifying/Deleting Classifications

On the Classifications list, click on the code of the classification you want to modify. The Modify Classification screen is displayed. Update the desired field(s) and click *Save* to update the classification.



To delete a classification, click on the code of the classification you want to delete. When the Modify Classification screen is displayed, click *Delete* to remove the Classification record. A system message displays that asks you to confirm the Delete action. Click either Yes or No.

Note: *A classification cannot be deleted if it is assigned in an employee or substitute profile, or a job. The following error message will display, "Classification cannot be deleted because it exists in employee profiles and/or jobs."*

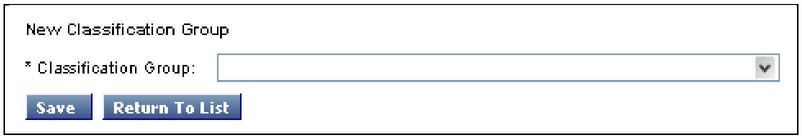
Modifying Classification Groups

Classification groups are a logical grouping of individual classifications or other classification groups. Classifications can be assigned to multiple classification groups. The **Groups** link on the Classification screen allows you to modify classification groups for a classification.

Click the **Groups** link to display the Classification Groups screen. The classification groups associated with the classification are displayed.

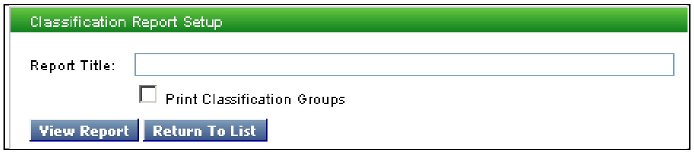
To delete a classification group from the Classification Group list, click the box next to the classification group you want to delete and click *Delete*.

To add the classification to another group, click *New* to display the New Classification Group screen. The pull-down menu lists the defined classification groups. Make your selection and then click *Save*.

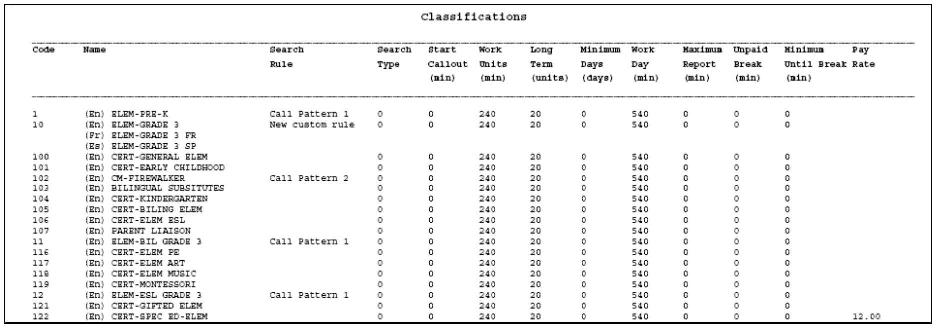


Printing Classifications Reports

Click *Create Report* to display the Classification Report Setup screen. Enter a title for the report and indicate if you want to include Classification Groups on the report, and then click View Report.



The report automatically displays in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report. A sample report is shown below.


Classifications

Code	Name	Search Rule	Search Type	Start Callout (min)	Work Units (min)	Long Term (units)	Minimum Days (days)	Work Day (min)	Maximum Report (min)	Unpaid Break (min)	Minimum Until Break (min)	Pay Rate
1	(En) ELEM-PRE-K	Call Pattern 1	0	0	240	20	0	540	0	0	0	
10	(En) ELEM-GRADE 3 (Fr) ELEM-GRADE 3 FR (Es) ELEM-GRADE 3 SP	New custom rule	0	0	240	20	0	540	0	0	0	
100	(En) CERT-GENERAL ELEM		0	0	240	20	0	540	0	0	0	
101	(En) CERT-EARLY CHILDHOOD		0	0	240	20	0	540	0	0	0	
102	(En) CM-FIREWALKER	Call Pattern 2	0	0	240	20	0	540	0	0	0	
103	(En) BILINGUAL SUBSITUTES		0	0	240	20	0	540	0	0	0	
104	(En) CERT-KINDERGARTEN		0	0	240	20	0	540	0	0	0	
105	(En) CERT-BILING ELEM		0	0	240	20	0	540	0	0	0	
106	(En) CERT-ELEM ESL		0	0	240	20	0	540	0	0	0	
107	(En) PARENT LIAISON		0	0	240	20	0	540	0	0	0	
11	(En) ELEM-BIL GRADE 3	Call Pattern 1	0	0	240	20	0	540	0	0	0	
116	(En) CERT-ELEM PE		0	0	240	20	0	540	0	0	0	
117	(En) CERT-ELEM ART		0	0	240	20	0	540	0	0	0	
118	(En) CERT-ELEM MUSIC		0	0	240	20	0	540	0	0	0	
119	(En) CERT-MONTESSORI		0	0	240	20	0	540	0	0	0	
12	(En) ELEM-ESL GRADE 3	Call Pattern 1	0	0	240	20	0	540	0	0	0	
121	(En) CERT-GIFTED ELEM		0	0	240	20	0	540	0	0	0	
122	(En) CERT-SPEC ED-ELEM		0	0	240	20	0	540	0	0	0	12.00

Voicing Classifications

You must record a voicing for each new classification so that callers are able to hear the name of the classification. To voice a location over the telephone, follow these steps:

1. Select Telephone Voicing from the menu and locate the voicing ID of the new classification.
2. Call the system and enter your Access ID followed by the star (*) key, enter your PIN followed by the star (*) key.
3. Press “5” on your telephone keypad to record system voicing.
4. Follow the prompts to record and replay the recording.

Classification Groups

Overview

Classification Groups is a logical grouping of individual classifications or other existing classification groups. Classifications groups may or may not represent a hierarchy of classifications as illustrated in the following example.

Classification Group	Classification/Classification Group
All Teachers	Elementary Teachers Secondary Teachers
Elementary Teachers	Grade 1 Grade 2
Bus Drivers	Driver Level 1 Driver Level 2

Classifications can be assigned to multiple classification groups. Refer to the previous section for detailed information on Classifications.

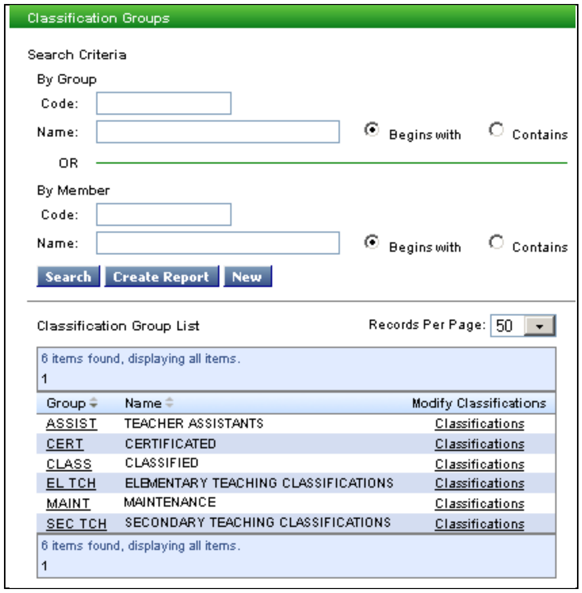
Classification groups are used in the following ways:

- To set up reason menus. Reason menus determine if different types of personnel should be offered different reason codes when reporting absences or vacancies
- For job inquiries and to produce reports on employees, substitutes, and jobs
- Classification groups can be entered on the Classification tab of the Substitute profile to ease data entry.

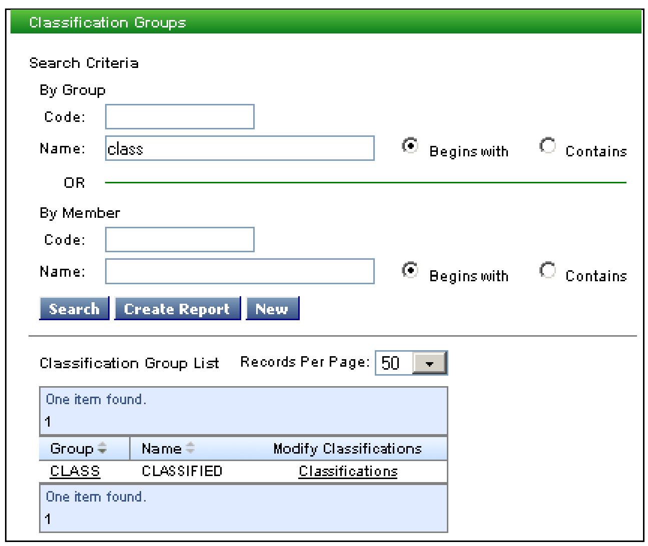
To determine the classification groups that will be required for your system, you will need to understand the absence reasons that different employee types can use and your reporting requirements.

Using the Classification Groups Screen

Use this screen to search for Classification Groups and to add, modify or delete classification groups. Classifications can also be modified, created or deleted from this screen. To create a Classification Groups report, click the Create Report button.



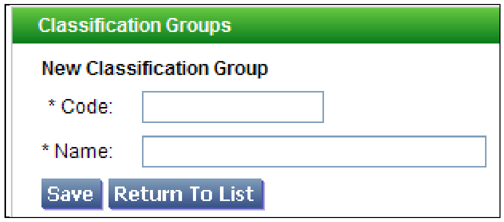
To search for a specific classification group, enter any combination of the search criteria. The Name fields contain a “Begins with” and “Contains” clause to narrow down the search results.



The Classification Group List will display items that match the specified criteria. The list can be sorted by Group or Name by clicking on the up/down arrow in that column.

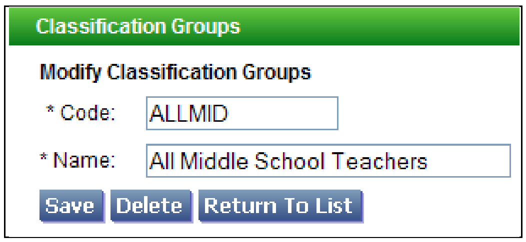
Adding Classification Groups

Click *New* to display the New Classification Group screen. Enter a unique identifier in the Code field and a descriptive name for the classification group in the Name field.



Modifying a Classification Group

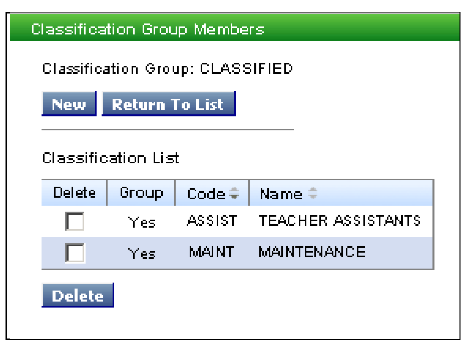
Click the **Group** link of the classification group you want to modify. The Modify Classification Groups screen is displayed. Update the desired fields and click *Save*.



To delete the classification group, click the Delete button. If there are Reason Menus that use the classification group, a system message will display informing you that the classification group data is being used. You can choose to continue, or to cancel the deletion. If you continue the deletion, all data will be removed from existing profiles.

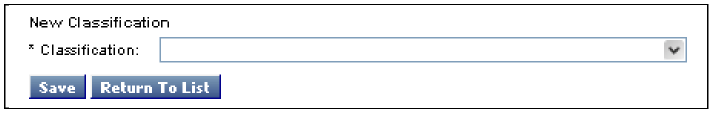
Modifying Classification Groups

You can add or delete classifications or classification groups from a classification group. On the Classification List, click the **Classifications** link for the classification group you want to modify. The Modify Classification Group screen is displayed. All Classifications that belong to that classification group are displayed. Classification groups are identified from individual classifications by the display of Yes or No under the *Group* heading.



To delete a classification or classification group, click the desired deletion box and then click *Delete*.

To add a classification or classification group, click *New* to display the New Classification screen. The pull-down menu contains all authorized classifications and classification groups. Make your selection and click *Save* to add this classification or classification group.



Printing Classification Group Reports

Click *Create Report* on the Classification Groups screen to print a listing of classification groups. The report is sorted by group name, classification and then associated group names. The report automatically displays in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report. A sample report is shown below.

Classification Groups

Code	Name	Classifications	Code	Is Group?
3001	Elementary			
2001	History teachers			
1420	Para Prof	Teachers Eng AP	1009	No
1598	Science teachers			
3333	Special Education	Para	103	No
		Para	103	No

Dates

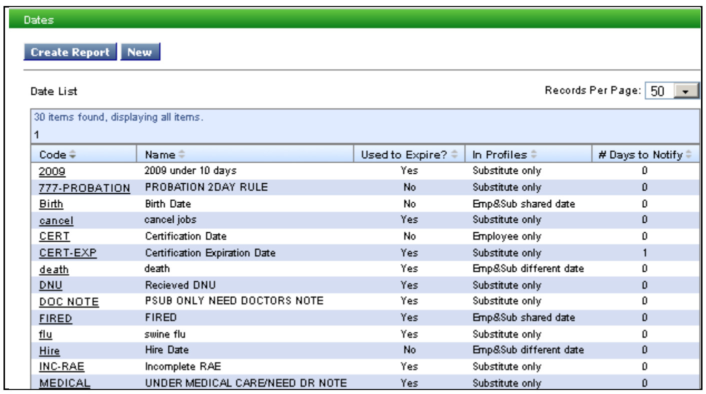
Overview

The Dates feature is used to create all of the dates that will be stored in the employee and substitute profiles. Dates can be used to indicate that a *substitute* is expired and cannot be assigned to any job or that an *employee* is expired and cannot create absences. Employees and substitutes can be notified on their home page or via the telephone.

Substitute and employee profiles can store an unlimited number of dates. To enter a date in a profile, click the **Dates** link, choose *New*, enter a name and date, and click *Save*. The inquiry menus allow you to select date ranges or the Date name to identify profiles that have the desired data.

Using the Dates Screen

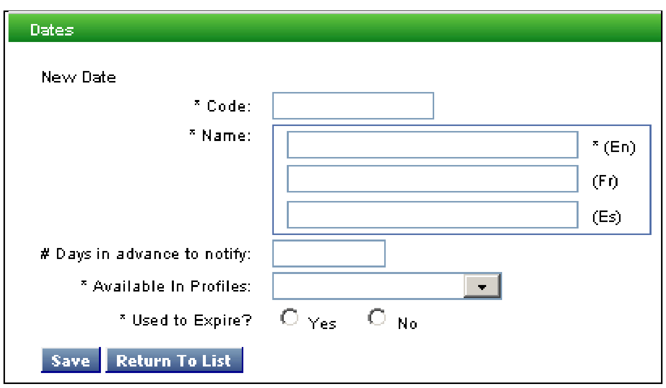
Use this screen to add, modify and delete Dates and to create Date reports. The Date List can be sorted by the column headings by clicking on the up/down arrow in that column.



Code	Name	Used to Expire?	In Profiles	# Days to Notify
2009	2009 under 10 days	Yes	Substitute only	0
777-PROBATION	PROBATION 2DAY RULE	No	Substitute only	0
Birth	Birth Date	No	Emp&Sub shared date	0
cancel	cancel jobs	Yes	Substitute only	0
CERT	Certification Date	No	Employee only	0
CERT-EXP	Certification Expiration Date	Yes	Substitute only	1
death	death	Yes	Emp&Sub different date	0
DNU	Recieved DNU	Yes	Substitute only	0
DOC NOTE	PSUB ONLY NEED DOCTORS NOTE	Yes	Substitute only	0
FIRED	FIRED	Yes	Emp&Sub shared date	0
flu	swine flu	Yes	Substitute only	0
Hire	Hire Date	No	Emp&Sub different date	0
INC-RAE	Incomplete RAE	Yes	Substitute only	0
MEDICAL	UNDER MEDICAL CARE/NEED DR NOTE	Yes	Substitute only	0

Adding Dates

On the Dates screen, click *New* to display the New Date screen. After entering the information for the Date, click *Save* to add the Date record.

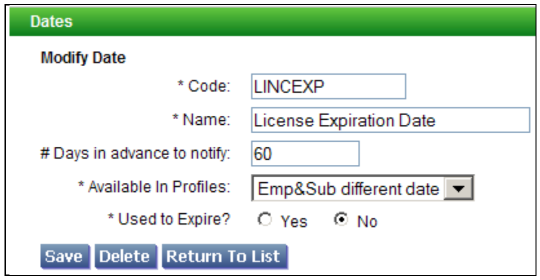


Field Name	Description
Code	Enter a unique identifier for the date. The code can be alphanumeric.
Name	The description for the date. The name must be unique. It will display on reports and screens when this date is referenced. It can be alphanumeric.
# Days in advance to notify	Number of days in advance of the date for the employee or substitute to be notified. For each date, the notification will appear on the home page when the employee or substitute logs into the system. The notification information is also provided over the telephone. The maximum number of days that can be entered is between 1-365. This feature is not active if the field is left blank, or contains a value of zero. **Note:** *This option is not dependent on the setting of the "Used to Expire" indicator.*
Available in Profiles	From the pull-down menu, select one of the four options: *Employee only* – date will be visible/updateable on the Employee profile (Dates tab) *Substitute only* - date will be visible/updateable on the Substitute profile (Dates tab) *Emp&Sub shared date* – the shared date will be visible/updateable on the Substitute profile (Dates tab) and on the Employee profile (Dates tab). For example, birth date. A profile can have only one birth date that is visible/updateable on both the employee and substitute Date tabs. There is only one Birth date stored. *Emp&Sub different date* – different dates, each one with the same date name/code, can be visible/updateable on the Substitute profile (Dates tab) and Employee profile (Dates tab) When this option is assigned to a date, it allows the same name/code to be used on a Substitute and/or Employee profile. For example, Start date. You can have a different start date for the employee and for the substitute. Each Date tab will display the date that belongs to the employee or substitute. Two start dates are stored, one for each profile.
Used to Expire?	Indicates if the date is used to expire the substitute. If "Yes," is selected, the substitute cannot be assigned to jobs once this date is reached. The default is "No."

Modifying/Deleting Dates

On the Dates screen, click on the Date code you want to modify. The Modify Date screen is displayed. Update the desired fields and click *Save*. If an error is encountered, the system will display an error message. Make any corrections and click *Save*.

If the Code or Name fields are modified, all pull-downs and screens containing that data will be updated.



On the Dates screen, click on the Date code you want to delete. The Modify Date screen is displayed. Click *Delete*. If there are substitute or employee profiles associated with the date record, a message will display informing you that the date is being used. You can choose to continue, or to cancel the deletion. If you continue the deletion, all data will be removed from existing profiles.

Printing Dates Reports

On the Dates screen, click *Create Report* to print a list of the Date records. The report is automatically displayed in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report. A sample report is shown below.

Dates

Code	Name	Used to Expire?	In Profiles	# Days to notify
Birth	Birth Date	No	Emp&Sub different date	0
Certification	Certification Expiration Date	Yes	Emp&Sub different date	30
Other	Other Expiration Date	Yes	Emp&Sub different date	30
Start	Start Date	No	Emp&Sub different date	0
Tuberculosis	Tuberculosis Expiration Date	Yes	Emp&Sub different date	30
Vacancy	Vacancy Expiration	Yes	Emp&Sub shared date	10

Location Profiles

Overview

Locations are the individual sites where employees are assigned. Locations are used to match substitutes who are willing to work at a particular location with employees or vacancies at that location.

Locations can be assigned to multiple location groups. Location groups are used to assign substitutes to a group of locations and to report on a group of locations.

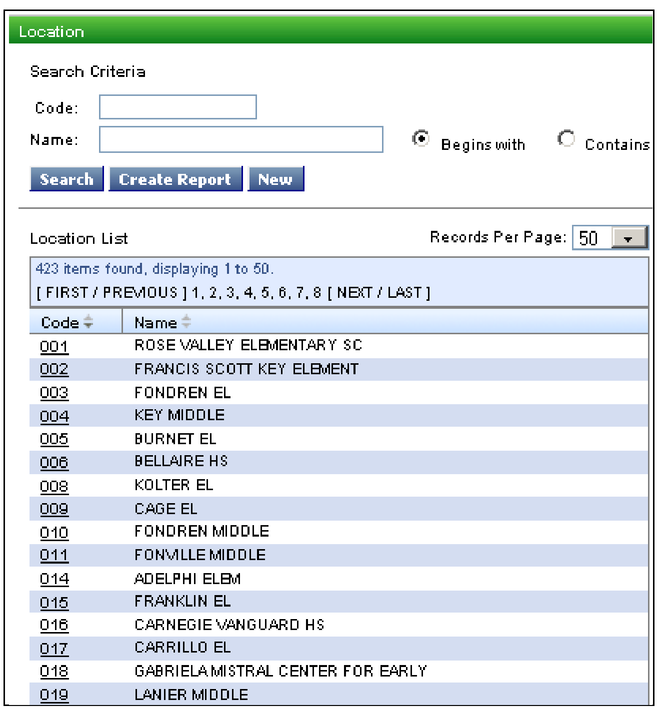
Location descriptions are voiced by the system administrator and played on the telephone to identify the location.

An employee must have at least one location recorded in their profile, and may have any number of locations. When an employee profile has multiple locations, the employee must enter separate absences for each location.

A substitute has locations listed in their profile in either their location preferences or on substitute priority lists. Priority lists are maintained by the administrator or operator and determine the order by which substitutes are offered jobs.

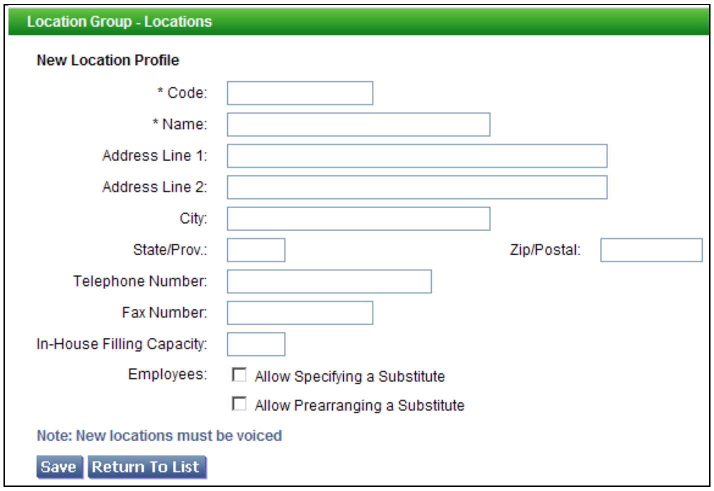
Using the Location Profile Screen

Use this search screen to find a specific location profile or display all location profiles in the database. To display a specific location profile, enter the location's code and/or enter the location name. Use the "Begins with" or "Contains" clause to narrow down the search results. Click *Search*. To display all locations, leave the fields blank and click *Search*. The Location list is displayed.



Adding Location Profiles

On the Location Profile screen, click *New*. The New Location Profile screen is displayed. Enter the information on the new profile and then click *Save.*


Location Group - Locations

New Location Profile

* Code:

* Name:

Address Line 1:

Address Line 2:

City:

State/Prov.: Zip/Postal:

Telephone Number:

Fax Number:

In-House Filling Capacity:

Employees: Allow Specifying a Substitute

Allow Prearranging a Substitute

Note: New locations must be voiced

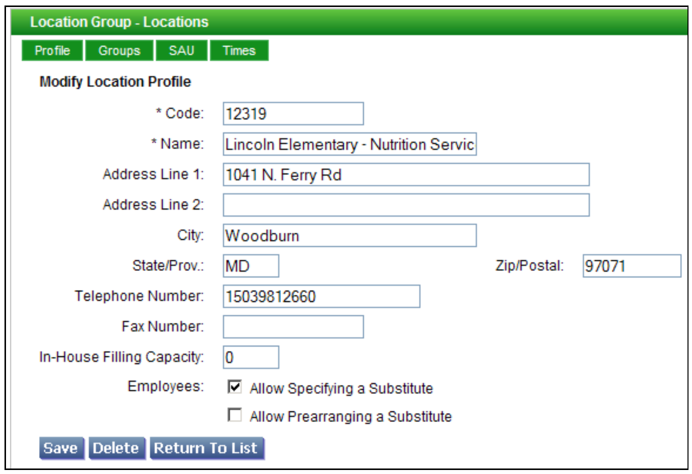
Save Return To List

Field	**Description**
Code	A unique identifier for the location profile.
Name	The name for the location. The name must be unique. It will display on reports and screens when this location is referenced
Address line 1	The address of the location. Information in the address fields is informational only and is not used by the system.
Address Line 2	Additional space for the address of the location.
City	The city where the location is located.
State/Prov	The state or province of the location.
Zip/Postal	The zip/postal code for the location.
Telephone Number	Contact number for the location. The system does not call locations at any time. This field is used for data collection only.
Fax number	The fax number for the location. This field is for data collection only.
In-House Filling Capacity	The number of absences that should be filled with in-house personnel at this location for each workday. This field is only activated if a number other than zero is entered. In-House Filling is further enabled on the Reason and Search Rules setup screens.

Field	Description
Employees: Allow Specifying a Substitute	Indicate if employees at this location can specify a substitute.
Employees: Allow Prearranging a Substitute	Indicate if employees at this location can prearrange a substitute.

Modifying Location Profiles

The following components of a location profile can be modified.



Profile Display, add, modify, or delete location profiles.

Groups Add or delete location groups for the location.

SAU Add or modify SAU (Substitute Allocation Units) limits for the location for a selected period.

Times Add or modify start and end times, and morning and evening callout times for a location.

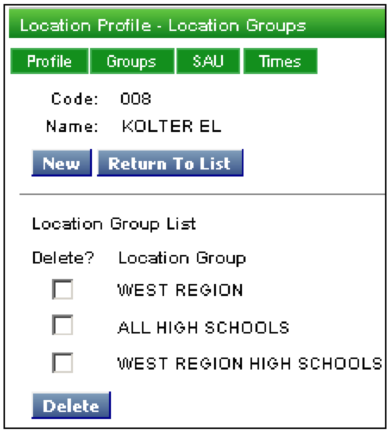
Modifying Profile Information

On the Location list, click the **Code** link for the location you want to modify. The Modify a Location Profile screen is displayed. Update the appropriate fields and click *Save*. Refer to the previous section for field descriptions.

To *delete* a location profile, from the Location list, click the **Code** link for the location you want to delete. The Modify a Location Profile screen is displayed. Click *Delete*. You cannot delete a location that has been used for any job (open, active, finished, or cancelled) currently in the database, or that is assigned to an employee or administrator.

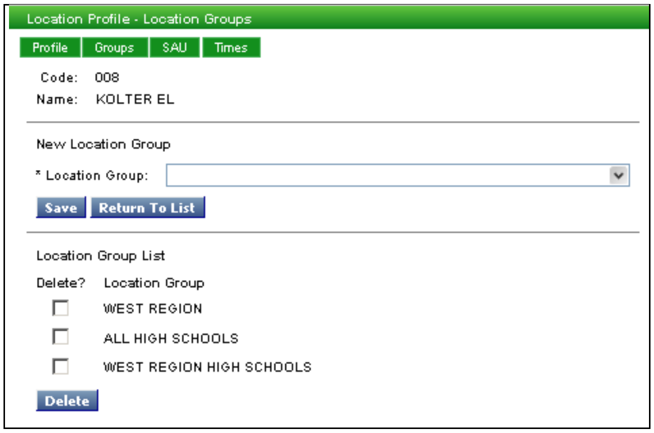
The Groups Screen

The Groups screen lists the location groups for the selected location. Locations can be assigned to multiple location groups. Before a location can be assigned to a location group(s), the group must be set up using the Location Groups function. Once locations are assigned to location groups, they can be used for reporting, setting up reason menus, and for setting up substitute profiles.



Adding/Deleting Location Groups

To *add* a location group to a location profile, click *New* to display the New Location Group screen. The Location Group pull-down menu contains all authorized location groups. Select a location group and then click Save to add the location group to the profile.

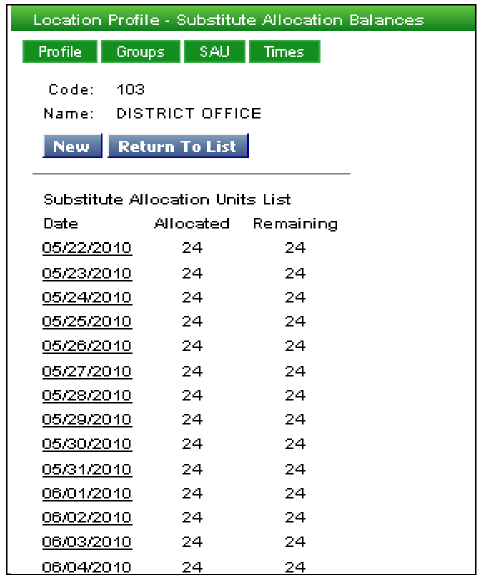


To *delete* a location group, click the deletion box next to the location group you want to delete, and then click *Delete*.

The SAU Screen

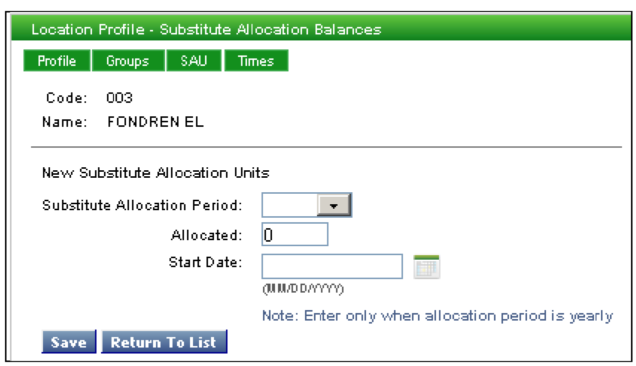
The Substitute Allocation Units (SAU) feature allows each location to define its own limit for the number of absences at that location which may be filled by substitutes over a given period. This gives the location the ability to directly control its budgeted substitute allocation. When a location's SAU limit is reached, all additional absences are reported as No Substitute Required-SAU. This feature prevents employees from specifying and prearranging substitutes once the allotment of substitutes is met. The system tracks the number of SAUs used in each period. The SAU feature is futher enabled on the Reason and Search Rule setup screens.

If SAUs exist for a location, the list of current and future periods is displayed in date order with their allocated and remaining balances.



Adding SAU Information

To add SAU information, click *New*. The New Substitute Allocation Units screen is displayed.
After entering your information, click Save.

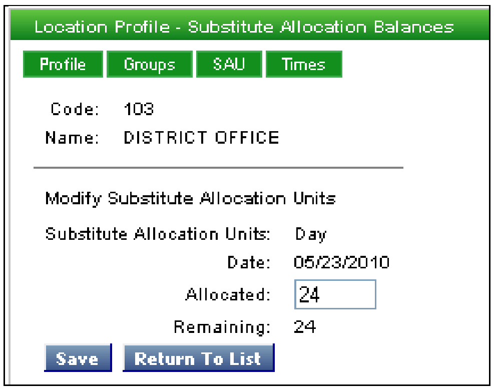


Field Name	**Description**
Substitute Allocation Period	The SAU period for the selected location. Only one period can be established for a location at a time. All locations do not have to use the same period designations. A blank substitute allocation period indicates that this feature is not used. The drop-down menu offers the following options: Day, Week, Month, and Year. Weeks are calculated as starting on Sunday and ending on Saturday. Months are calculated as starting on the first day of the month and ending on the last day of the month. If the allocation period that was already defined is being changed to another allocation period, a message “All existing SAU balances will be removed when

	changing the SAU period." is displayed. You will be asked to confirm that you want to change the SAU period.
Allocated	The allocated value uses work units. Work units are defined on the Classifications screen. That number is entered in this field.
Start Date	Locations that use the Yearly period are required to indicate the start date the year begins. The next one-year period will begin with the same date in the following year.

Modifying SAU Information

To modify SAU information for a selected period, click on the desired **Date** link. The Modify Substitute Allocation Units screen displays. Enter the new allocation and click *Save*.



Field Name	Description
Allocated	The number entered in this field will take the place of the number that was previously entered. SAU limits may be changed as often as desired. This allows for carryover of unused days and for borrowing from future periods when necessary. The system does not automatically carryover or roll over unused units from one period to another. This adjustment must be made manually. To indicate that no substitutes may be assigned to absences for the SAU-limited reasons for a given period, enter a "Substitute Allocation Units" count of zero (0) for that period.
Remaining	This is a display-only field. It shows the number of SAUs unused in each period. This field is calculated from the job records and cannot be modified.

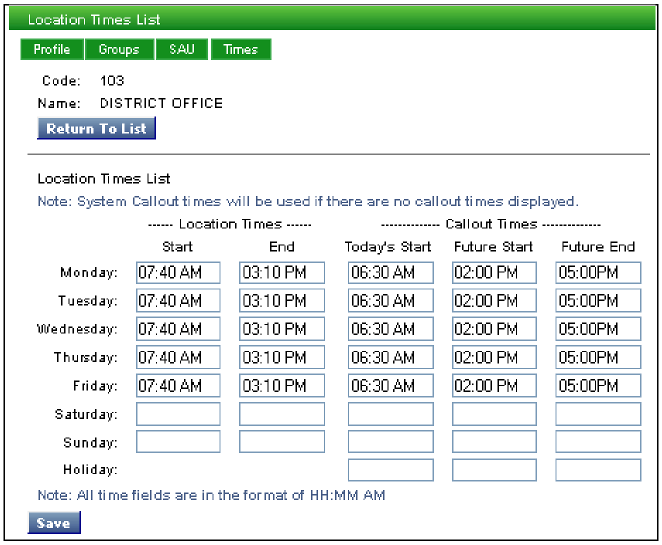
The Times Screen

This screen allows you to add, delete, and modify location start and end times and location callout times.

Callout times are defined using the *Telephone Lines* feature. Default callout times can be changed and applied to individual locations. Possible reasons for setting individual location callout times are:

- Earlier callout times for "hard to fill" schools would help to offer the jobs first to those locations.
- The ability to call secondary schools before elementary schools due to earlier school start times.

The Location Times list displays the current daily callout. Only callout times that differ from the default times set up via the Telephone Lines feature are displayed.



Field Name	**Description**
Location: Start	Enter the start time that the majority of employees assigned to this location report to work. This field is used as the default start time on employee profiles when this location is selected.
Location: End	Enter the end time that the majority of employees assigned to this location end their day. This field is used as the default end time on employee profiles when this location is selected.

Note: *Start and end times are used when creating or importing employee profile data when a time is not specified.*

Today's Start	Today's Start time refers to morning callout. During morning callout, only "open" jobs for the current day are called.
Future Start/End	The Future Start/End time refers to evening calling. During evening callout, all "open" jobs (for tomorrow and all future jobs) are called.

Modifying Location Times

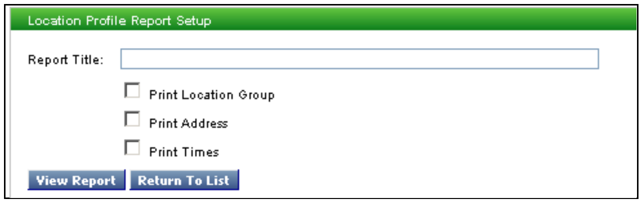
To modify the start and end time for the location, type in the new information and click *Save*. Existing job times on current and future jobs will not be updated.

Modifying Callout Times

To add or delete callout times, update the appropriate fields and click *Save*.

Printing Location Profile Reports

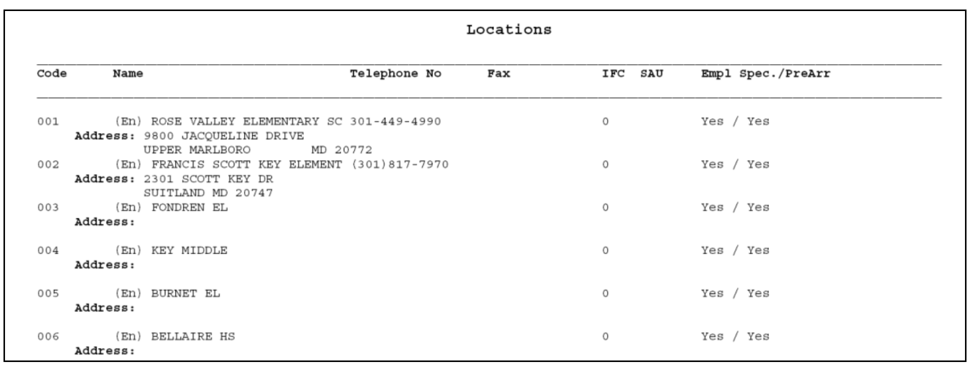
From the Location list, click *Create Report* to create the Location report. The Location report setup screen is displayed. Select the report parameters and click *View Report*.



Field Name	**Description**
Print Location: Group	Displays all of the groups that are assigned to the location, sorted by group name.
Print Address	Displays the address information.
Print Times	Displays the days of the week in chronological order.

If no additional options are selected on the setup screen, the report will print one line per location. The locations will appear in the sort sequence selected before pressing *Search*.

The report automatically displays in the Adobe Acrobat reader. Use the Adobe Acrobat toolbar to print or save the report. A sample report is shown below.


Locations

Code	Name	Telephone No	Fax	IFC	SAU	Empl Spec./PreArr
001	(En) ROSE VALLEY ELEMENTARY SC **Address:** 9800 JACQUELINE DRIVE UPPER MARLBORO MD 20772	301-449-4990		0		Yes / Yes
002	(En) FRANCIS SCOTT KEY ELEMENT **Address:** 2301 SCOTT KEY DR SUITLAND MD 20747	(301)817-7970		0		Yes / Yes
003	(En) FONDREN EL **Address:**			0		Yes / Yes
004	(En) KEY MIDDLE **Address:**			0		Yes / Yes
005	(En) BURNET EL **Address:**			0		Yes / Yes
006	(En) BELLAIRE HS **Address:**			0		Yes / Yes

Voicing Locations

You must record a voicing for each new location so that callers are able to hear the name of the location. To voice a location over the telephone, follow these steps:

1. Select Telephone Voicing from the menu and locate the voicing ID of the new location.
2. Call the system and enter your Access ID followed by the star (*) key, enter your PIN followed by the star (*) key.
3. Press “5” on your telephone keypad to record system voicing.
4. Follow the prompts to record and replay the recording.

Location Groups

Overview

Location Group is a logical grouping of individual locations or other location groups. Location groups may or may not represent a hierarchy of locations as illustrated in the following example.

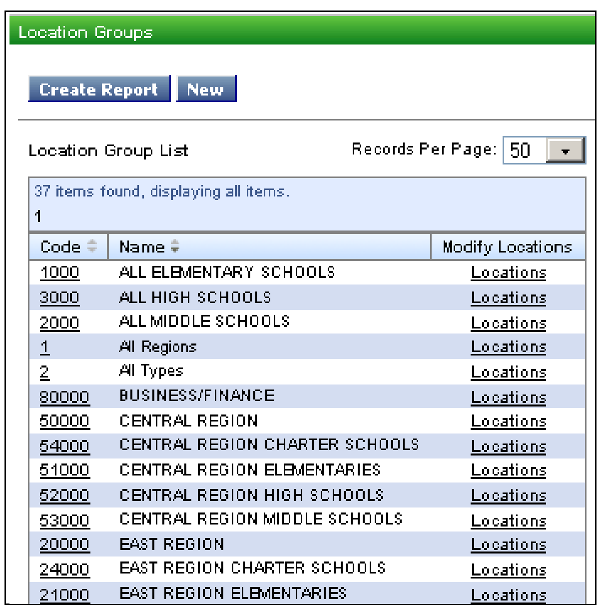
Location Group	**Location/Location Group**
All Locations	West Region East Region North Region
North Region	John St. Elementary Charles Secondary
Secondary	Charles Secondary Discovery Secondary

Locations can be assigned to multiple location groups. Location groups are used to maintain the substitute's profile work locations and priority lists, to set up reason menus, and for inquiry and reporting. To determine the location groups that will be required to set up your system, you will need to know how substitute profiles and priority lists are maintained, and have knowledge of your reporting requirements.

Once locations are assigned to location groups, they can be used for reporting, setting up reason menus, and for setting up substitute profiles.

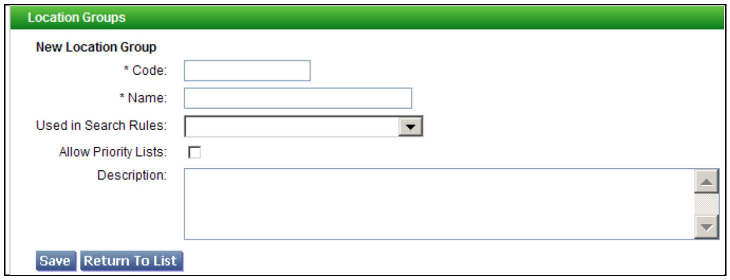
Using the Location Group Screen

Location Groups can be added, deleted or modified from this screen. To create a Location Group report, click Create Report. The Location Group List can be sorted by Code or Name by clicking on the up/down arrow in that column.



Adding Location Groups

Click *New* to display the New Location Group screen. After entering your information, click *Save* to add the location group record.

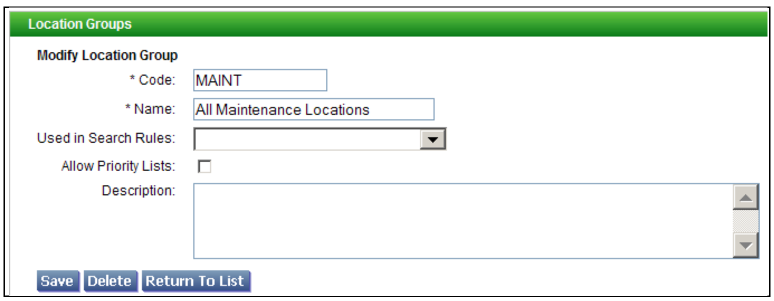


Field Name	**Description**
Code	Unique identifier for the location group. The code may be alphanumeric.
Name	Unique name to identify the location group. This name will display on reports and screens.
Used in Search Rules	Indicates if the location group is to be used in search rules. When creating a search rule list, only groups that have a value in this field will display in the pull-down list and can be selected and placed in the search rule. The options are: *call only this group*, *call only lower groups*, *call this group, then lower groups*. This field works in the following way: If there is a group called “All Regions” that contains groups called Region 1 and Region 2, the following would occur: If *Call only this group* is selected - Substitutes on the “All Regions” priority lists will be called. If *Call only lower group* is selected – Substitutes on the “Region 1” and “Region 2” priority lists will be called. If *Call this group, then lower groups* is selected – Substitutes on the “All Regions” list and the “Region 1” and “Region 2” priority lists will be called. The default value for this field is blank.

Field Name	**Description**
Allow Priority Lists	Checking this box indicates that substitute priority lists exist for this location group. When creating a substitute priority list, only groups that have this field enabled will display on the Locations pull-down list.
Description	The description provides the operator with additional information on why the location group was set up. This information is not used or displayed in the system.

Modifying Location Groups

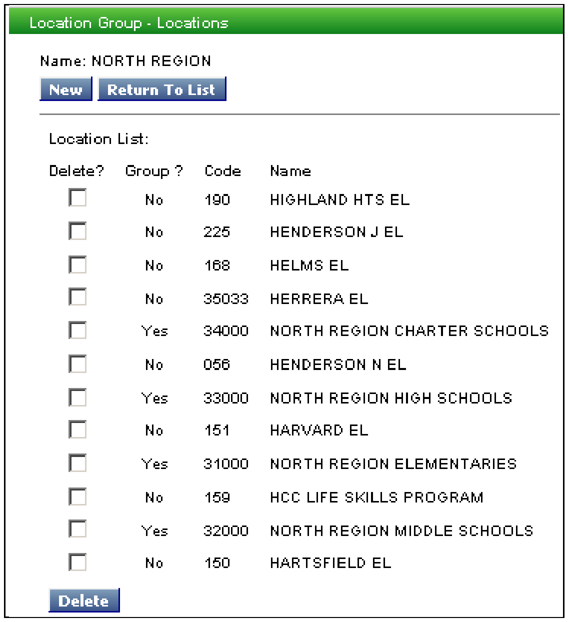
From the Location Group list, click the **Code** link of the location group you want to modify. The Modify Location Group screen is displayed. Update the desired fields and click *Save*. If an error is encountered, the system will display an error message. Make any corrections and click *Save*.



To delete a location group, click on the code of the location group you want to delete. The Modify Location Group screen is displayed. Click *Delete*. Deleting a location group removes substitute work locations, priority lists, and/or reason menus associated with the location group. The system displays a message asking you to confirm the deletion. You can choose to continue, or to cancel the deletion. If you continue with the deletion, all data will be removed from existing profiles.

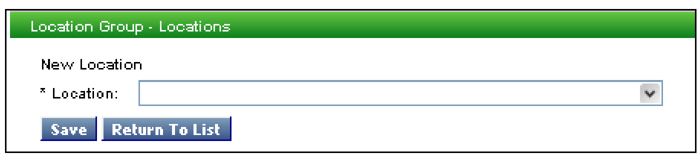
Modifying Locations

You can add or delete locations or location groups from a location group. On the Location Group screen, click the **Locations** link for the location group you want to modify. The Location Group screen is displayed. Locations that belong to the location group are displayed. Location groups are identified from individual locations by the display of ‘Yes” under the *Groups?* heading.



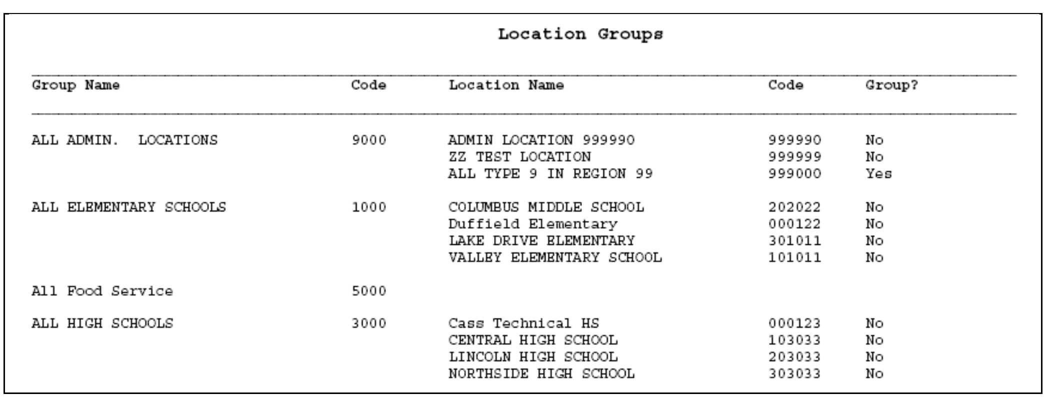
To *delete* a location or location group, click the desired deletion box and then click *Delete*.

To *add* a location or location group, click *New* to display the New Location screen. The location pull-down menu contains all authorized locations and location groups. Make your selection and then click *Save* to add this location or group to the location group.



Printing Location Group Reports

Click *Create Report* on the Location Group screen to print the list of location groups. The report is sorted by group name, location name and then by location code. The report will automatically display in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report. A sample report is shown below.


Location Groups

Group Name	Code	Location Name	Code	Group?
ALL ADMIN. LOCATIONS	9000	ADMIN LOCATION 999990	999990	No
		ZZ TEST LOCATION	999999	No
		ALL TYPE 9 IN REGION 99	999000	Yes
ALL ELEMENTARY SCHOOLS	1000	COLUMBUS MIDDLE SCHOOL	202022	No
		Duffield Elementary	000122	No
		LAKE DRIVE ELEMENTARY	301011	No
		VALLEY ELEMENTARY SCHOOL	101011	No
All Food Service	5000			
ALL HIGH SCHOOLS	3000	Cass Technical HS	000123	No
		CENTRAL HIGH SCHOOL	103033	No
		LINCOLN HIGH SCHOOL	203033	No
		NORTHSIDE HIGH SCHOOL	303033	No

Reasons

Overview

This feature allows you to define Absence/Vacancy reasons for job creation, Decline/Cancel reasons for job declines and job cancellations, and Do Not Use reasons for establishing Do Not Use reasons for substitutes.

Absence/Vacancy Reasons

The reason for an absence or vacancy must always be provided when the job is created. The same list of reasons is used for both absences and vacancies. Before jobs can be reported, employees must exist in the database and the list of absence/vacancy reasons must be entered for employees to select from each time a job is reported.

Absence/vacancy reasons can be entered over the telephone by pressing keys on the telephone keypad that correspond to the reason number. When using a browser, the reason is selected from a drop-down menu. The list of reasons is included on the Quick Reference cards for the employee and administrator to use as a reference. In addition, the list of reasons can be reviewed over the telephone.

Different sets of reasons apply to operators, administrators, and employees. Additionally, reasons are offered based on the setup of reason menus for classification groups and location groups.

Each absence/vacancy reason can include options to restrict the use of the reason.

Decline/Cancel Reasons

A decline/cancel reason is a reason given when a substitute declines a job, or when a substitute or other personnel cancels the substitute's assignment to a job. Decline/cancel reasons are used for data collection purposes only. They do not affect when or why a substitute is called. Tracking these reasons provides valuable information for recruiting and retaining substitutes.

When the "*Require a Reason for Declining an assignment"* parameter is enabled on the Parameters – Substitutes tab, the system prompts substitutes to indicate from a list of decline/cancellation reasons why the substitute has declined a job. When the "*Require a Reason for Canceling an assignment"* parameter is enabled on the Parameters – Substitutes tab, the person canceling is prompted to indicate from a list of decline/cancellation reasons why the assignment is being cancelled.

Do Not Use Reasons

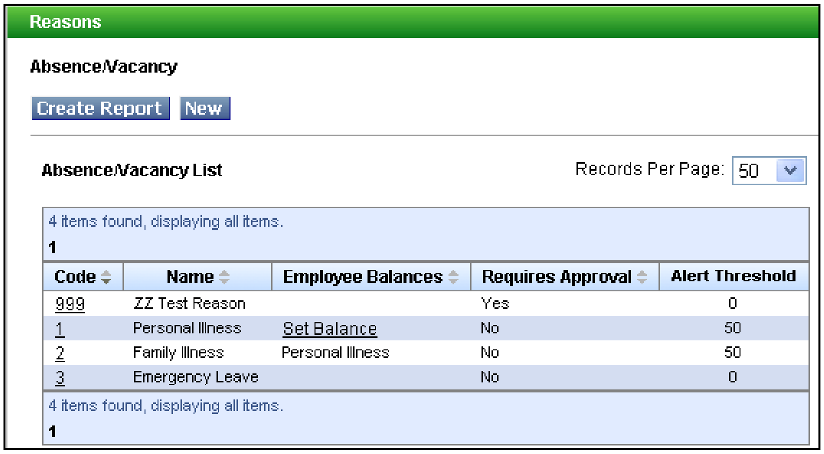
Do Not Use reasons can be assigned for substitutes being put on Do Not Use Lists. Do Not Use reasons are created from the Do Not Use tab.

If Do Not Use entries have an associated reason, the system tracks the number of times a substitute has been placed on a Do Not Use list for a specific reason. The system will automatically send an alert email to designated Operators when a Substitute reaches a threshold for number of times for a single Do Not Use reason (if configured).

The Do Not Use function is optional.

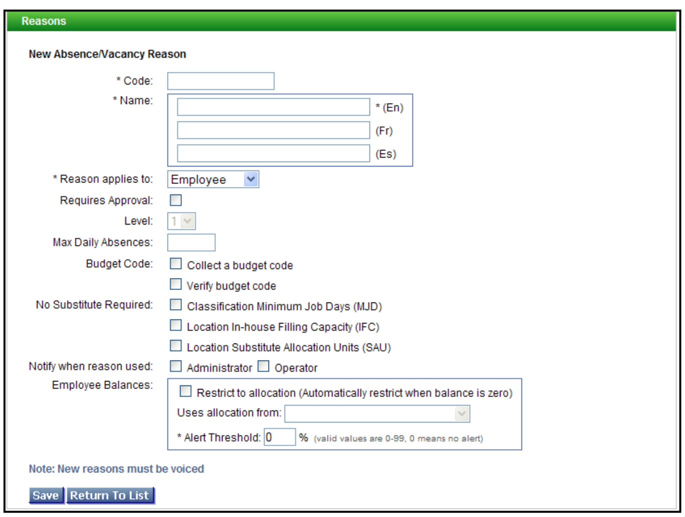
Reasons – Absence/Vacancy

The Reasons – Absence/Vacancy page allows you to create reports and add new reasons. From the Absence/Vacancy List, you can modify and delete reasons and modify employee balances. Employee reason balances can be modified by Classification Group.



Creating New Absence/Vacancy Reasons

Complete the fields on the New Absence/Vacancy Reason page and then click Save to add the new reason. Refer to the following table for descriptions of each field and for input information.



Field Name	Description
Code	Enter a code for the new absence/vacancy reason. The code must be unique and can be alphanumeric.
Name	Enter a descriptive name for the reason. The name must be a unique. It will display on reports and screens when this reason is referenced on pull-down menus, etc.
Reason applies to	From the pull-down menu, select the group for whom the reason applies. If administrators can use the reason, but not employees, select “Administrators. If employees can use the reason, select “Employees.” If only operators can use the reason, select “Operators.” When creating absences or vacancies, operators can choose from all reasons; Administrators can choose from administrator and employee reasons; employees can only choose from employee-defined reasons.
Requires Approval	Checkbox used to indicate if the reason requires absence approval before the absence can occur.
Level	Specifies the level of approval associated with the reason. Approval levels are from 1 through 5. Level 1 is the default and level 5 is the highest approval level that can be assigned. The approval level assigned determines the level of approvals required in the system for the absence to be created for the reason.
Max Daily Absences	Enter a limit for the maximum number of same-day absences or vacancies that may be entered for a given reason system-wide. When the limit for a given reason is reached for a particular day, the system refuses to accept any more absences and vacancies for that day and reason. Another reason must be selected. Each reason's maximum daily absences limit is determined by the entry in that reason's "*Max. Absences*" field: • If the "Max. Daily Absences" field is set to a non-zero number, the system allows no more than the entered number of same-day absences for the given reason. • If the "Max. Daily Absences" field is set to “0,” the system does not set a limit. The feature is not used. **Note**: *When calculating the number of absences for a given day, partial-day absences are counted as if they were whole day absences*.

Budget Code:

Collect a budget code	When this option is selected (the box is checked) for a reason, each time an absence or vacancy is created using this reason, a budget code must be entered or the absence/vacancy cannot be created. **Note**: *This feature should only be used with numeric budget codes. Alpha characters cannot be entered via the IVR.*
Verify budget code	When this option is selected (the box is checked), a budget code that has been “collected,” or entered by an administrator is verified against the list of "Verified Budget Codes.” If not enabled, budget codes are accepted as entered, without verification.

No Substitute Required:

Classification Minimum Job Days (MJD)	The number of days that an employee must be absent before a substitute is required can be specified per classification. The minimum number of days must be set up on the Classifications screen. When the MJD box is checked on a reason, the system checks the “Min. Job Days” field in the classification for the absence or vacancy to see if a substitute is required. If the number of days duration of the absence or vacancy is less than the *minimum job da*ys value, the job is created as “No Substitute Required.” If the number of days duration of the absence or vacancy is greater than or equal to the *minimum job days* value, two jobs are created; one job is created as “No Substitute Required,” and the second job is created for the days that a substitute is required.
Location In-House Filling Capacity (IFC)	A location's IFC is the number of absences and vacancies in any one day that the location can absorb without requiring a substitute. The IFC for a given location is entered in the *In-House Filling Capacity* field on the Location Profile screen. Each location can designate the number of absences that can be covered by in-house personnel. The system determines that the job will be created and assigned a sub-status of “No Substitute Required - IFC” when all of the following conditions are met: • The reason for the job has the *IFC* option enabled (the box is checked) • The job is not marked "No Substitute Required--MJD" due to the "Minimum Job Days" feature • The job is for a search rule that uses IFC • The location's Automatic Assignment List is exhausted • The absence is not a long-term job. If the job meets all of the above criteria, the system checks the location's remaining IFC balance for the day(s) of the absence, then: • If there is sufficient capacity remaining to absorb the absence, the absence is assigned to "Filled In-House" • If there is not sufficient capacity remaining to absorb the absence, the system creates the absence as an open absence, unless prevented by some other criteria • If a multiple-day absence would exceed the location's IFC for any day of the absence, the entire absence is opened for substitutes, unless prevented by some other criteria.

Location Substitute Allocation Units (SAU)	The SAU feature allows each location to have its own limit for the total number of jobs at that location which may be filled by substitutes during a period of a day, week, month, or year. This allows the location to directly control usage of its budgeted substitute allocation. Once the SAU balance has been exceeded, jobs with this reason are created as “No Substitute Required – SAU.” The system maintains a single common total for the count of SAUs used during each period for all reasons that have the SAU feature enabled, rather than a separate total for each reason. A vacancy is not created if the system determines that SAU limitations apply to the vacancy. The SAU limit must also be set up on the Location Profile screen for this feature to be activated. An absence is subject to the SAU feature if all of the following statements apply to the absence: • The absence is not a long-term job as determined by parameter settings • The absence is not marked as "No Substitute Required” or IFC • The job is for a search rule that uses SAU • The caller indicates that a substitute is required for the absence • There is no substitute available on the Automatic Assignment list at the location of the job • The *Location Substitute Allocation Units* field for the reason is enabled. When an absence which is subject to the Substitute Allocation feature is entered, the system checks whether there are at least as many SAUs remaining for the period(s) of the job as the number of work-units the absence will occupy during the period(s): • If enough SAUs are available for the absence, the system creates an open absence (or specified, or pre-arranged job, as appropriate), and seeks a substitute normally. • If not enough SAUs are available, the system creates the absence as an "Exceeded SAU" job
Notify When Reason Used	An Administrator and/or Operator can receive an email alert when this reason is used.

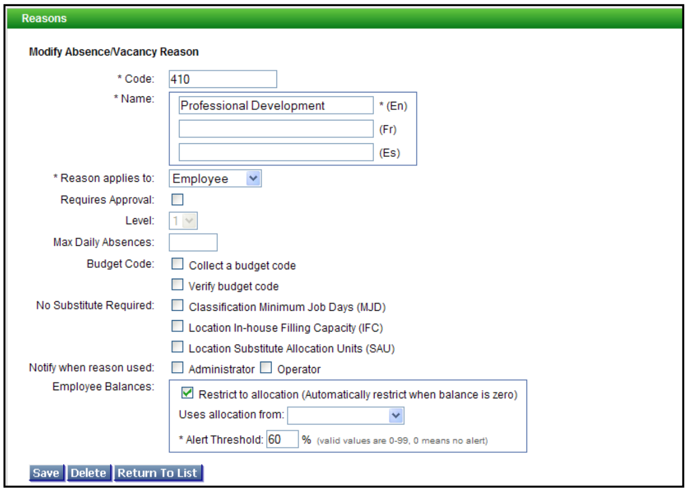
Employee Balances:

Restrict to allocation (Automatically restrict when balance is zero)	When this option is enabled, an employee is limited in the number of hours that can be applied to this reason. Reason balances are allocated, deducted and displayed in minutes/hours. Employees are allocated a reason balance (typically on a yearly basis) in order to limit the number of absences that can be created using a particular absence reason.
Uses allocation from:	To have this reason count towards another reason’s balance, select the reason from the drop-down list. When a reason counts towards another reason, it uses the same balance as the reason it counts toward. Additionally, the Alert Threshold value of the reason it counts toward is automatically applied to this reason.
Alert Threshold	A percentage assigned to this reason to indicate when the usage of the reason will trigger an alert. When the alert threshold value is reached, an email notification can be generated for the employee, administrator and operator (if this feature is configured on the Parameters, Email page).

Modifying/Deleting Reasons

On the Absence/Vacancy List, click on the **Code** link of the reason you want to modify. The Modify Absence/Vacancy Reason screen is displayed. Update the desired fields and then click *Save* to update the reason. If an error is encountered, the system will display an error message. Make any corrections and click *Save*.

The modification will be reflected throughout the system. For example, if changing the name of a reason, all pull-downs and job records will be updated with the new name.



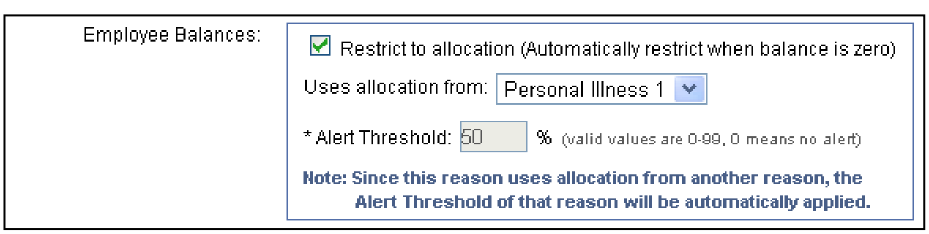
To delete a reason, on the Absence/Vacancy List, click on the code of the reason you want to delete from the database. The Modify Absence/Vacancy Reason screen displays for that reason. Click *Delete* to remove the reason from the list.

You cannot delete a reason that has been used for any job (open, active, finished, or cancelled) currently in the database. You must change the reason for those jobs before you can delete the reason.

If you need to discontinue using a reason without deleting it from the system, change the “Reason Applies to” field to “Operators” to ensure that employees and administrators cannot use that reason.

Modifying Employee Reason Balances

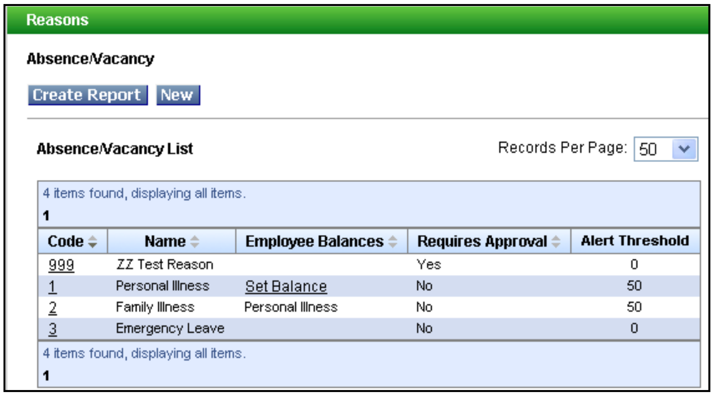
When the *Employee Balances* field is enabled and the reason identified is the reason in the *Uses allocation from* field, the reason balance can be modified for all employees that have a classification in the selected classification group.



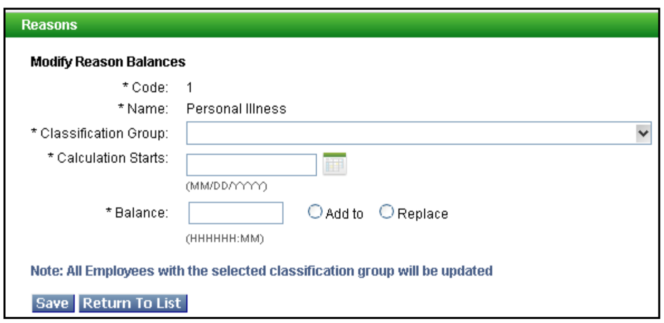
On the Absence/Vacancy List, click the **Set Balance** link of the reason balance you want to modify.

Reasons that have the reason balance functionality enabled will have either a Set Balance link or Reason name displayed in the Employee Balances field.

A reason's balance cannot be set when it counts towards another reason. It uses the same balance as the reason it counts toward. The name of the reason that it counts towards is displayed in the Employee Balances field instead of a **Set Balance** link.



On the Modify Reason Balances page, update the reason balance details and then click Save. Refer to the following table for descriptions of each field and for input information.



Field Name	**Description**
Code	Pre-filled from the Reasons screen.
Name	Pre-filled from the Reasons screen.
Classification Group	Select the classification group from the drop-down menu. Classification groups are sorted by name. The classification group should contain individual classifications and not other classification groups.
Calculation Starts	Enter a valid start date to use for the calculation. This date is used to determine how many absences should be counted. Use the calendar to select a date or enter the date in the specified format.
Balance Add to/ Replace	Enter the reason balance in hours/minutes. Select either the Add to or Replace option.

Creating Reports

From the Absence/Vacancy Reasons screen, click *Create Report*. The Absence/Vacancy report is automatically displayed in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report. A sample of an Absence/Vacancy report is shown below.

Reasons - Absence/Vacancy

Code	Name	Applies To	Max Day	Col.	Ver.	MJD	IFC	SAU	Use Balance	Uses allocation from	Requires Approval	Level
3	(En) Emergency Leave	Employee		No	No	No	No	No	No		No	
2	(En) Family Illness	Employee		No	No	No	No	No	Yes	1	No	
1	(En) Personal Illness	Employee		No	No	No	No	No	Yes		No	
999	(En) ZZ Test Reason	Employee		No	No	No	No	No	No		Yes	1

Voicing Reasons

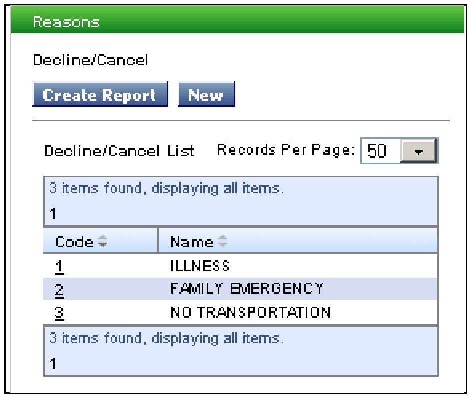
You must record a voicing for each new reason, so callers are able to hear the description of the reason. To voice a reason over the telephone, follow this procedure:

1. Select Telephone Voicing from the menu and locate the voicing ID of the new reason.
2. Call the system and enter your Access ID followed by the star (*) key, enter your PIN followed by the star (*) key.
3. Press “5” on your telephone keypad to record system voicing.
4. Follow the prompts to record and replay the recording.

Note: *Record the description followed by the reason code/number. This method creates a list that tells the caller which numbers to press that correspond to the desired reason. For example, “Illness 1, Personal Day 2.”*

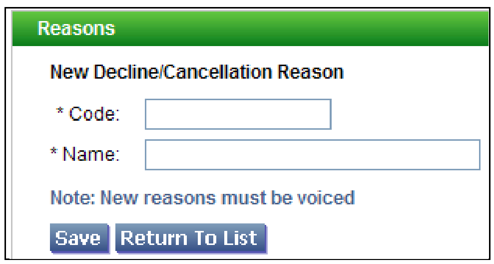
Reasons - Decline/Cancel

The Reasons – Decline/Cancel page allows you to create reports and add new reasons. From the Decline/Cancel List, you can modify and delete reasons.



Creating New Decline/Cancel Reasons

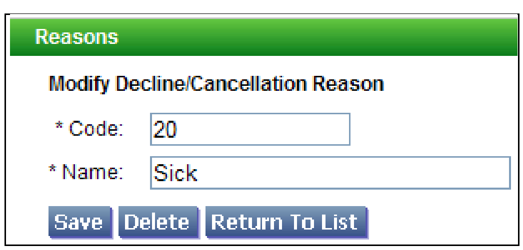
Click *New* on the Decline/Cancel screen to display the New Decline/Cancellation Reason screen. Enter a code and name for the reason and click *Save* to add the reason to the database.



Field Name	Description
Code	Enter a unique identifier for the reason. The code can be alphanumeric.
Name	Enter a descriptive name for the reason. The name must be a unique. It will display on reports and screens when this reason is referenced in pull-down menus, etc.

Modifying/Deleting Decline/Cancel Reasons

On the Decline/Cancel List, click on the code of the reason you want to modify. The Modify Decline/Cancellation Reason screen is displayed. Update the desired fields and then click *Save* to update the reason. If an error is encountered, a message will display and the information can be corrected.



To delete a reason, on the Decline/Cancel List, click on the code of the reason you want to delete. The Modify Decline/Cancellation Reason screen displays for that reason. Click *Delete* to remove the reason from the list.

You cannot delete a decline/cancel reason that has been used for any job (open, active, finished, or cancelled) currently in the database.

Creating Reports

From the Decline/Cancel Reasons screen, click *Create Report*. The Decline/Cancellation report is automatically displayed in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report. A sample Decline/Cancellation report is shown below.

Reasons - Decline/Cancellation

Code	Name
10	Test reason / delete
2	FAMILY EMERGENCY
20	Pregnancy
21	Disability
22	Moved out of District
3	NO TRANSPORTATION
4	JURY DUTY
5	ASKED TO CANCEL
6	WORKING ELSWHERE
7	NOT QUALIFIED
9	OTHER REASONS

Voicing Reasons

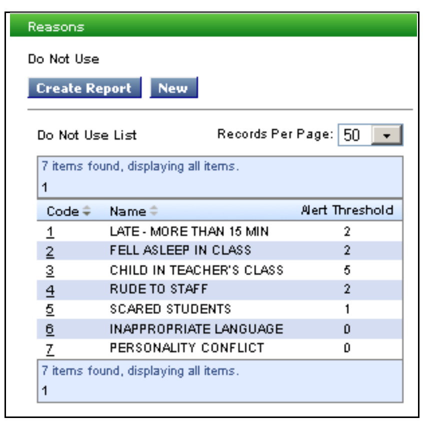
You must record a voicing for each new reason, so callers are able to hear the description of the reason. To voice a reason over the telephone, follow this procedure:

1. Select Telephone Voicing from the menu and locate the voicing ID of the new reason.
2. Call the system and enter your Access ID followed by the star (*) key, enter your PIN followed by the star (*) key.
3. Press “5” on your telephone keypad to record system voicing.
4. Follow the prompts to record and replay the recording.

Note: *Record the description followed by the reason code/number. This method creates a list that tells the caller which numbers to press that correspond to the desired reason.*

Reasons - Do Not Use

The Reasons – Do Not Use page allows you to create reports and add new reasons. From the Do Not Use List, you can modify and delete reasons.



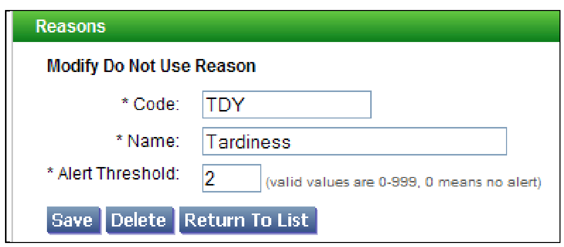
Creating New Do Not Use Reasons

Click *New* on the Do Not Use Reasons screen to display the New Do Not Use Reason screen. The Code, Name and Alert Threshold fields are required fields.

Field Name	Description
Code	A unique identifier for the reason. The code can be alphanumeric.
Name	A descriptive name for the reason. The name must be a unique. It will display on reports and screens when this reason is referenced in pull-down menus, etc.
Alert Threshold	The value that specifies the number of times a substitute can be placed on a DNU list for this DNU reason. When this value is reached, an email alert is sent to Operators configured to receive 'Do Not Use Threshold Email.'

Modifying/Deleting Do Not Use Reasons

On the Do Not Use List, click on the code of the reason you want to modify. The Modify Do Not Use Reason screen is displayed. Update the desired fields and then click *Save* to update the reason. If an error is encountered, a message will display and the information can be corrected.



To delete a Do Not Use reason, on the Do Not Use List, click on the code of the reason you want to delete. The Modify Do Not Use Reason screen displays for that reason. Click *Delete* to remove the reason from the list.

A Do Not Use reason cannot be deleted if in use on a Do Not Use list.

Creating Reports

From the Do Not Use Reasons screen, click *Create Report*. The Reasons – Do Not Use report is automatically displayed in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report.

Reasons - Do Not Use

Code	Name	Alert Threshold
	(Es) Do Not Follow Safety Rules	
109	(En) Does Not Execute Provided Directions	1
	(Fr) Does Not Execute Provided Directions	
	(Es) Does Not Execute Provided Directions	
104	(En) Doesn't Know Subject Material	1
	(Fr) Doesn't Know Subject Material	
	(Es) Doesn't Know Subject Material	
101	(En) Late for Assignment	4
	(Fr) Late for Assignment	
	(Es) Late for Assignment	
110	(En) Left Students Unattended	1
	(Fr) Left Students Unattended	
	(Es) Left Students Unattended	
150	(En) Negative Reaction To Staff	1

Voicing Reasons

You must record a voicing for each Do Not Use reason, so callers are able to hear the description of the reason. To voice a reason over the telephone, follow this procedure:

1. Select Telephone Voicing from the menu and locate the voicing ID of the new reason.
2. Call the system and enter your Access ID followed by the star (*) key, enter your PIN followed by the star (*) key.
3. Press “5” on your telephone keypad to record system voicing.
4. Follow the prompts to record and replay the recording.

Note: *Record the description followed by the Do Not Use reason code/number. This method creates a list that tells the caller which numbers to press that correspond to the desired reason.*

Reason Menu

Overview

Reason menus let you establish a list of absence/vacancy reasons to be used for a specific location group and classification group. Reason menus are created so that the person creating the absence can view, hear, or enter only reasons that apply to their selected location and classification. Reason menus can be used in the following instances:

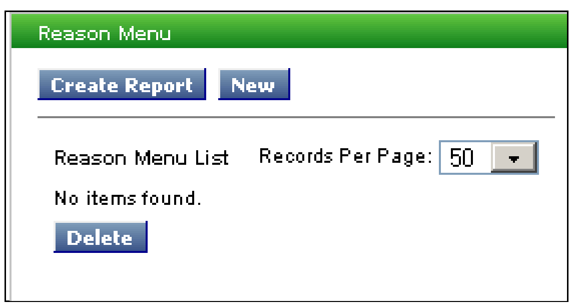
- The system is used by multiple districts and each district has a different set of reason codes
- Teachers enter a different list of reasons than secretaries.
- Different reason codes have been created for teachers and secretaries that use the same reason description because the reason codes are using a different "default budget code." For example,
  01 = Teacher Illness - budget code = 1234
  21 = Secretary Illness – budget code = 5678.

In these instances, by using reason menus, the employee and administrator, when creating an absence, will view or hear only the reasons that apply to their circumstance.

For this feature to be active, the "*Use Reason Menus*" option on the Parameters – General tab must be enabled. Set up the reason menu so that all groups have reasons assigned to them. If a group does not have a reason menu assigned, their pull-downs and voicings will be blank.

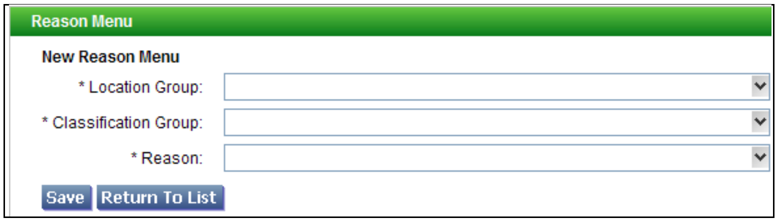
Using the Reason Menu Screen

Use this screen to add or delete reason menus and print Reason Menu reports. Reason Menus display by location group. The Reason Menu list can be sorted by the column headers by clicking on the up/down arrow in that column.



Adding/Deleting Reason Menus

On the Reason Menu screen, click *New* to display the New Reason Menu screen. Enter the required information and then and click *Save.*



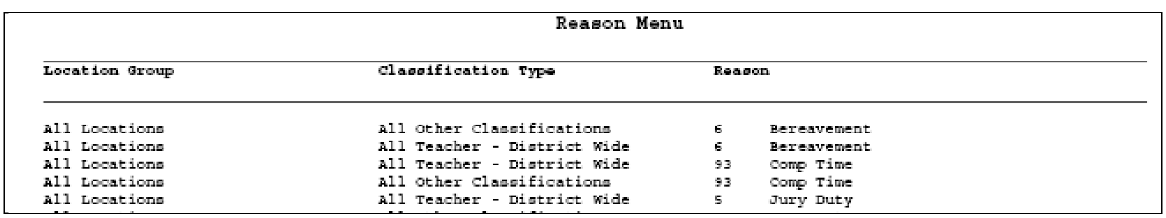
Field Name	**Description**
Location Group	The pull-down menu displays all location groups sorted by name.
Classification Group	The pull-down menu displays all classification groups sorted by name.
Reason	The pull-down menu displays all defined reasons sorted by name.

To d*elete* a reason menu:

From the Reason Menu list, click the deletion box next to the reason menu(s) you want to delete and then click *Delete* to remove the reason menu from the list.

Printing Reason Menu Reports

From the Reason Menu list, click *Create Report*. The report will automatically display in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report. A sample report is shown below.



Reason Menu

Location Group	Classification Type	Reason	
All Locations	All Other Classifications	6	Bereavement
All Locations	All Teacher - District Wide	6	Bereavement
All Locations	All Teacher - District Wide	93	Comp Time
All Locations	All Other Classifications	93	Comp Time
All Locations	All Teacher - District Wide	5	Jury Duty

Search Rules

Overview

Search Rules determine how the system is going to find a qualified substitute to fill an assignment. Each classification has a search rule attached to it. The search rule determines which lists apply to jobs for a given classification, and the order in which those lists are used in order to call substitutes. Search rules are designed to meet the needs of specific types of absences. The system provides four standard search rules: Typical I, Typical II, Specialized I, and Specialized II. Additional search rules can be created to meet a location's needs and policies. These are called custom search rules. Refer to the section on Custom Search Rules for more information.

While search rules determine the order in which lists are used for a job's location and classification, the search type determines where the system starts calling on each *level* within a given list. Refer to the "Classifications" section for detailed information on search types.

Standard Search Rules

This section describes each search rule and includes an illustration of the steps performed in each search rule. Within each step, *sublists* and *levels* are used to designate the order calls are made within a list. The step in the list corresponds with the step that appears on the job detail indicating how far the system has gone in using the search rule for a specific job.

The Restart Search step in the search rule indicates that the system starts over for each individual job in its search through prior lists beginning with Step 1. If substitutes have been added to the list after the job has been called out on and the system has gone through the lists, the new substitutes on the list will be considered for the job opportunity. The restart allows another opportunity for the system to call qualified substitutes who were not reached on the first attempt. Substitutes who declined the job are not called again. Substitutes are called in ID order once the search type has determined the starting substitute for the list and sublist.

The Do Not Use list is always consulted prior to qualifying any substitute to be called.

Typical I

This search rule is the most common. It attempts to meet employee and location requests for substitutes before moving to substitute profile information. The substitute's profile is used in this search rule to create the classification and general lists. This rule is recommended for teachers and general-duty assignments that do not require special licensure. The classification list is created from the classifications that are listed on the substitute's profile.

This search rule uses the following features:

- Minimum Job Duration
- In-House Filling
- Substitute Allocation Units
- Automatic Assignments

Step	List
1 – 6	Automatic Assignment Lists
7	Specified Substitute
8 – 13	Preferred Lists
14	Classification List

Step	List
15	Restart Search
16	General Location List
17	Restart Search

The following table shows the breakdown of Steps 1- 6 for the Automatic Assignment List and the order the Automatic Assignment lists are called. This example uses a Science teacher from Lincoln High School to show how the lists work.

Step	List	Notes/Examples:
1	Employee Classification	Science
2	Location Classification	Lincoln HS - Science
3	All Locations Classification	Whole District - Science
4	Employee	
5	Location	Lincoln HS
6	All Locations	Whole District

The following is a breakdown of the order of the Preferred Lists, how steps 8-13 are called.

Step	List	Notes/Examples:
8	Employee Classification	Science
9	Location Classification	Lincoln HS - Science
10	All Locations Classification	Whole District - Science
11	Employee	
12	Location	Lincoln HS
13	All Locations	Whole District

Typical II

This search rule is designed to intensify the search for qualified substitutes when it is preferred, but not required, that the substitute be specially qualified. The system calls the classification list before the location's preferred list for this search rule. The classification list is created from the classifications that are listed on the substitute's profile. This search rule is recommended for those teaching positions where the desire is to match the classification to the absence before the location's preference of substitutes. The primary difference between this search rule and Typical I is that the Classification list is called before the location's Preferred lists.

This search rule uses the following features:

- Minimum Job Duration
- In-House Filling
- Substitute Allocation Units
- Automatic Assignment

Step	List
1 – 6	Automatic Assignment Lists
7	Specified Substitute
8	Classification List
9	Restart Search
10 – 15	Preferred Lists
16	General Location List
17	Restart Search

The following table shows the breakdown of Steps 1- 6 for the Automatic Assignment List and the order the Automatic Assignment lists are called.

Step	List	Notes/Examples:
1	Employee Classification	Science
2	Location Classification	Lincoln HS - Science
3	All Locations Classification	Whole District - Science
4	Employee	
5	Location	
6	All Locations	Whole District

The following is a breakdown of the order of the Preferred Lists, how steps 10-15 are called.

Step	List	Notes/Examples:
10	Employee Classification	Science
11	Location Classification	Lincoln HS - Science
12	All Locations Classification	Whole District - Science
13	Employee	
14	Location	Lincoln HS
15	All Locations	Whole District

Specialized I

This search rule is the most restrictive. The system calls lists where substitutes are matched with the job's classification. If a classification match is not found, the job is unfilled. If no qualified substitute is found, the absence is left unfilled. This search rule uses the *Minimum Job Duration* feature. This search rule is recommended for personnel that need special licensure or training such as nurses, bus drivers, and interpreters.

Step	List	Notes/Examples
1	Specified Substitute	
2	Employee Preferred - Classification	Nurse
3	Location Preferred - Classification	Washington Elementary – Nurse
4	All Locations Classification	Whole District – Nurse
5	Classification List	Nurse
6	Restart Search	

Specialized II

This search rule is designed for employees whose substitutes do not have to be strongly qualified, such as clerical workers or teacher aide positions. A substitute who has only Specialized II classifications can be called during a general list search for Specialized II jobs only. A substitute with only Specialized II will not be considered for General list absences for other search types.

This search rule uses the following features:

- Minimum Job Duration
- General List calls substitutes having at least 1 classification with this search rule.

Step	List	Notes/Examples
1	Specified Substitute	
2	Employee Preferred - Classification	Special Education Aide
3	Location Preferred - Classification	Washington Elementary - Special Education Aide
4	All Locations Classification	Whole District - Special Education Aide
5	Classification List	Special Education Aide
6	Restart Search	
7	General Location List	All Substitutes with a Specialized II classification in their profile
8	Restart Search	

Designing Custom Search Rules

The standard search rules give you considerable flexibility in controlling how the system selects and calls qualified substitutes. You can modify a standard search rule by re-ordering the sequence of the lists, or by adding/removing lists that do not apply. Additionally, the system can utilize "custom" search lists designed to meet your policies and contract requirements. Once a custom list is created and placed in the search rule, you can then add substitutes to your list by using the *Priority List* feature.

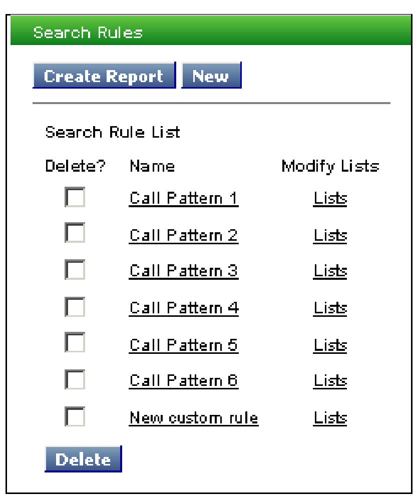
An example of defining and using a custom list could be the creation of a list called, “Unqualified.” The Unqualified list might contain teachers at that location who have no classifications, and who can be called on the day of the job.

Note: *Custom search rules should be documented as to why the lists are used and why they are in the specified order.*

Contact eSchool Solutions for assistance in determining which of the standard search rules will best meet your needs for a given classification, or to discuss having a custom search rule developed.

Using the Search Rule Screen

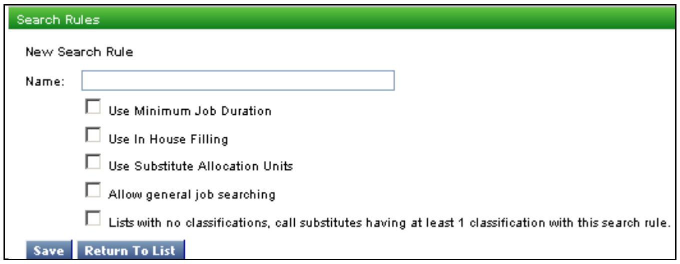
This screen allows you to add, modify, and delete search rules and search rule lists, and print search rule list reports.



If search rules exist, they are listed in name sort order when this screen displays.

Adding Search Rules and Search Rule Lists

On the Search Rule screen, click *New*. The New Search Rule screen is displayed. After selecting the parameters for the search rule, click *Save* to add this search rule to the database.



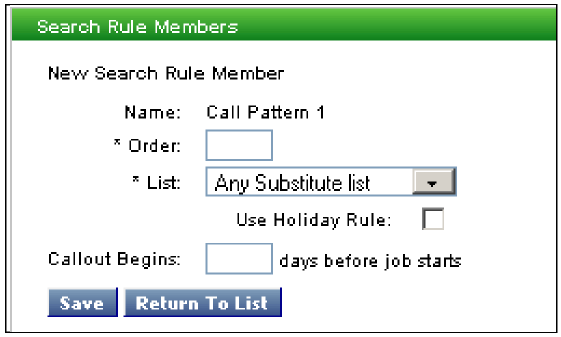
Field Name	Description
Name	Name for the new search rule. The name must be unique.
Use Minimum Job Duration (MJD)	This parameter indicates that this feature is used in this search rule. Classifications and Reasons must also be set up to use this feature. This parameter defines the shortest absence for that classification which can require a substitute. This prevents a substitute from being assigned to the first day(s) of absences for designated classifications. When the MJD for a classification is set to any number other than zero, the system checks to see if all absences entered for that classification are shorter than the MJD. Absences that equal or exceed that limit are split into two jobs, each with a different job number. The first job, for the beginning of the absence, is marked "No Substitute Required – MJD," and is one day shorter than the MJD setting. The second job, for all remaining days of the absence, is created as per the user's specifications, unless affected by other system criteria. Specifically, substitutes on a location's Automatic Assignment list will not be assigned to any absences shorter than the MJD limit for the absentee's classification. However, they can be assigned to the portion that is equal to, or exceeds the MJD limit. Also, the MJD feature overrides a request for a specified substitute, or an attempt to prearrange the absence for any portion of an absence that is shorter than the MJD for the absentee's primary classification.

Field Name	Description
Use In-House Filling	This parameter indicates that this feature is used in this search rule. Location Profiles and Reasons must also be set up to use this feature. This parameter defines the number of absences that should be filled with in-house personnel at this location for each workday before a substitute can be assigned.
Use Substitute Allocation Units	This parameter indicates that this feature is used in this search rule. Location Profiles and Reasons must also be set up to use this feature. This parameter allows each location to have its own limit for the number of absences at that location which may be filled by substitutes during a given period. This gives the location the ability to directly control its budgeted substitute allocation. When a location reaches its limit of the units requiring substitutes for a given time period, all additional absences are reported as *No Substitute Required-SAU*. This prevents employees from specifying and prearranging substitutes once the allotment of substitutes is met. The system tracks the number of SAUs used in each period from one year prior to the current date to one year after the current date. Historical tracking begins with the first period for which this information is entered, and expands as each period is completed until the historical record contains one full year of past information.
Allow General Job Searching	This parameter allows all substitutes that call in or log on to the system to view the job regardless of whether the IVR is calling from that step. The substitute must still qualify for the job to hear or view the job. Using this feature will allow less-qualified substitutes to view and accept jobs before your more highly qualified substitutes. Please use considerable caution when considering this feature.
List with no classifications, call substitutes having at least 1 classification with this search rule	When search lists are processed that do not "use a classification," the substitute must have at least one classification that belongs to this search rule to be considered for the list.

After you have created the new search rule and it appears on the Search Rule list, click the **Lists** link for the newly created search rule. The Search Rules – Lists screen displays. Click *New*. The New Search Rule List screen is displayed. The name of the search rule is displayed at the top of the screen.

To build the new search rule list:

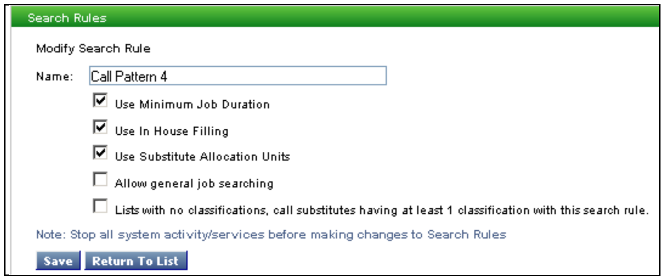
- Enter the order number for each step. The order must be numeric.
- Select the list to apply to that step. Some lists require additional parameters.
- Enter the number of days before the start of the job that callout on the job should begin. This field is optional.
- Click *Save* to add the step to the search rule. The new search rule displays on the bottom half of the screen. When the process of adding steps is complete, click the *Save* button on the Search Rule-Lists screen to add this new search rule to the database.



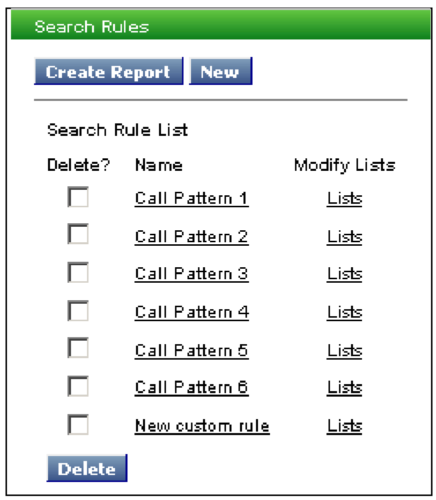
Field Name	**Description**
Name	The name of the search rule is carried over from the Search Rule screen.
Order	Enter the number of the step in the search rule where the list is to apply. The order number is entered one step at a time. The step number cannot already be in use in the rule.
List	The pull-down menu displays all defined standard lists and custom lists. The list you select determines what additional fields, if any, need to be defined for the rule. For the *Preferred, Auto Assignment*, and *Do Not Use* lists, also indicate if the Classification list should be used, and in the Type field, select the type of list, either location or employee. If "Location," you have the option of selecting a location group from the pull-down list. For all list selections, except *Auto Assignment* and *Restart*, the *Use Holiday Preferred List* checkbox will display. Check, this box if special holiday processing rules are to apply to this list. Lists that include this special processing will have higher priority over lists that do not. In the search rule, lists that use a Holiday Preferred List must precede a list that does not. For the *Custom* list, also indicate if the Classification list should be used, if the Location or Employee list should be used, and enter a name for the custom list. The name must be unique. The *General Classification List* calls substitutes that have the classification in their profile, but not the job's location. The *Any Substitute List* calls substitutes even if the location and classification is not in their profile. For the *Restart Search* list also indicate the order number where the system should start over in its search through prior lists. The default is "1." A valid order number must be entered.
Callout Begins___ days before job starts	Enter the number of days before the job starts for the system to begin callout on this list. The values are: Blank begin callout immediately. This is the default. 0 begin callout the day of the job. 1 begin callout one day before the job. The value must be between 0 and 365.

Modifying/Deleting Search Rules

To *modify* search rules, click the **Name** link of the search rule you want to modify. The Modify a Search Rule screen displays. You can modify the name of the rule and the parameters for the rule. Click *Save* after your updates are complete.



To *delete* search rules, on the Search Rule List screen, click the deletion box next to the rule you want to delete, and then click *Delete*.



The search rule and the search rule list records are deleted. If classifications exist that use this search rule, the search rule cannot be deleted.

Modifying Search Rule Lists

To modify search rule lists, click the **Lists** link of the search rule list you want to modify. The Search Rule - Lists screen displays the current search rule list. Complete your changes to the list and then click *Save*.

To delete a step from a search rule list, click the deletion box next to the step you want to delete and click *Save*. If you remove all the steps on the list, click *New* to display the New Search Rule List screen to add new steps. The name of the search rule is carried over to the new screen.
Click *Reset* to cancel your pending changes and redisplay the list.

Search Rule Members

Name: Call Pattern 2

New | Return To List

Search Rule Members List

Delete?	Order	List	Uses Hol Rule	Uses Class	Type	Group	Restart #	# Days
☐	1	Specified Substitute	No					
☐	2	Preferred	No	Yes	Employee			
☐	3	Preferred	No	Yes	Location			
☐	4	Preferred	No	Yes	Location	All Types		
☐	5	Preferred	No	Yes	Location	All Regions		
☐	6	Preferred	No	Yes	Location	All Locations		
☐	7	Classification List	No		Location			
☐	8	Restart Search					1	

Save | Reset

Printing Search Rule Reports

From the Search Rule list, click *Create Report* to print the report. The report is sorted by search rule name and then by order. The report is automatically displayed in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report. A sample report is shown below.

Search Rules

Name Order	List	Class?	Uses: Holiday?	MJD? Type	IFC?	SAU? Group	Gen Search?	Class?	Restart#	# Days
Specialized I				No	No	No	Yes	No		
1	Preferred	Yes	Yes	Location						
2	General Location List		Yes							
3	Preferred	Yes	No	Location						
4	Preferred	Yes	No	Location						
5	Preferred	Yes	No	Location		All Regions				
6	Preferred	No	No	Location						
7	Classification List		No							
8	Restart Search		No						1	
9	Unqualified	No	No	Location						
Specialized II				Yes	No	No	Yes	No		
1	Specified Substitute		No							
2	Preferred	Yes	No	Employee						
4	Preferred	Yes	No	Location						
7	Classification List		No							
8	Restart Search		No						1	
9	General Location List		No							
10	Restart Search		No						1	
Typical I				No	No	No	Yes	No		
1	Auto Assignment	Yes	No	Employee						
2	Auto Assignment	Yes	No	Location						
3	Auto Assignment	Yes	No	Location						
4	Auto Assignment	Yes	No	Location		All Regions				
5	Auto Assignment	Yes	No	Location		All Locations				
6	Auto Assignment	No	No	Employee						
7	Auto Assignment	No	No	Location						
8	Auto Assignment	No	No	Location						
9	Auto Assignment	No	No	Location		All Regions				
10	Auto Assignment	No	No	Location		All Locations				

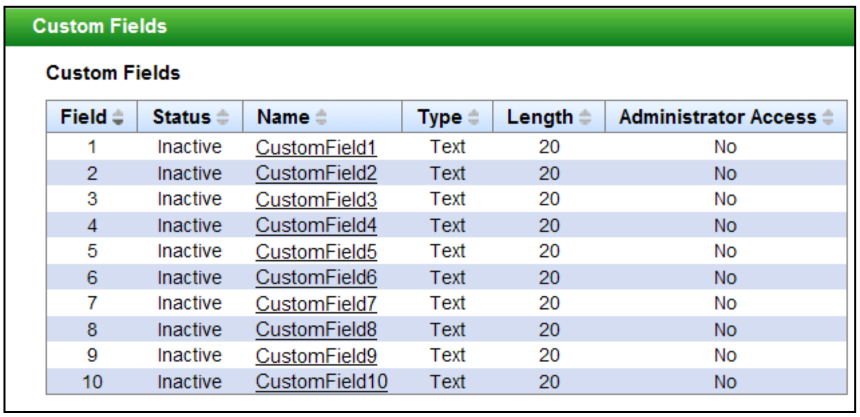
Custom Fields

Overview

This feature provides 10 "spare" fields on the Profile record that can be used to store and use additional district-specific information. The New Profile page contains a “custom fields” section. Only the custom fields with the status of “active” will appear on the Profile page. Administrators can add the custom field values at the time the profile is created. Operators can control administrator access to custom fields by setting the View/Modify permissions on the Administrator Profile - Menu Access page.

Configuring/Modifying Custom Fields

The Custom Fields configuration page enables operators to activate and configure the parameters for custom fields. Custom fields can be configured as text, numeric or date fields. Custom field parameters are modified by clicking on the Name link for the custom field.



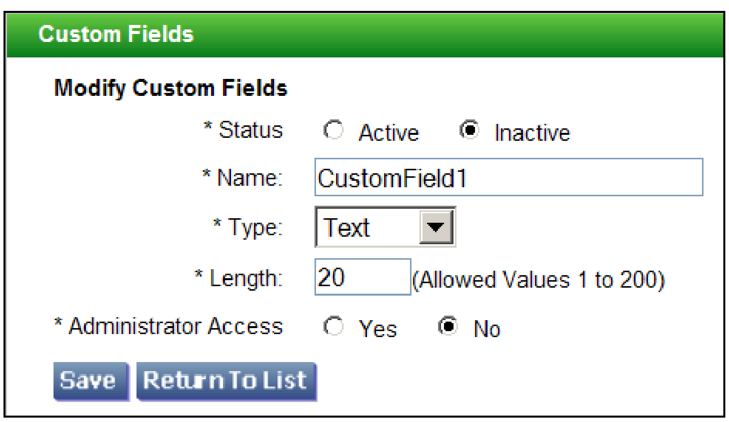
Custom Fields

Custom Fields

Field	Status	Name	Type	Length	Administrator Access
1	Inactive	CustomField1	Text	20	No
2	Inactive	CustomField2	Text	20	No
3	Inactive	CustomField3	Text	20	No
4	Inactive	CustomField4	Text	20	No
5	Inactive	CustomField5	Text	20	No
6	Inactive	CustomField6	Text	20	No
7	Inactive	CustomField7	Text	20	No
8	Inactive	CustomField8	Text	20	No
9	Inactive	CustomField9	Text	20	No
10	Inactive	CustomField10	Text	20	No

Configuring Custom Fields

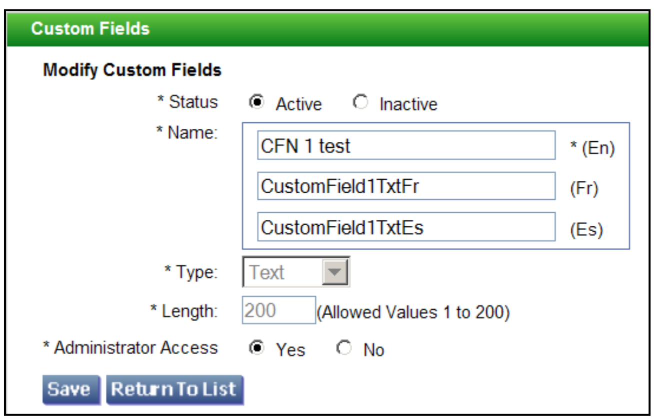
To configure the parameters for a custom field, click on the Name link for the custom field. The Modify Custom Fields page is displayed. Provide the required information for the custom field and then click Save.



Field Name	Description
Status	Custom fields can be active or inactive. Only custom fields with an "Active" status display on the Profile page.
Name	Unique name assigned to the custom field. Clicking on the Name link for a custom field displays the Modify Custom Fields page.
Type	Custom fields can be configured as text, numeric or date fields. If the field type is date, the format must be YYYY/MM/DD.
Length	Number of characters must be between 1 and 200. If the custom field type is Numeric, the number of characters must be between 1 and 200 and all characters must be numbers.
Administrator Access	Indicates if the custom field is configured for administrator access. Only custom fields that are configured for administrator access will appear on the Profile page of the Administrator module. If the custom field is configured for Administrator Access, only administrators with view/modify permission will have access to the custom field.

Modify Custom Fields Page

The parameters for a custom field can be modified by clicking on the custom field "Name" link on the Custom Fields page. The Modify Custom Fields page is displayed. The Status, Name and Administrator Access fields can be modified. The values in the Type and Length fields will appear grayed and are not editable.



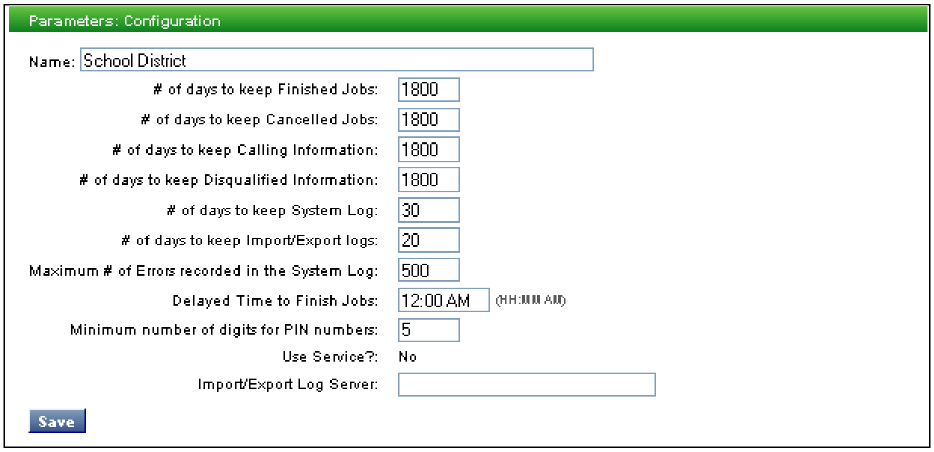
Parameters Menu

Parameters in SmartFind*Express* allow trained personnel to control the operation of many of the system's optional features. In most cases, these parameters are adjusted during installation so that the system operates at peak efficiency in your environment. Parameters are changed only when you wish to start or stop use of an optional feature. Many SmartFind*Express* parameters interact with other parameters and features. The effect of changing a given parameter is not always obvious, especially when other parameters and features are involved. It is recommended that you make no changes to the system parameters unless you have discussed the proposed change(s) with an eSchool Solutions Client Services Representative and completely understand the effects of these changes.

Parameter	Description
Configuration	Set values for the length of time to keep data in the system, PIN number setup, and other global configuration settings.
General	Set values for Reason Menus, general settings for jobs, budget codes, and browser access options.
Jobs	Set values for job creation, job cancellation, telephone access, and holiday processing rules.
Telephone	Set values for telephone dialing, pausing jobs on the telephone and other dialing configurations.
Administrator	Set values for administrator accessibility for browser and telephone options.
Employee	Set values for employee telephone and browser access.
Substitute	Set values for substitute telephone and browser access and other general substitute parameters.
Email	Set values for the generation of job and assignment email notices.

Configuration Parameters

The Parameters: Configuration page collects information on global system configuration parameters. After entering the system configuration parameters, click *Save*.



The following table describes each parameter and provides information on the values to enter for the optimal functioning of your system.

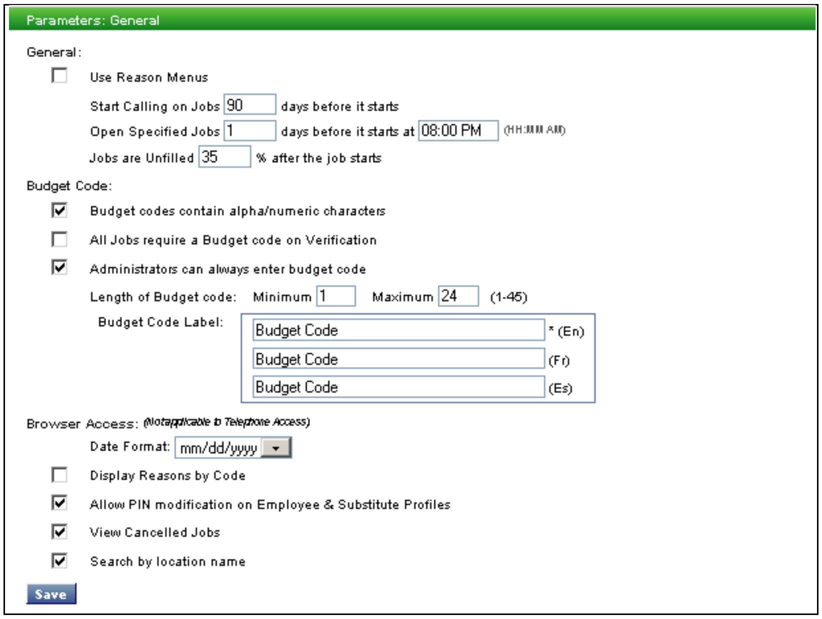
PARAMETER	DESCRIPTION/ACTION
Name	The name entered here will display in the header of reports and screens. The operator can revise the content of this field.
# of Days to Keep Finished Jobs	Finished job segments are retained for the number of days indicated by this parameter. After the designated number of days, jobs are removed from the database. The maximum that job information can be retained is five years (1825 days). It is recommended that you retain finished job information for at least the length of your school year, or longer to be able to print end-of-year job reports.
# of Days to Keep Cancelled Jobs	Information about job and assignment cancellations is retained for the number of days indicated by this parameter. After the designated number of days, cancelled jobs are removed from the database. The maximum that job information can be retained is five years (1825 days).

PARAMETER	DESCRIPTION/ACTION
# of Days to Keep Calling Information	Information on all call attempts made on each job, and all job transactions (assignments, cancellations, etc.) is retained for the number of days indicated by this parameter. After the designated number of days, the information is discarded. The maximum that job information can be retained is five years (1825 days). Calling information may be useful when researching unemployment claims.
# of Days to Keep Disqualified Information	Information on all disqualified substitutes for each job is retained for the number of days indicated by this parameter. After the designated number of days, the information is discarded. The maximum that job information can be retained is five years (1825 days). Disqualified information may be useful when researching unemployment claims.
# of Days to Keep System Log	Information on the system activity log is retained for the number of days indicated by this parameter. Activity log records with a message type of "ERROR" are kept for seven days, but records with a message type of "INFORMATION" will use the value entered in this field. Thirty days is the maximum number of days that system log information can be retained.
# of days to Keep Import/Export Logs	Information on system import and export files is retained for the number of days indicated by this parameter. After the designated number of days, the information is discarded. The maximum that this information can be retained is five years (1825 days).
Maximum # of Errors Recorded in the System Log	This number is a total error count parameter, regardless of the number of days to keep the logs. Errors that occur when calling substitutes or processing data are recorded in the activity log along with informational messages about successful interactions. The system will keep the specified number of errors indicated by this parameter. This indicator prevents the system from running out of disk space by recording the same continuous error. It is recommended that this field be set to "1000." The number of existing errors appears in the notification area of the home page. If 1000 errors are logged, Client Services should be called.
Delayed Time To Finish Jobs	Once a job is in finished status, the administrator cannot extend the dates of the job on the telephone or via the browser. This parameter allows the job to stay at *open* or *active* status, so the administrator can extend the job if the absent employee has called to say that they cannot come to work on the following day. It is recommended that the time entered be one hour after the end time of the latest school in the system. This allows enough time for administrators to modify jobs at the end of their workday.
Minimum Number of Digits for PIN Numbers	This parameter controls the number of digits personnel must enter when choosing their PIN or when assigning a PIN. The longer the number, the more secure it is considered to be, within reason.

Parameter	**Description/Action**
Use Service?	This parameter is set by eSchool Solutions. If eSchool Solutions provides SmartFind*Express* as a service, "Yes," is displayed in this field. Some configuration options are not available to districts that use SmartFind*Express* as a service. Service is defined as not having SmartFind*Express* hardware onsite.
Import/Export Log Server	Displays the location (TCP/IP address) of the server that is used to store and display the import/export log files. This setting is used if there is more than one server.

General Parameters

The Parameters: General page collects information on global general parameters, budget code management options, and browser access options. After entering the general parameters, click *Save*.



The following table describes each parameter and provides information on how SmartFind*Express* operates if the parameter is enabled (box checked) or disabled (box unchecked). It also provides information on the proper values to enter for the optimal functioning of your system.

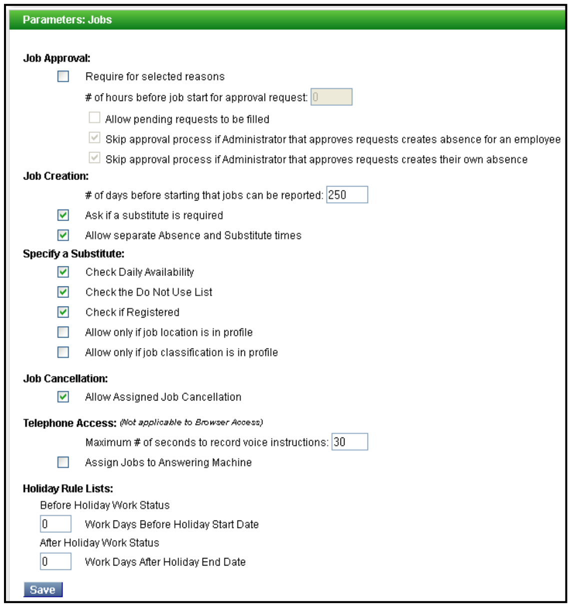
PARAMETER	DESCRIPTION/ACTION
General:	
Use Reason Menus	This parameter determines if a menu of reasons will be offered over the telephone or browser. If checked, Reason Menus must be set up to identify the reasons that can be offered. If this feature is disabled, one list of Reasons is used. This option can be used if you have separate reasons for teachers, administrators, and classified personnel or for various locations. For example, Classified personnel are allowed a vacation reason and teachers are not. The reason "vacation" will only be seen and heard if you belong to that classification or location group.
Start Calling on Jobs__Days Before it Starts	The system waits to find a substitute until the number of days indicated by this parameter. Set the parameter to *zero* to allow the system to offer any open job immediately, regardless of how far in advance the job is entered. To have the system wait until the day the job starts, enter **1**. To have the system wait until the day before the job starts, enter **2**. The maximum number of days prior to a job start that calling can begin is 365 days.
Open Specified Jobs __ Days Before it Starts at (hh:mm am)	Jobs that are created with a requested (specified) substitute will be offered only to that substitute until the deadline entered here or until the specified substitute declines the job, takes another job during that same time period or becomes unavailable. At this time, the system begins to offer the job to other substitutes. Prior to this time, it tries to reach the specified substitute every hour during

PARAMETER	DESCRIPTION/ACTION
	callout. To release jobs to other substitutes on the day of the job enter *zero*. To release jobs on the day before the job starts, enter **1**. To release jobs two days before the job starts, enter **2**. The maximum number of days prior to the start of the job that the job can be offered to substitutes other than the specified substitute is 365 days. When that day is reached, the "At" field indicates how long on that day to hold the job for the specified substitute. At the time indicated, the system attempts one more time to reach the specified substitute. Then other substitutes are called. The time must be entered in HH:MM am/pm format. If a substitute is requested the morning of a job and the parameter is set to one (1) day before the job starts, that particular substitute will only get one phone call that morning to be offered the job. The system will then release the job to other substitutes because the job is past the time specified.
Jobs are Unfilled__% after the Job Starts	This parameter determines when the system should cease trying to find substitutes for an open job. It is entered as a percentage in order to apply to jobs that start at different times of the day. Enter 0% if jobs should stop callout and be marked as unfilled when the job starts. If you want the system to call substitutes after the job has started, consider the following method: • Decide on what is the shortest amount of time you will pay a substitute. If it is a half-day, enter 40-45%. That would give the substitute time to get to the job from home for at least four (4) hours of an eight (8) hour job. Select the percent of the job that represents the minimum number of hours you will pay a substitute for working. Add some time for travel to the location. Subtract this total from 100% and enter the difference in this field.
Budget Code:	
Budget Codes contain Alphanumeric Characters	This parameter allows a budget code to contain alpha and special characters. When entering budget codes, the entry is validated for numeric values only if this parameter is unchecked. If the *collect budget code* feature is enabled on the Absence/Vacancy Reasons setup, and absences are being entered on the telephone, this parameter should not be enabled because the IVR only accepts numeric entries via the telephone.
All Jobs Require a Budget Code on Verification	This feature ensures that each job record has a budget code entered. If this parameter is enabled, when finished job are verified, the job is validated to ensure that there is a budget code entered on the job. If this parameter is not checked, the program does not check for the presence of a budget code on the job record.
Administrators can always enter Budget Code	This parameter controls whether an administrator can override and enter budget codes during job creation. If enabled, during absence/vacancy creation, if a budget code is entered, it overrides the default budget code set for the location or location group. If disabled, a budget code can be entered only when the absence reason has been set up to collect a budget code.

PARAMETER	DESCRIPTION/ACTION
Length of Budget Code: Minimum/Maximum	When a budget code is entered during job creation or modified, the length of the budget code can be validated to ensure that the correct number of digits/characters has been entered. A minimum and maximum value of *zero* indicates that a budget code is not being used and will not display in the system.
Budget Code Label	The label for this field can be changed to the verbiage used by the location. This label appears on all screens where the budget code label and value appear.
Browser Access	
Date Format	Select a date format for entering and displaying all dates in the system including dates on reports. The default is MM/DD/YYYY.
Display Reasons by Code	If this parameter is checked, Reasons in the drop-down list are displayed in reason code order. The reason code and reason name appear in the drop-down list. If this parameter is not checked, Reasons are shown in alphabetical order by reason name.
Allow PIN Modification on Employee and Substitute Profiles	If this parameter is checked, administrators and operators can change employee and substitute PIN numbers via the browser. If unchecked, the operator or administrator cannot change a PIN, however they are allowed to reset the PIN number. Resetting the PIN will force the employee or substitute to reset their PIN before using the system.
View Cancelled Jobs	If this parameter is checked, administrators, employees, and substitutes can view cancelled jobs. Jobs that are cancelled are easily identifiable on the Job List as “CANCELLED.” Cancelled jobs cannot be modified.
Search Locations by Name Lookup	If this parameter is checked, the Location Search button will be visible on screens when searching for a location by name.

Job Parameters

The Parameters: Jobs page collects information on options that impact the absence approval feature, job creation and cancellation, substitute assignments, telephone access, and holiday processing rules. After entering the job parameters, click *Save*.



The following table describes each parameter and provides information on how SmartFind*Express* operates if the parameter is enabled (box checked) or disabled (box unchecked). It also provides information on the proper values to enter for the optimal functioning of your system.

PARAMETER	DESCRIPTION/ACTION
Job Approval:	
Require for selected reasons	Enabling this parameter turns on the Absence Approval feature.
# of hours before job start for approval request	The value entered in this field determines the number of hours before a job starts that an approval request can be entered into the system. The system will not allow the request to be entered if the job start time is less than the number of hours configured in this parameter. When an absence request is denied due to this parameter setting, the system sends an email to the administrator and to the employee.

PARAMETER	DESCRIPTION/ACTION
Allow pending requests to be filled	If checked, callout on jobs that are pending approval is allowed. Jobs can go into callout before the absence request has been approved. When this parameter is enabled: • The substitute assigned to the absence is not available for other jobs. • If the absence request is DENIED before the job starts, the job is automatically cancelled by the system and the substitute receives an assignment cancellation email and SCAN call. • If the absence is still PENDING at job start time, the job is not automatically cancelled by the system; however an administrator can manually cancel the job. The job goes into Finished status, with an "approval pending" status. The job can still have an assigned substitute in this case if the district was allowing jobs to be filled before approval.
Skip approval process if Administrator that approves requests creates absence for an employee	If enabled, the approval process is skipped if the Administrator that approves requests creates an absence for an employee.
Skip approval process if Administrator that approves requests creates their own absence	If enabled, the approval process is skipped if the Administrator that approves requests creates their own absence.
Job Creation:	
# of Days Before Starting, that Jobs can be Reported	This parameter controls when employees, administrators, and operators can report a job. The job cannot have a start date that is farther in the future than the number of days in this field. The end date of the job is not checked by this parameter. The maximum number that can be entered is 365 days. This field has no impact on when the system begins to place calls to substitutes for the job. The *Start Calling on Jobs__Days Before it Starts* parameter controls when SmartFind*Express* begins to place calls for a job.
Ask if a Substitute is Required	This parameter determines if the system should ask, each time an absence is reported, whether a substitute is required for the absence. If this feature is enabled, absences that do not require a substitute can be reported for classifications that normally require a substitute to be found. If this box is not checked, the prompt is not played or shown and the system assumes that all absences require substitutes. Employees with a classification that never requires a substitute are exempt from this parameter.
Allow Separate Absence and Substitute Times	This parameter disables the requirement of having both the absence and substitute times be the same when creating or modifying a job. If enabled, the job will have only one set of times that apply to both the employee and substitute.

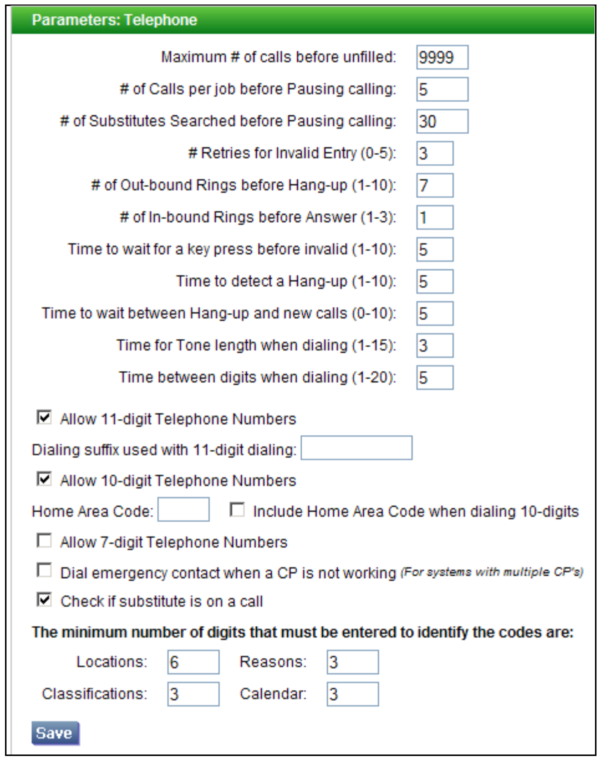
PARAMETER	DESCRIPTION/ACTION
Specify a Substitute:	
Check Daily Availability	This parameter determines if the profile of a requested substitute is checked by the system to see if that substitute is available for the job. A check in this box directs the system to check the substitute's profile and prevent that substitute from being requested if unavailable. If the parameter is enabled and a substitute is unavailable, the system will indicate that the substitute cannot be requested because the substitute is unavailable during the time of the job. If this box is not checked, a substitute can be requested despite being unavailable for the job.
Check the Do Not Use List	This parameter determines if the Do Not Use list is checked when a substitute is specified. This applies to job creation by an employee, administrator, or operator. A check in this box indicates that the system will check the Do Not Use list and prevent the caller from requesting a substitute that is on a location's Do Not Use list. In addition, the DNU restriction applies to searches conducted on the Substitute Profile Inquiry page and on the following Substitute reports: Substitute Detail, Substitute List, Substitute Statistics and Substitute Labels.
Check if Registered	If this parameter is checked, a substitute can be specified only if registered in the system. If the substitute is not registered, they cannot be specified.
Allow only if Job Location is in Profile	If this parameter is checked, substitutes can be specified only if they have the job location in their profile as a work location. In the browser, and if the Name Lookup button is pressed; only substitutes that meet this restriction will be displayed. If this parameter is not checked, all substitutes can be specified regardless of their location setup.
Allow only if Job Classification is in Profile	If this parameter is checked, substitutes can be specified only if they have the job classification in their profile. In the browser, and if the Name Lookup button is pressed; only substitutes that meet this restriction will be displayed. If this parameter is not checked, all substitutes can be specified regardless of their classification setup.
Job Cancellation:	
Allow Assigned Job Cancellation	This parameter allows employees, administrators, and operators to cancel jobs that have a substitute assigned. A check in this box allows job cancellation. If jobs are not yet assigned to a substitute, they can be cancelled regardless of the setting of this parameter.

PARAMETER	DESCRIPTION/ACTION
Telephone Access: (Not applicable to Browser Access)	
Maximum # of Seconds to Record Voice Instructions	This parameter indicates the maximum number of seconds that voice instructions can be recorded. The instructions are played to substitutes that are offered the job and to administrators and operators that are reviewing jobs. These instructions provide general job information to substitutes. Voice instructions should not be used to leave messages for a particular substitute. The maximum recording time is 240 seconds (four minutes). It is recommended that your recording is no longer than 30 seconds because the longer the message, the longer the job description, which is played each time that the job is offered to a substitute. This can dramatically impact the number of calls that can be made on a job in a given amount of time. When complicated instructions are required, the caller reporting the absence should direct the substitute to an alternative way to receive instructions.
Assign Jobs to Answering Machine	If this parameter is checked, when the system calls a substitute for a job and detects that there is an answering machine, it will treat the call as an “Accept” and assign the substitute to the job. When the substitute determines that they have been called, the substitute can call the system or use the browser to access the jobs to which they have been assigned. When this parameter is enabled, a checkbox displays on the Substitute profile, Optional Information tab. When checked, the substitute can be assigned to jobs by leaving a message on their answering machine. Operators and administrators can update this checkbox if their profile has Modify Profile enabled. New profiles have this checkbox disabled.
Holiday Rule Lists	
Note: *This feature allows substitutes that work during the “before holiday” period to receive preference for jobs during the “after holiday” period. The preference order is determined by the list setup in the Search Rules. This feature is enabled by entering a value in both the before and after holiday work status fields. The holiday period is defined in the “All Locations” calendar.*	
Before Holiday Work Status __Work Days Before Holiday Start Date	Enter the number of workdays prior to the holiday start date that special holiday processing rules will apply. This is a two-digit field. The default is blank or zero. This feature allows for substitutes who work during the defined “before holiday” period to receive preference for jobs that fall after the holiday. The system calculates the “before holiday” workdays using the number entered in this field. On the calendar, these workdays are labeled “Before Status.” **Note**: *If both Holiday Rule Lists parameters are left blank, the Use Holiday Preferred List checkbox will not display on the Calendar or on Search Rule screens.* **Note**: *When a value is changed for this parameter, the system will display a confirmation message. Click “Yes” to confirm and save the changes made.*

PARAMETER	**DESCRIPTION/ACTION**
After Holiday Work Status __Work Days After Holiday End Date	Enter the number of workdays after the holiday end date that special holiday processing rules will apply. This is a two-digit field. The default is blank or zero. Substitutes who worked during the “before holiday” period are given “after holiday” preferred status for jobs. The system calculates the “after holiday” workdays using the number entered in this field. On the calendar, these workdays are labeled “After Status.” **Note**: *If both Holiday Rule Lists parameters are left blank, the Use Holiday Preferred List checkbox will not display on Calendar or on Search Rule screens.* **Note**: *When a value is changed for this parameter, the system will display a confirmation message. Click “Yes” to confirm and save the changes made.*

Telephone Parameters

The Parameters: Telephone page collects information on telephone call parameters. After entering telephone parameters, click *Save*.



The following table describes each parameter and provides information on how SmartFind*Express* operates if the parameter is enabled (box checked) or disabled (box unchecked). It also provides information on the proper values to enter for the optimal functioning of your system.

PARAMETER	DESCRIPTION/ACTION
Maximum # of Calls before Unfilled	Jobs go *Unfilled* when one of the following conditions occur: • Calling has completed all steps in the search rule • The parameter setting for the percentage after the start time before jobs go unfilled has been exceeded and no substitute has been assigned to the job. This parameter sets a limit on how many calls the system will make on a job before changing the status to *Not Filled* regardless of which step the calls are in. Once this limit is reached, the job cannot be opened for callout. If SmartFind*Express* is hosted by eSchool Solutions as a service, this field is not updateable.

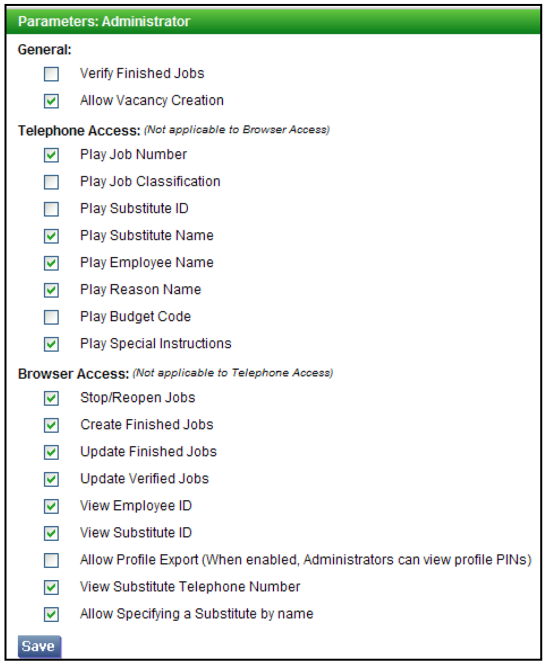
PARAMETER	DESCRIPTION/ACTION
# of Jobs before Pausing Calling	This parameter controls the number of call attempts the system will make on a given open job before pausing callout on that job to allow callout on other jobs. Enter the number of attempts from 1 through 9999 that the system should make. When all open jobs have been paused, paused jobs are automatically un-paused and callout is resumed. It is recommended that the value entered be in the range of 3 to 7 call attempts. If substitutes readily accept jobs, higher numbers work well because that number of calls will rarely be made for a particular job. If many calls result in a failure to reach substitutes, lower numbers should be used to allow the system to address more jobs. **Note**: *This parameter works in conjunction with the "# of Substitutes Searched before Pausing Calling" setting. Jobs are paused when the value entered in either of these two fields is reached.*
# of Substitutes Searched before Pausing Calling	This parameter controls the maximum number of substitutes from 1 through 9999 that the system will consider calling for a job before pausing callout on that job to allow callout on other jobs. The system keeps a count of all substitutes it has been unable to call for a given job. When it finds a substitute it can attempt to call, the system starts the count over. If the count reaches the number in this field, SmartFind*Express* automatically pauses callout on the job and looks for another *open* job. When all open jobs have been paused, paused jobs are automatically un-paused and callout resumes. It is recommended that the value entered be in the range of 20 to 50 substitutes. The recommended number depends on the size of your substitute database. If many substitutes are expired, unavailable, or are not registered, higher numbers work better. If most substitutes are frequently available, are not expired, and are registered, lower numbers are suggested. **Note**: *This parameter works in conjunction with the "# of Jobs before Pausing Calling" setting. Jobs are paused when the value entered in either of these two fields is reached.*
# of Retries for Invalid Entry (0-5)	If the IVR detects an invalid entry response from the person on the telephone, the number indicated by this parameter is the number of times the person can enter invalid data before the system disconnects. Three attempts is the default.

PARAMETER	**DESCRIPTION/ACTION**
# of Outbound Rings before Hangup (0-10)	This parameter specifies the number of out-bound rings the system will allow before it hangs up on an outgoing call. The default is four rings.
# of Inbound Rings before Answer (1-3)	This parameter specifies the number of in-bound rings the system will allow before it answers the call. One is the default.
# Time to Wait for a Key Press before Invalid (1-10)	This parameter specifies the amount of time that the system will wait for a key press before the call is determined to be invalid. Ten seconds is the default.
Time to Detect a Hangup (1-10)	This parameter specifies the time the system waits before determining that a call was a hang-up. One hundred milliseconds (or 1) is the default.
Time to Wait between Hangup and New Calls (0-10)	This parameter specifies the number of seconds the system will wait between validating a hang-up and placing a new call. Zero is the default.
Time for Tone Length when Dialing (1-15)	If the system is dialing too fast, this parameter allows the Tone length to be specified. Five is the default. The measurement is in milliseconds.
Time between Digits When Dialing (1-20)	If the system is dialing too fast, this parameter defines the time between dialing each digit that the system should wait. Ten is the default. The measurement is in milliseconds.
Allow 11-digit Telephone Numbers	A check in this box indicates that the system can call substitutes whose callback number has eleven digits, such as long distance numbers.
Dialing suffix used with 11-digit Dialing	This parameter is used to enter access codes or a PIN needed for dialing long distance numbers. If any digits appear in this field, they will be dialed after the 11-digit telephone number. If this feature is used, commas may need to be placed prior to the digits to indicate a pause. Each comma represents a two-second pause. For example*, “,,,,123”* will result in an eight-second pause before dialing *123*.
Allow 10-digit Telephone Numbers	A check in this box indicates that the system can call substitutes whose callback number has only ten digits, such as numbers that must have the area code, but are not long distance.
Home Area Code	This parameter identifies the area code of the system phone number. This field is used in conjunction with the *Include Home Area Code* feature and applies only to 10-digit telephone numbers. There must be an area code in the “*Home Area Code*” field in order to use this feature.
Include Home Area Code when Dialing 10 Digits	This parameter indicates if the system includes the “home area code” when dialing 10-digit callback numbers that contain that area code. A check in this box tells SmartFind*Express* to use all ten digits when dialing. If unchecked, the system will only dial the last seven digits of 10-digit numbers with the same area code as the *Home Area Code* field.
Allow 7-Digit Telephone Numbers	A check in this box indicates that the system can call substitutes whose callback number has only seven digits.

PARAMETER	DESCRIPTION/ACTION
Dial emergency contact when a CP is not working (For systems with multiple CPs)	If enabled, the call processor will dial the number of the emergency contact defined in the Administrator profile. System configurations with a single call processor or server will not use this feature because when that call processor is down, no other call processor is available to place the notification call.
Check if Substitute is on a Call	If enabled, then before making a call to a substitute, the system checks to see if the substitute's access ID is already fully logged into the IVR system. If yes, the system will not make a call, nor will it update the telephone monitor. If no, the telephone monitor display is updated to indicate that the substitute is being called.
The minimum number of digits that must be entered to identify the codes are:	
Locations	The minimum number of keys that must be pressed when a location code is entered on the telephone.
Classifications	The minimum number of keys that must be pressed when a classification code is entered on the telephone.
Reasons	The minimum number of keys that must be pressed when a reason code is entered on the telephone.
Calendar	The minimum number of keys that must be pressed when a calendar code is entered on the telephone.

Administrator Parameters

The Parameters: Administrator page collects information that determines what will be included on the job summary verbal reports that location administrators hear when they call the system. After entering Administrator parameters, click *Save*.



The following table describes each parameter and provides information on how SmartFind*Express* operates if the parameter is enabled (box checked) or disabled (box unchecked).

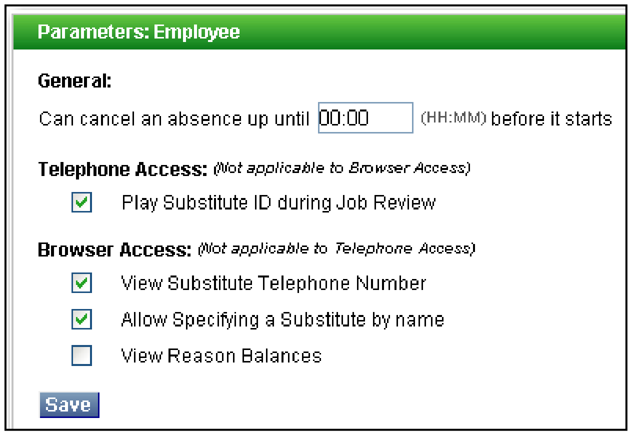
PARAMETER	DESCRIPTION/ACTION
General:	
Verify Finished Jobs	If this parameter is checked, location administrators can view and verify finished jobs. Jobs are verified from the list of jobs (where a page of jobs can be verified), the job modification screen, or on the telephone. If this parameter is not checked, jobs cannot be verified and references to this option are not displayed or heard.
Allow Vacancy Creation	This parameter indicates if administrators can report jobs for which no employee is absent, but a substitute is needed. A check in this box allows administrators to report vacancies for their location(s) only.
Telephone Access: (Not applicable to Browser Access)	
Play Job Number	The job number for each job is played first.
Play Job Classification	The classification of the job is played.

Parameter	Description/action
Play Substitute ID	The substitute's Access ID is played.
Play Substitute Name	The recording of the assigned substitute's name is played. If a name is not played, the job is still open. Open jobs are played first. When an administrator hears the assigned substitute's name or "no substitute required," this indicates that all other jobs that will be heard are filled.
Play Employee Name	The recording of the absentee's name is played.
Play Reason Name	The reason for the absence or vacancy is played.
Play Budget Code	The budget code that was entered when the absence or vacancy was created is played.
Play Special Instructions	The voice recording made by the caller who reported the job is played. The length of this recording will vary. A maximum limit is set for all special instructions on the *Jobs* tab.
Browser Access: (Not applicable to Telephone Access)	
Stop/Re-open Jobs	If this parameter is checked, administrators can view and use the Stop and Re-Open buttons on job modification for Open and Stopped jobs. Stopping a job will stop the IVR from any further callout on the jobs. Re-open will resume callout. If this feature is not checked, the Stop and Re-open buttons are not displayed.
Create Finished Jobs	If this parameter is checked, administrators can create *finished* jobs. If this feature is not checked and an administrator tries to create a finished job, an error message will display. A finished job is a job after the absence has occurred, for example, entering an absence for yesterday. **Note:** *Operators can backdate jobs regardless of the administrator setting for this parameter.*
Update Finished Jobs	If this parameter is checked, administrators can modify the reason, schedule, budget code, and assigned substitute information on a finished job. If this parameter is not checked, the Update and Verify buttons will not be visible on the Job Modification screen.
Update Verified Jobs	If this parameter is checked, administrators are able to modify jobs in the 'Verified' status without having to contact the system administrator/operator to make the changes.

PARAMETER	DESCRIPTION/ACTION
View Employee ID	If this parameter is checked, the employee ID is displayed throughout the Administrator module. This will also include the External ID and PIN if allowing the administrator to view employee profiles (set up on individual administrator profiles). If this parameter is not checked, the employee ID cannot be entered and is not displayed in the Administrator module. To search for an employee, the *Name Lookup* button must be used. If the access ID of the employee contains a SSN or SIN, this feature can be used to protect the privacy and confidentiality of this information.
View Substitute ID	If this parameter is checked, the substitute ID is displayed throughout the Administrator module. If this parameter is not checked, the substitute ID cannot be entered and is not displayed in the administrator module. To search for a substitute, the *Name Lookup* button must be used. If the access ID of the substitute contains a SSN or SIN, this feature can be used to protect the privacy and confidentiality of this information.
Allow Profile Export	If this parameter is checked, administrators can view the profile PINS of employees, substitutes and other administrator profiles at their location via the exports. If this parameter is disabled, the Export button does not display on the Employee or Substitute Profile Inquiry pages.
View Substitute Telephone Number	If this parameter is checked, the telephone number of substitute is displayed throughout the Administrator module. If this parameter is not checked, the telephone number is not displayed. This feature can be used to protect the privacy and confidentiality of the substitute's telephone number. **Note:** *If the View option for Substitute Profiles is enabled on the individual administrator profile and a number is in the Telephone Number field, it will be visible to the administrator even if this parameter is disabled.*
Allow Specifying a Substitute by Name	If this parameter is checked, the Administrator can specify a substitute by name. The *Name Lookup* button is visible if this option is enabled for the Administrator on the Menu Access screen. If the *Name Lookup* button is not accessible and substitutes can be specified, their Access ID must be entered.

Employee Parameters

The Parameters: Employee page collects information on global parameter settings for employees. After selecting the employee parameters, click *Save.*

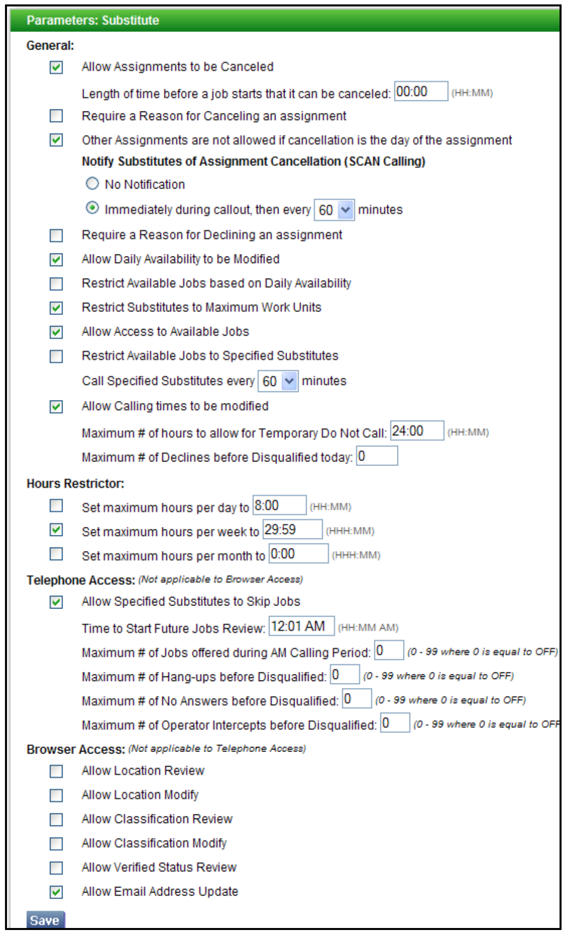


The following table describes each parameter and provides information on how SmartFind*Express* operates if the parameter is enabled (box checked) or disabled (box unchecked). It also provides information on the proper values to enter for the optimal functioning of your system.

PARAMETER	DESCRIPTION/ACTION
General:	
Can Cancel an Absence up until__ Before it Starts	Employees can cancel an absence up until the time indicated by this parameter. It is entered as hours and minutes before the job starts. When this parameter is met, the employee cannot cancel a job and must call the system operator or administrator. If this field is left blank, or contains zeros, jobs can be cancelled up until the start time of the job.
Telephone Access: (Not applicable to Browser Access)	
Play Substitute ID during Job Review	This parameter determines if the substitute's Access ID is played to the absentee employee when the employee calls the system to hear who is assigned to their absences. If the box is checked, employees will hear the substitute's ID.
Browser Access: (Not applicable to Telephone Access)	
View Substitute Telephone Number	If this parameter is checked, telephone numbers will display on the Substitute Name Lookup list on the Job Creation screen in the Employee module. If this parameter is not checked, telephone numbers will not display. This feature can be used to protect the privacy and confidentiality of the substitute's telephone number.
Allow Specifying a Substitute by Name	This parameter controls whether the *Name Lookup* button is visible to employees. If the *Name Lookup* button is not visible and substitutes can be specified, their Access ID must be entered.
View Reason Balances	This parameter controls whether an employee can view their reason balances on the web. If enabled, a Reasons Balances tab will display in the Employee module.

Substitute Parameters

The Parameters: Substitute page collects information on global parameter settings for substitutes. After entering substitute parameters, click *Save.*



The following table describes each parameter and provides information on how SmartFind*Express* operates if the parameter is enabled (box checked) or disabled (box unchecked). It also provides information on the proper values to enter for the optimal functioning of your system.

PARAMETER	DESCRIPTION/ACTION
General:	
Allow Assignments to be Cancelled	This parameter determines if a substitute may call in and cancel their assignment to a job, provided the job has not yet started. Consequences of canceling an assignment depend on other parameters. For example, if *Ask the Reason for Canceling* is enabled, the substitute is prompted to provide a reason for the cancellation for data collection purposes. Also, if *Other Assignments are not allowed if cancellation is the day of the assignment* is enabled, the substitute will not be able to work any other job on that day if the assignment was cancelled on the day of the job. Once a job has started, only the system operator can cancel the assignment.

Parameter	Description/Action
Length of Time Before a Job Starts that it can be Cancelled	Substitutes can cancel a job up until the time indicated by this parameter. Once this time is reached, the substitute cannot cancel a job. If no value is entered, or the field contains zeros, jobs can be cancelled up until the start time of the job. The open portion of multiple-day jobs can also be cancelled when some of the job days have already been finished if this parameter is set to *00:00*.
Require a Reason for Canceling an Assignment	This parameter requires substitutes to enter a valid reason when they access the system to cancel an assignment to a job. A check in this box enables this feature. These reasons are used for data collection purposes. The menu of possible Decline/Cancellation reasons must also be set up if this feature is enabled.
Other Assignments are not Allowed if Cancellation is the Day of the Assignment	This parameter determines if the system will allow a substitute to cancel an assignment on the day of the job and then later accept another job on the same day. A check in this box indicates that a substitute who cancels a job assignment should be automatically disqualified for all other jobs that day. A substitute who cancels a multiple-day job assignment on a day of the job is disqualified from being offered other jobs for only the day that they cancelled. If this field is not checked, a substitute who cancels a job assignment can accept another job for that day. **Note:** This parameter controls *the system* calling and offering assignments; it does not prevent the substitute from being *assigned by an administrator* or from being *specified or pre-arranged* for an assignment on that day.
Notify Substitutes of Assignment Cancellation (SCAN [Substitute Cancellation Notification] calling)	When a job assignment is cancelled, the system will ask the person canceling to notify or not notify the substitute to advise them of the change. Assignment cancellations can occur if the job is reassigned to another substitute, or if the entire job is cancelled. The notification option provides for SCAN calls to be placed immediately during callout times, with the system placing subsequent calls every 30, 45 or 60 minutes. If a job is cancelled during non-callout times, the SCAN call is made at start of callout. If the “No Notification” option is chosen, the system will not place a call to the substitute to advise them of the assignment cancellation.
Require a Reason for Declining an Assignment	This parameter requires substitutes to enter a valid reason when they decline a job. A check in this box enables the feature. These reasons are used for data collection purposes. The system does not use decline reasons when determining which substitute to call for a job. The menu of possible Decline/Cancellation reasons must also be set up if this feature is enabled.
Allow Daily Availability to be Modified	This parameter determines if substitutes may hear, view or modify the contents of the Daily Availability fields in their profile. If this parameter is enabled, substitutes can indicate the days and times they can work. If this parameter is not checked, substitutes cannot maintain this information.
Restrict Available Jobs based on Daily Availability	This parameter controls whether job shopping should consider the daily availability of the substitute while filtering jobs for the substitute on the web/IVR/mobile. If unchecked, job shopping does not restrict based on the substitute Schedule.

Parameter	Description/Action
Restrict Substitutes to Maximum Work Units	This parameter limits each substitute to working no more than the number of work units indicated in the *Maximum Number of Work Units* field in their profile. Each substitute may have a separate limit. A value of zero (0) in this field on the substitute profile indicates that this parameter does not apply to the substitute. In this case, the substitute will not be restricted from jobs due to work units. A check in this box directs the system to use the *Maximum Number of Work Units* field in the profile. If this box is not checked, this feature is disabled regardless of what is entered on the profile. When a substitute has worked the allowable work units, the system will not offer any more jobs to that substitute. If the duration of a particular job would cause the substitute to exceed (not merely to reach) their limit, it will not offer that job to the substitute and will not allow the person who reports such an absence to request that substitute. Work units can be manually assigned on the Optional Information screen or can be assigned to all substitutes via the *Set Maximum Work Units* option on the Tools menu. This option is typically performed each year, before the start of the school year.
Allow Access to Available Jobs	This parameter determines if substitutes who access the system can hear or view available jobs. The list of available jobs changes as other substitutes accept assignments and as jobs are being created. Jobs can be heard or viewed by substitutes if: • They are Active, Registered, Not Expired and Available for new jobs • They are specified for the job • They are on the same list and level that the telephone (IVR) is currently calling. **Note:** *A substitute's daily availability or periods of unavailability are not considered when the substitute checks for open jobs.*
Restrict Available Jobs to Specified Substitutes	This parameter allows jobs to be offered or viewed only by substitutes who are specified or requested for the job. This parameter applies only when substitutes call or log into the system. If this box is checked, only jobs they are specified will be displayed or heard.
Call Specified Substitutes Every__Minutes	This parameter enables you to choose how often the system makes calls to specified substitutes to offer them jobs. The frequency of these calls can be set to every 30, 45, or 60 minutes. Job offer calls to specified substitutes are made immediately when the specification occurs during callout times. If a substitute is specified during non-callout times, the specified offer call is made at start of callout.
Allow Calling times to be Modified	This parameter indicates if substitutes can modify the times they do not want to be called by the system for jobs. If enabled, fields that allow the substitute to specify the times that they do not want to be called will be visible on the Schedule screen of their profile.

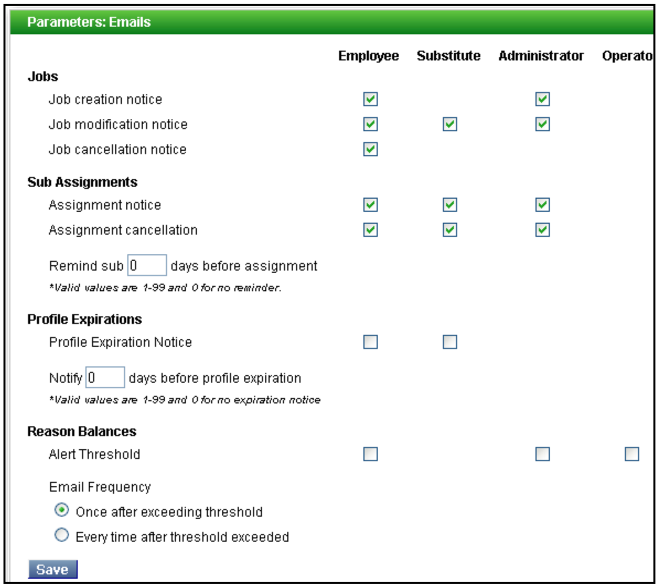
Parameter	**Description/Action**
Maximum # of Hours to Allow for Temporary Do Not Call	This parameter allows substitutes to specify a temporary *Do Not Call* period. When using the temporary *Do Not C*all option, a substitute can enter a specific time sooner than this timeframe for calls to resume. The default time is entered in this field in hours. Entering a zero value in this field deactivates this feature and does not allow the substitute to set a *Do Not Call* period. However, when a *Do Not Call* period is set, substitutes can hear and view job offers. The maximum time that can be entered 24 hours. It is recommended that the maximum number of hours be only long enough to prevent the system from calling a substitute again during a single callout period.
Maximum # of Declines before Disqualified Today	This parameter determines the maximum number of times (from 1 to 99) that substitutes can decline jobs during morning callout. When a substitute declines the number of job offers indicated by this parameter during morning callout, that substitute is disqualified for the remainder of the callout for that day's jobs. To disable this feature, enter zero. If zero is entered, a substitute will not be disqualified based on this parameter. Substitutes can decline jobs in the browser and on the telephone. It is recommended that a range between three and five be entered. In most cases, substitutes decline during morning callout due to illness or other obligations rather than because they are not interested in working a particular job that day. Therefore, a low number is adequate to prevent calls to substitutes who are unable or do not want to work that day. This prevents blocking a substitute who does wish to work that day, but is being selective about which job to accept. When reopening hard to fill jobs, you may increase this number and the settings for maximum hang-ups and no answers to give the system additional opportunities to find substitutes for those positions. Increasing the number by two (2) is recommended in this situation. After callout has ended, reset the numbers to their normal settings.
Hours Restrictor:	
Set maximum hours per day to:	This parameter specifies the maximum number of hours per day that a substitute can work. A substitute can no longer be assigned to jobs once the maximum number of work hours for the day is reached. Exemptions from work hour restrictions can be set on individual substitute profiles.
Set maximum hours per week to:	This parameter specifies the maximum number of hours per week that a substitute can work. A substitute can no longer be assigned to jobs once the maximum number of work hours for the week is reached. Exemptions from work hour restrictions can be set on individual substitute profiles.
Set maximum hours per month to:	This parameter specifies the maximum number of hours per month that a substitute can work. A substitute can no longer be assigned to jobs once the maximum number of work hours for the month is reached. Exemptions from work hour restrictions can be set on individual substitute profiles.

PARAMETER	DESCRIPTION/ACTION
Telephone Access: (Not applicable to Browser Access)	
Allow Specified Substitutes to Skip Jobs	This parameter determines if substitutes who are specified for a job can bypass accepting or declining the job. If this parameter is unchecked, a substitute must decide upon hearing only the first job whether to accept or decline the job. A check in this box allows substitutes specified for jobs to skip to hear other job offers without making a decision on the skipped job(s).
Time to Start Future Jobs Review	**NOTE:** *This option is also applicable to Browser access.* On the IVR and Web, when the time entered for this parameter is reached, the system begins to offer/display open jobs for a future date if the substitute qualifies for the job. When substitutes review open jobs on the Web *prior* to the time specified in this parameter, the system displays jobs for the current day only, if they qualify for the job *and* have the job location in their profile. (For specified substitutes, location does not matter.) **NOTE**: *If a substitute qualifies for a job through the General Classification or Any Substitute lists, they will not see the job displayed on the web if they do not have the job location in their profile; however, they may still be called for the job during callout.* On the Substitute web page for Available Jobs, the “Search From” and “Search To” are both set to today’s date and cannot be changed prior to the time entered for this parameter is reached. The “Search From” field defaults to the current date and “Search To” defaults to tomorrow’s date with both dates editable after the parameter time is reached. It is recommended that a time close to the completion of morning callout be entered to minimize the use of the telephone lines during peak calling times.
Maximum # of Jobs Offered During AM Calling Period *(0-99 where 0 is equal to OFF)*	This parameter determines the maximum number of jobs the system can offer when a substitute calls the system during morning callout. This parameter prevents incoming lines, needed to report absences and vacancies for that day, from being monopolized by substitutes. This number does not guarantee that the substitute will be offered the maximum number of jobs. All jobs played will be for the current day unless it is past the time entered in the “*Time to Start Future Jobs Review”* field. If the value entered is zero, the system can play all open jobs that have reached or passed a list that contains the substitute. Open jobs are also offered to substitutes in the browser, using the same method with no limitation on the number of jobs that can be viewed.

PARAMETER	DESCRIPTION/ACTION
Maximum # of Hang-ups before Disqualified *(0-99 where 0 is equal to OFF)*	This parameter determines the maximum number of times that calls to a substitute can result in the disposition of “Hang-up” during morning callout. A “hang-up” occurs when the telephone line is answered, a PIN is entered, and a hang-up is detected before an action is recorded. When calls to a substitute reach the number entered in this field during morning callout, the substitute is disqualified for the remainder of that day’s callout for jobs. To disable this feature, enter zero. If zero is entered, the system will not disqualify substitutes based on this parameter.
Maximum # of No Answers before Disqualified *(0-99 where 0 is equal to OFF)*	This parameter determines the maximum number of times that calls to a substitute can result in the disposition of “No Answer” during morning callout. When calls to a substitute result in the maximum number of “No Answers” during morning callout, the substitute is disqualified for the remainder of that day’s callout for jobs. To disable this feature, enter zero. If zero is entered, the system will not disqualify substitutes based on this parameter.
Maximum # of Operator Intercepts before Disqualified *(0-99 where 0 is equal to OFF)*	If the IVR detects an operator intercept, the number indicated by this parameter is the number of times the call will be re-tried before the substitute is disqualified for the remainder of the callout for the current day. This parameter prevents continuous attempts to contact substitutes with an invalid or out of service phone number. The count for the substitute is reset for the next morning callout. To disable this feature, enter zero. If zero is entered, the system will not disqualify substitutes based on this parameter.
Browser Access (Not applicable to Telephone Access)	
Allow Location Review	This parameter controls whether substitutes can view the locations in their profile. If checked, a Locations screen will be included in the substitute’s profile. Viewing locations allows substitutes to confirm that their locations were correctly entered into the system.
Allow Location Modify	This parameter controls whether substitutes can modify locations in their profile. If checked, substitutes can add new locations to their profile and delete locations from the Location List in their profile.
Allow Classification Review	This parameter controls whether substitutes can view the classifications in their profile. If checked, a Classifications screen will be included in the substitute’s profile. Viewing classifications allows substitutes to confirm that their classifications were correctly entered into the system.
Allow Classification Modify	This parameter controls whether substitutes can modify classifications in their profile. If checked, substitutes can add new classifications to their profile and delete classifications from the Classifications List in their profile.
Allow Verified Status Review	When the “Allow Verified Status Review” parameter is enabled, substitutes are able to view on the web whether their finished jobs are in a “Verified” state. An indicator will display on the substitute’s Review Assignments page for jobs that are in a “Verified” state.
Allow Email Address Update	This parameter controls whether a substitute can modify the email address in their profile. If checked, substitutes can change the email address in their profile from the Profile, Update Email page.

Email Parameters

The system can be configured to automatically send emails to employees, substitutes, administrators and operators to provide notification on jobs, substitute assignments, profile expirations, absence approval requests and reason balance threshold alerts.



Parameter	Description
Jobs	Employee can receive automatic emails when jobs are created, modified, or cancelled. Location administrators can receive emails when jobs are created and/or modified for their location.
Substitute Assignments	Administrators and employees can receive email notification when a substitute accepts an assignment and also when a substitute cancels the job after accepting. Substitutes can receive automatic emails for job assignments, assignment cancellations, and assignment reminders. The "*Remind sub__days before assignment*" option is used to set up assignment reminders. A value between 1 and 99 must be entered for the field to be active. Days are based on the Gregorian calendar, not the school calendar or business days. For multi-day jobs, the first date of the assignment is used as the basis for sending the email reminder. Emails contain data about the event, such as job number, substitute name, job location, classification and job start and end dates.
Profile Expirations	Administrators can generate profile expiration alerts to notify employees and substitutes of pending profile expirations. If a person happens to have both roles and if both profiles expire on the same day, separate emails are sent for each role to that person.

Parameter	Description
Absence Approval	Employees and administrators can receive automatic emails on the status of absence approval requests in the system. An email can be sent to the employee and administrator when an absence approval request is submitted in the system. Employees can also receive email notification when an absence approval request passes an approval level (partially approved) and when a request is approved or denied.
Reason Balances	Administrators can configure reason balance threshold alerts to automatically send notifications to employees, administrators and operators when a reason's usage threshold is reached/exceeded. The email alerts can be sent once after the threshold is exceeded, or each time the threshold is exceeded. The email notification is sent to the location administrators and operators.

Telephone Menu

The Telephone menu provides access to the following Telephone features:

- Telephone Lines
- Telephone Monitor
- Telephone Voicing

Feature	Description
Telephone Lines	Configure incoming and outgoing lines and set daily callout times, dialing prefixes and shutdown periods for the telephone lines.
Telephone Monitor	Monitor activity on all of the configured telephone lines in real-time.
Telephone Voicing	Record voicings for codes that must be played over the telephone

Telephone Line Control

Telephone line control plays an integral role in the functionality of the system. It allows you to determine when calls are made to substitutes.

Each telephone line is set up during implementation of your system as incoming or outgoing. This setup determines which telephone lines are available for absence reporting and substitute callin, versus the number of telephone lines dedicated to calling substitutes for jobs.

An *incoming* line is a line used to receive incoming phone calls for the reporting of absences or for substitutes to search for open jobs, review assignments or modify profiles. The telephone company configures these lines in a "*hunt group.*" This means that only one telephone number is distributed to users regardless of how many phone lines are actually used. When that line is busy, the incoming call rolls over to the next available phone line. A busy signal is heard only when all incoming lines are in use.

An *outgoing* line is a line used to place outgoing calls. Calls are made at times designated for that day of the week. Outgoing lines are not setup in a hunt group with themselves or with the incoming lines. Also, telephone numbers for outgoing lines should not be distributed to users.

While these numbers may appear on caller-ID, users will not be able to call the system by dialing the number for a line designated as outgoing. This activity will be recorded as an error in the activity log.

A line can also have a designation of both *incoming and outgoing*. These lines will be used to accept calls or make calls. Having a certain portion of the lines with this status increases the line usage.

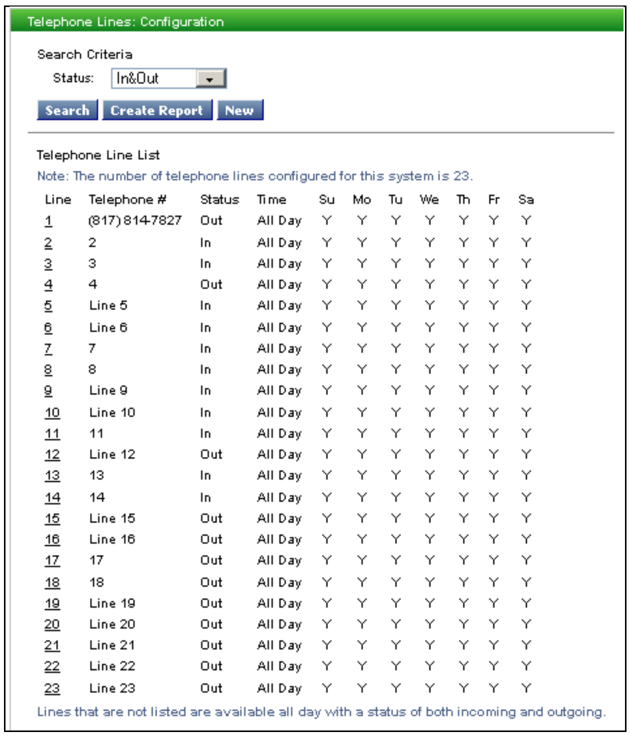
Telephone line control is initially configured with assistance from your eSchool Solutions representative. Do not attempt to add phone lines and or change the line type of existing phone lines. Changing phone lines from incoming to outgoing and vice versa requires collaboration with the local phone company to manage the hunt group. Contact Client Services before making any changes to the phone line control settings.

Telephone Lines Configuration

The Telephone Lines Configuration page allows you to display configuration settings for each phone line in your system and add, modify, or delete telephone lines. Telephone Lines –Configuration reports can also be generated. Lines can be configured as incoming, outgoing, incoming and outgoing, all incoming, all outgoing and shutdown.

A search on all incoming lines will display both incoming phone lines and incoming and outgoing lines. A search for all outgoing lines will display all outgoing lines and incoming and outgoing phone lines

To display specific line information, select the *line* type from the Status pull-down menu and click *Search.* To obtain a status on all lines in your system, leave the *Status* field blank and click *Search*. The Telephone Line list for your system is displayed.


Telephone Lines: Configuration

Search Criteria
Status: In&Out
Search | Create Report | New

Telephone Line List
Note: The number of telephone lines configured for this system is 23.

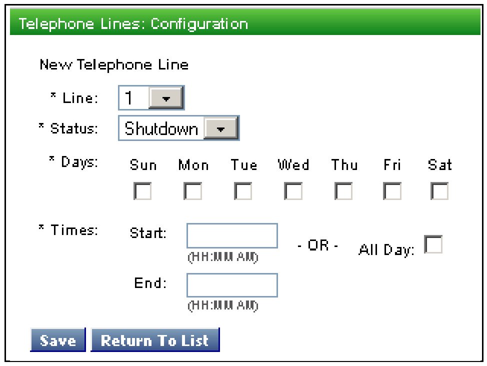
Line	Telephone #	Status	Time	Su	Mo	Tu	We	Th	Fr	Sa
1	(817) 814-7827	Out	All Day	Y	Y	Y	Y	Y	Y	Y
2	2	In	All Day	Y	Y	Y	Y	Y	Y	Y
3	3	In	All Day	Y	Y	Y	Y	Y	Y	Y
4	4	Out	All Day	Y	Y	Y	Y	Y	Y	Y
5	Line 5	In	All Day	Y	Y	Y	Y	Y	Y	Y
6	Line 6	In	All Day	Y	Y	Y	Y	Y	Y	Y
7	7	In	All Day	Y	Y	Y	Y	Y	Y	Y
8	8	In	All Day	Y	Y	Y	Y	Y	Y	Y
9	Line 9	In	All Day	Y	Y	Y	Y	Y	Y	Y
10	Line 10	In	All Day	Y	Y	Y	Y	Y	Y	Y
11	11	In	All Day	Y	Y	Y	Y	Y	Y	Y
12	Line 12	Out	All Day	Y	Y	Y	Y	Y	Y	Y
13	13	In	All Day	Y	Y	Y	Y	Y	Y	Y
14	14	In	All Day	Y	Y	Y	Y	Y	Y	Y
15	Line 15	Out	All Day	Y	Y	Y	Y	Y	Y	Y
16	Line 16	Out	All Day	Y	Y	Y	Y	Y	Y	Y
17	17	Out	All Day	Y	Y	Y	Y	Y	Y	Y
18	18	Out	All Day	Y	Y	Y	Y	Y	Y	Y
19	Line 19	Out	All Day	Y	Y	Y	Y	Y	Y	Y
20	Line 20	Out	All Day	Y	Y	Y	Y	Y	Y	Y
21	Line 21	Out	All Day	Y	Y	Y	Y	Y	Y	Y
22	Line 22	Out	All Day	Y	Y	Y	Y	Y	Y	Y
23	Line 23	Out	All Day	Y	Y	Y	Y	Y	Y	Y

Lines that are not listed are available all day with a status of both incoming and outgoing.

The telephone list displays information on the total number of lines configured for your system, the line number, telephone number, line status, and line availability. Telephone lines that are not configured on this page are still active and will be considered as incoming and outgoing lines.

Adding Telephone Lines

To configure new telephone lines for your system, click *New*. The New Telephone Line screen is displayed. Enter the settings for the new telephone line and click *Save*.



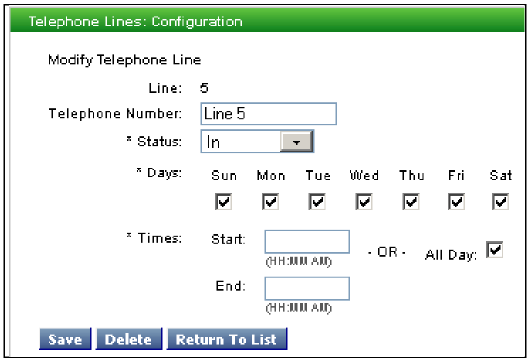
Field Name	Description
Line	The pull-down menu lists the lines that are available in your system.
Status	Select the line status. The values are incoming, outgoing, both incoming and outgoing and shutdown.
Telephone No	Enter the telephone number associated with this line. Telephone numbers can include special characters such as ( ) - . This number is used for data collection purpose only.
Days	Select the days of the week to indicate when this line is available for calls. **Note**: *The line cannot have overlapping days and times.*
Times	Either *All Day* or a time range must be present. Entering *All Day* indicates that the line is available all day for the designated days. Each day of the week can have a different start and end calling time. **Note**: *The line cannot have overlapping days and times.*

A line can have multiple statuses on the same day. For example: A line can be incoming from 5:00 am until 6:00pm, and incoming and outgoing from 6:01 pm until 11:00 pm. When lines have multiple statuses, remember that the hunt group must include all of your incoming lines.

Modifying/Deleting Telephone Lines

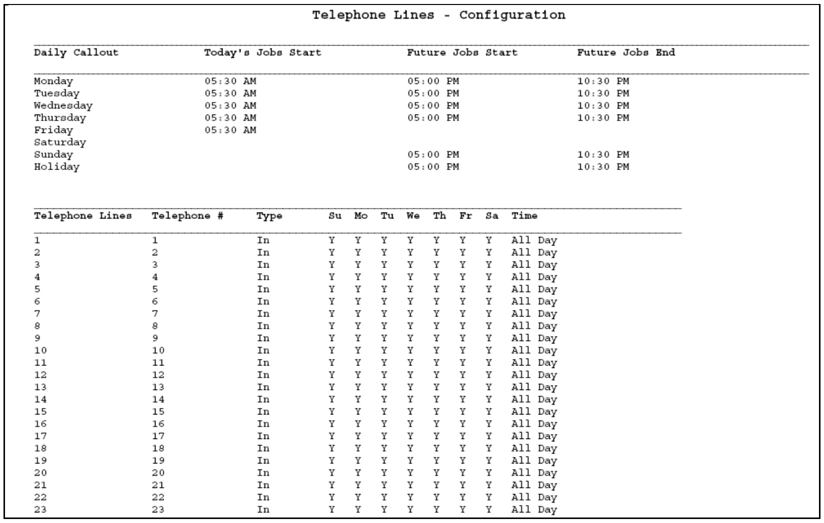
To make changes to the settings for a line, or to delete a line from your system, click on the **Line** link on the Telephone list. The Modify Telephone Line screen is displayed. You can modify the telephone line number, status, or line availability information.

To delete a line from your system, display the desired telephone line on the Modify Telephone Line screen and then click *Delete*.



Creating Telephone Line Reports

You can create a telephone line configuration report by clicking *Create Report*. The report displays daily callout times for morning and evening callout, telephone line configuration information for all lines, and lists the callout phone prefixes. The report is automatically displayed in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report.



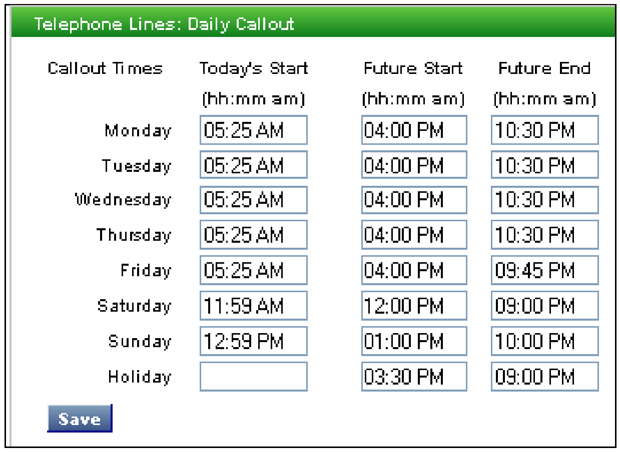
Telephone Lines - Configuration

Daily Callout	Today's Jobs Start	Future Jobs Start	Future Jobs End
Monday	05:30 AM	05:00 PM	10:30 PM
Tuesday	05:30 AM	05:00 PM	10:30 PM
Wednesday	05:30 AM	05:00 PM	10:30 PM
Thursday	05:30 AM	05:00 PM	10:30 PM
Friday	05:30 AM		
Saturday			
Sunday		05:00 PM	10:30 PM
Holiday		05:00 PM	10:30 PM

Telephone Lines	Telephone #	Type	Su	Mo	Tu	We	Th	Fr	Sa	Time
1	1	In	Y	Y	Y	Y	Y	Y	Y	All Day
2	2	In	Y	Y	Y	Y	Y	Y	Y	All Day
3	3	In	Y	Y	Y	Y	Y	Y	Y	All Day
4	4	In	Y	Y	Y	Y	Y	Y	Y	All Day
5	5	In	Y	Y	Y	Y	Y	Y	Y	All Day
6	6	In	Y	Y	Y	Y	Y	Y	Y	All Day
7	7	In	Y	Y	Y	Y	Y	Y	Y	All Day
8	8	In	Y	Y	Y	Y	Y	Y	Y	All Day
9	9	In	Y	Y	Y	Y	Y	Y	Y	All Day
10	10	In	Y	Y	Y	Y	Y	Y	Y	All Day
11	11	In	Y	Y	Y	Y	Y	Y	Y	All Day
12	12	In	Y	Y	Y	Y	Y	Y	Y	All Day
13	13	In	Y	Y	Y	Y	Y	Y	Y	All Day
14	14	In	Y	Y	Y	Y	Y	Y	Y	All Day
15	15	In	Y	Y	Y	Y	Y	Y	Y	All Day
16	16	In	Y	Y	Y	Y	Y	Y	Y	All Day
17	17	In	Y	Y	Y	Y	Y	Y	Y	All Day
18	18	In	Y	Y	Y	Y	Y	Y	Y	All Day
19	19	In	Y	Y	Y	Y	Y	Y	Y	All Day
20	20	In	Y	Y	Y	Y	Y	Y	Y	All Day
21	21	In	Y	Y	Y	Y	Y	Y	Y	All Day
22	22	In	Y	Y	Y	Y	Y	Y	Y	All Day
23	23	In	Y	Y	Y	Y	Y	Y	Y	All Day

Daily Callout

This screen controls when the system makes calls to substitutes. Each day of the week has its own time to begin and end calling. *Today's Start* displays the times for morning callout for jobs for the current day. *Future Start* and *Future End* display the times for evening callout.



Morning callout (also called "Today's callout") happens any time between the time entered in the "*Today's Start*" field and the beginning of evening callout. There is not a designated stopping time for morning callout. Instead, calls for today's jobs stop when a certain percentage of each job has completed. This percent amount is entered on the "Parameters - General tab. The assumption is that once that time has passed, the job has been filled by in-house personnel, a substitute cannot be paid for the remaining time only, or it is not worthwhile to have a substitute accept and arrive at that time or later due to travel.

Future Callout fields are for evening callout. There is a designated start and end time for this callout period. The system makes calls during this time for jobs for tomorrow or the future. The number of days prior to a job that the system can look for a substitute is controlled by options on the Parameters - Jobs tab.

Holidays also have a callout time. Times for holidays are for evenings only. Because jobs cannot be reported for holidays, morning callout is not needed. A time can be placed in the "*Today Start*" field, but it will not be used.

The system looks at the calendar associated with the job to determine whether callout should occur. Only days that are designated as holidays on the calendar use holiday callout times.

Note: *When there are several holidays in a row, calls are made each night whether the following day is a holiday, weekend, or workday.*

Note: *The "Start Callout Min" field on the New Classification screen can also control when calls are made to substitutes. If "0" is entered, callout for the jobs with that classification will occur according to the settings in the phone line control. If any other number is entered, the system will begin to call substitutes on the day of the job, for jobs with that classification that number of minutes prior to the start of the job, regardless of callout times established for that day of the week.*

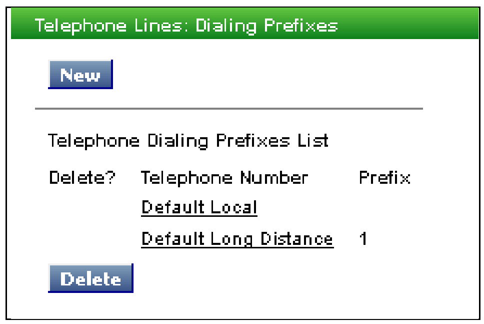
Note: *System default callout times can be changed on the Location Profile – Times tab.*

After entering the times desired for each day and for holidays, click *Save* in order to save your changes.

Dialing Prefixes

This screen allows you to display, add, modify, and delete callout prefixes. When you access this screen, the prefixes stored in the database are displayed. The default prefixes are displayed first and then the remaining prefixes sorted by telephone number.

Default prefixes used when dialing on outgoing telephone lines are entered into the system as callout phone prefixes. If the telephone lines are going through a telephone switch (ex. PBX) and a number has to be dialed to access an outside line, that number is entered on this screen. Also, if you have access to special long distance or extended area calling telephone lines that require a number sequence, you can designate in the sequence what should be used for those area codes and exchanges that do not use the default prefixes.



The *Default Local* prefix is the number that is dialed before all local telephone numbers that do not match other entries in the callout phone prefix list. It is the default prefix for all local numbers. If there are no matching entries in the callout phone prefix list for a local 7 or 10-digit number, but there is a dialing prefix in “Default Local,” this prefix will be used when dialing. For example: 9,
The comma shown after the 9 indicates a 2-second pause before dialing the rest of the number.

The *Default Long Distance* prefix is the number that is dialed before all long distance telephone numbers that do not match other entries in the callout phone prefix list. It is the prefix used as the default for 11-digit numbers. If there are no matching entries in the list for the 11-digit numbers being called, but there is a prefix in “Default Long Distance,” this prefix will be used when dialing.
For example: 9, 1: The comma indicates a 2-second pause before dialing the rest of the number.

Entries in the prefix list can consist of a combination of a long distance value (1), area code, and calling area (first 3 digits of the 7-digit phone number), indicating 7, 10- or 11-digit dialing.

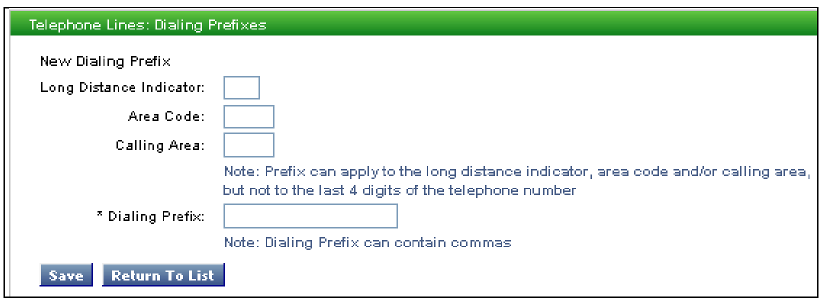
For example, if you live in Dallas (972 area code) and want to dial a Fort Worth (817) area code, to avoid long distance charges or take advantage of extended area calling, designate (817) area codes as needing to dial “8,” before all numbers in the (817) area code.

The system selects which prefix to use in the following sequence:

If the callback number has the following:	**This sequence is used to determine which prefix to use:**
A long distance value of 1 (indicating 11-digit dialing)	1+ Area Code and Calling area match, 1+ Area Code match, Default Long Distance
An area code and no long distance value (indicating 10-digit dialing)	Area Code + Calling area match, Area Code match, Default Local
A calling area and no long distance value or area code (indicating 7-digit dialing)	Calling area match, Default Local

Adding New Prefixes

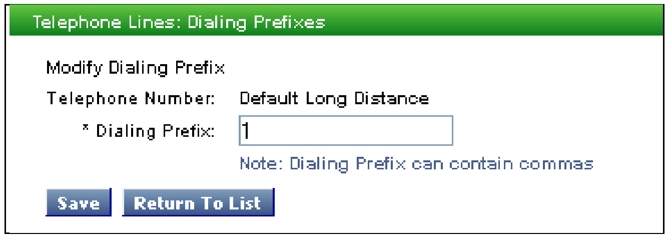
To add a dialing prefix, click *New*. The New Dialing Prefix screen is displayed. Enter the information on the new prefix and click *Save* to add the prefix to the list.



Field Name	**Description**
Long Distance Indicator	This number can only be “1.”
Area Code	The area code must be three digits.
Calling Area	Enter the numbers against which the callback number will be matched in order to select the appropriate prefix. The calling area must be three digits.
Dialing Prefix	Enter the prefix that should be dialed before dialing the telephone number. Up to eleven characters can be entered in this field. Use a comma to indicate a pause in dialing the rest of the numbers. You may enter multiple commas to indicate a long pause. Pauses are sometimes needed to allow time for the system to connect and obtain a dial tone before dialing the rest of the numbers. **Note**: *A comma indicates a 2-second pause.* **Note:** *When not using the “Include Home Area Code” feature in the system parameters, and there is a dialing prefix for the home area code, the dialing prefix is used even though the area code is not dialed.*

Modifying/Deleting Prefixes

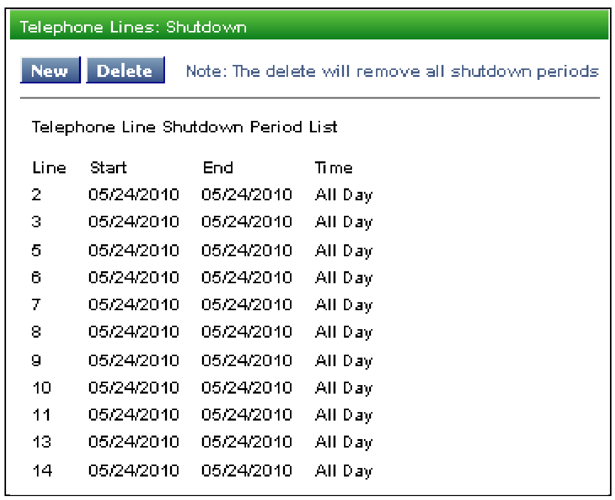
From the Telephone Dialing Prefixes list, click on the **Telephone Number** link of the prefix you want to modify. The Modify Dialing Prefix screen is displayed. Update the *Dialing Prefix* field and then click *Save*.



From the Telephone Dialing Prefixes list, click in the deletion box of the prefix you want to delete and then click *Delete*. The default local and default long distance entries cannot be deleted. If the prefix is not needed, you can remove the data from the *prefix* field and save the changes.

Shutdown

This screen allows you to set up a temporary shutdown period. This screen displays the current and future shutdown periods by line number.



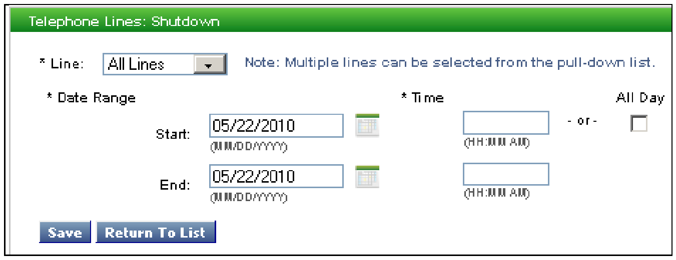
Line	Start	End	Time
2	05/24/2010	05/24/2010	All Day
3	05/24/2010	05/24/2010	All Day
5	05/24/2010	05/24/2010	All Day
6	05/24/2010	05/24/2010	All Day
7	05/24/2010	05/24/2010	All Day
8	05/24/2010	05/24/2010	All Day
9	05/24/2010	05/24/2010	All Day
10	05/24/2010	05/24/2010	All Day
11	05/24/2010	05/24/2010	All Day
13	05/24/2010	05/24/2010	All Day
14	05/24/2010	05/24/2010	All Day

During a shutdown period, telephone lines are shutdown by selecting the line statuses. The system will not answer incoming calls to a "shut down" phone line and will not use outgoing lines that are shut down during callout, regardless of the callout times entered for that day. A possible use of this feature is for school closure, such as inclement weather or a union strike.

Note: *In most normal operations, there are no shutdown periods.*

Adding Shutdown Periods

Click *New* to establish a shutdown period. Enter the information on the phone line(s) to be shutdown and click *Save* to save the shutdown period for the selected line.



Field Name	Description
Line	Select the line(s) to be shutdown. Multiple lines can be selected from the pull-down list.
Date Range	Enter the start and end dates for the shutdown period.
Time	Select either *All Day* or enter the start and end time for the shutdown period.

Telephone Monitor

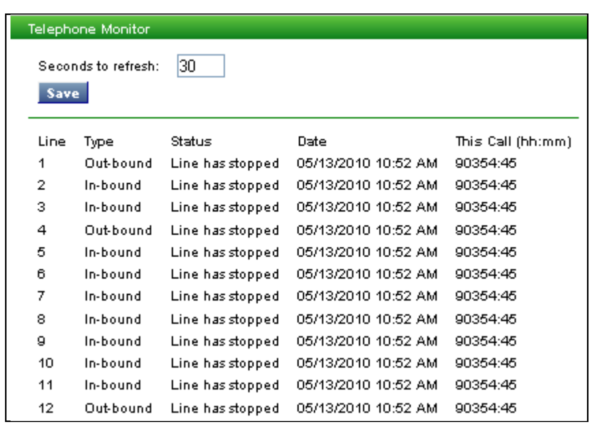
This screen is a real-time display of the activity on all of the telephone lines configured for your system. It shows the line number, line type, line status, current date/time, and length of call. When an outbound call is made, the name, access ID and PIN number of the substitute who was called is shown in the *Status* column. For incoming calls, the following message displays, “answering an incoming call.”

If a problem existed with the call processor, it could be detected by viewing date and time information. If the current date and time were not displaying, that could indicate a problem with the lines.

The number of *seconds to refresh* the screen can be changed from the default setting of five seconds by entering a new number and clicking *Save*.

Each line configured on the Telephone Lines screen appears on this screen. The lines are listed in line number order. The line types for each phone line are displayed on the screen. The various line types you will see are: In-bound, Out-bound, and Shutdown. Refer to the “Telephone Lines” chapter for more detailed information on line types.

Information on the screen will change or be refreshed as activity on the IVR occurs.


Telephone Monitor

Seconds to refresh: 30

Save

Line	Type	Status	Date	This Call (hh:mm)
1	Out-bound	Line has stopped	05/13/2010 10:52 AM	90354:45
2	In-bound	Line has stopped	05/13/2010 10:52 AM	90354:45
3	In-bound	Line has stopped	05/13/2010 10:52 AM	90354:45
4	Out-bound	Line has stopped	05/13/2010 10:52 AM	90354:45
5	In-bound	Line has stopped	05/13/2010 10:52 AM	90354:45
6	In-bound	Line has stopped	05/13/2010 10:52 AM	90354:45
7	In-bound	Line has stopped	05/13/2010 10:52 AM	90354:45
8	In-bound	Line has stopped	05/13/2010 10:52 AM	90354:45
9	In-bound	Line has stopped	05/13/2010 10:52 AM	90354:45
10	In-bound	Line has stopped	05/13/2010 10:52 AM	90354:45
11	In-bound	Line has stopped	05/13/2010 10:52 AM	90354:45
12	Out-bound	Line has stopped	05/13/2010 10:52 AM	90354:45

Telephone Voicing

You can record a voicing at your site for codes that must be played over the telephone. For example, new locations, classifications, calendars, and reasons are voiced after they are created. Although the system menus are already voiced, certain voicing IDs such as the “Welcome message,” can be customized and re-voiced. Items that can be customized have the *Can Modify* flag set to “*Yes*.” There are some voicing IDs that cannot be modified.

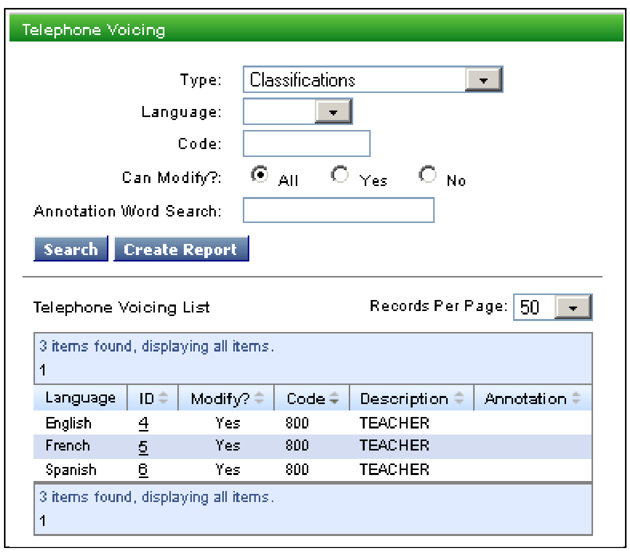
A voicing ID number is automatically generated by the system for each item and is entered on the telephone.

Using the Telephone Voicing Screen

Use this screen to search for all voicing IDs in the database. When more than one language is being used by a district, the Language field will have a drop-down box of selectable languages.

To search for voicing IDs, enter the desired search criteria and click *Search*. The search results are displayed on the Telephone Voicing list. The listing can be sorted by the column headings by clicking on the up/down arrow in that column.

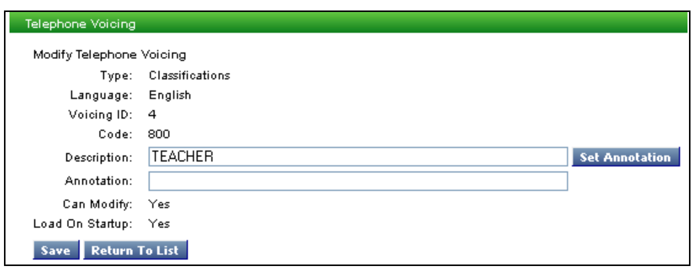
If a Voicing ID is set up as modifiable, the annotation and/or description can be modified, and the recording can be voiced or re-voiced. It is recommended that the annotation reflect an accurate representation of the telephone voicing. You can also print a report containing the voicing IDs and annotations.



Field Name	Description
Type	Select a *type* to narrow the list to only specific voicing IDs. The types are: Calendar, Locations, Classifications, Absence/Vacancy Reasons, Decline/Cancel Reasons, System Menu, and System Utility. If a type is not specified, all voicing IDs in the database are displayed on the list.
Language	Select the language for the Telephone Voicing list. The choices are English, Spanish, and French. If a language is not selected, all language voicing IDs are displayed.
Code	To search by code, enter the code assigned to the item. For example, for locations, enter the code for locations; for classifications, enter the code for classifications.
Can Modify?	Select *All*, *Yes*, or *No* to indicate if the search should include only Voicing IDs that can be modified, only Voicing IDs that cannot be modified, or both. The *Can Modify* option refers to whether or not the system operator can make changes to voicing ID descriptions. Some system prompts are not modifiable by the system operator, for example, the prompt that plays "Invalid." Other prompts are modifiable, including the prompts for locations, reasons for absences, and welcome messages.
Annotation Word Search	To search for a voicing ID by its annotation, enter the wording of the item and click *Search*. This field is case-sensitive. If an annotation contains this value, it is displayed. The annotation should be an accurate reflection of what is being voiced.

Modifying Voicing IDs

To modify a description and/or annotation, click the desired **ID** link. The Modify Telephone Voicing screen is displayed. Make your updates to the description and/or annotation. Click ***Set Annotation*** to automatically have the *Description* information copied to the *Annotation* field. Click *Save* to update the voicing ID in the database.



Note: A checkmark is displayed in the "*Can Modify" box if updates can be made to any fields. The Can Modify and Load On Startup fields are not updateable.*

Creating Voicing ID Reports

Click *Create Report* on the Telephone Voicing screen to print a report of voicing IDs for the search criteria selected. The report automatically displays in the Adobe Acrobat reader. Use the Adobe toolbar to print or save the report. A sample report is shown below.

Telephone Voicing Report For Type:System - Menu

Language	Modify?	Load?	ID	Annotation
English	Yes	No	89	Welcome To eSchool Solutions.
English	Yes	No	91	This is the SmartFindExpress system calling for
English	No	No	93	Invalid
English	No	No	95	Utility
English	No	No	97	Menu
English	No	No	99	is not voiced
English	No	No	101	Please enter your district Id followed by the * key.
English	No	No	103	Please enter your access id followed by the * key.
English	No	No	105	Please enter your pin followed by the * key
English	No	No	107	To exit press 9.
English	No	No	109	If you are calling as an Employee Press 1
English	No	No	111	If you are calling as a Substitute press 2
English	No	No	113	If you are calling as an Administrator press 3
English	No	No	115	To review or cancel your assignments press 1
English	No	No	117	To hear available jobs press 2

Voicing IDs

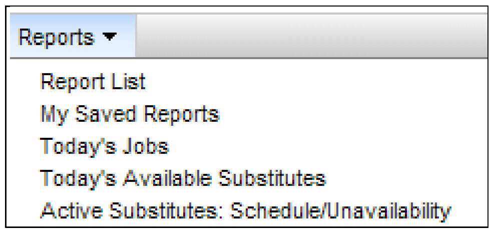
Follow this procedure to modify and voice IDs:

1. Select Telephone Voicing from the menu and locate the voicing ID.
2. Modify the annotation if you are voicing something different than the description listed.
3. Call the system and enter your Access ID followed by the star (*) key; enter your PIN followed by the star (*) key.
4. Press “5” on your telephone keypad to record system voicing.
5. Follow the prompts to record and replay the recording

Reports

The Reports menu enables administrators to create customized job, employee, and substitute reports, access saved reports, schedule reports and generate on-demand reports all from one central location. All report data is limited to the location access in the Administrator's profile. The reports available from this menu are also accessible from the Administrator drop-down menu, Job Inquiry/Reports and Profile Inquiry/Reports options. The ability to perform reporting functions directly from the Reports menu enables administrators to access critical information for their location(s) with added speed and convenience. Report data can be easily exported in a variety of formats including, CSV, PDF, DOCX and Excel.

The Reports menu contains the following features:

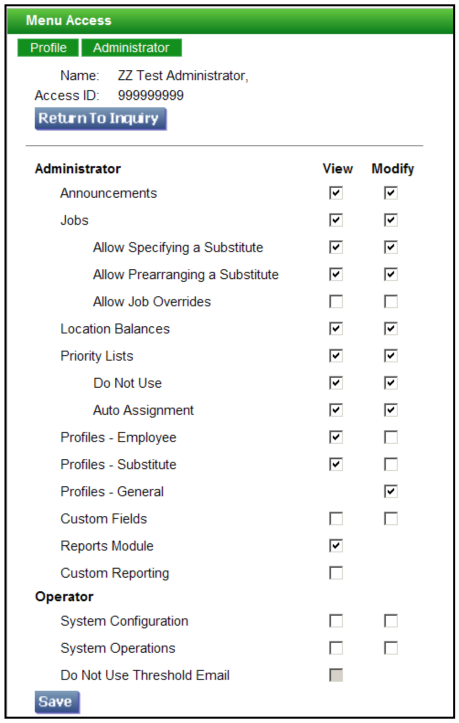


Feature	Description
Report List	Displays the list of job, employee and substitute reports that are available in the system. Each report has a set-up page for selecting the data to display on the report. Reports can be run, saved and scheduled. When a report is saved, it is saved to the "My Saved Reports" folder.
My Saved Reports	Displays the reports that have been saved for re-use. Saved reports can be viewed, edited and scheduled/unscheduled. Reports can be scheduled to run immediately or at specified intervals. New reports can be created and run using the saved report parameters or with modified parameters.
Today's Jobs	Generates a Today's Jobs report for the current day for the administrator's location.
Today's Available Substitutes	Generates a Today's Available Substitutes report for the current day for the administrator's location.
Active Substitutes: Schedule/Unavailability	Generates an Active Substitutes: Schedule/Unavailability report for the current day for the administrator's location.

Administrator Access

Administrator profiles must have the *Reports Module* option enabled on the Administrator, Menu Access page to display and use the Report feature. Once enabled, the Reports option displays on the main menu bar of the administrator home page.

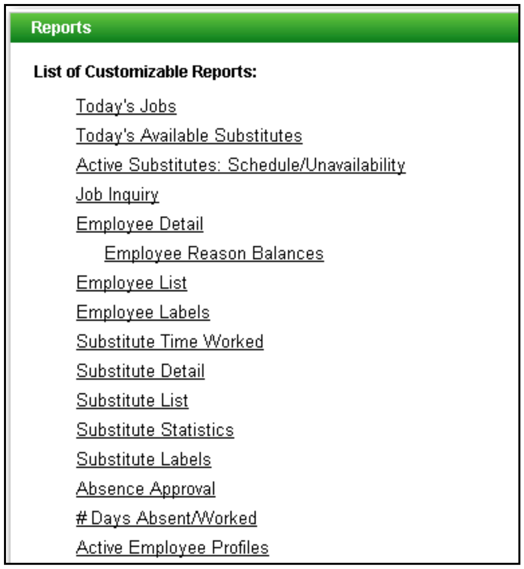
Note: *Report data is limited to the location access configured for the administrator profile.*



Report List

The Report List feature enables administrators to create reports on job, employee and substitute data for their location(s). The following reports are accessible from the Report List. Click on the link o f the report you want to create.

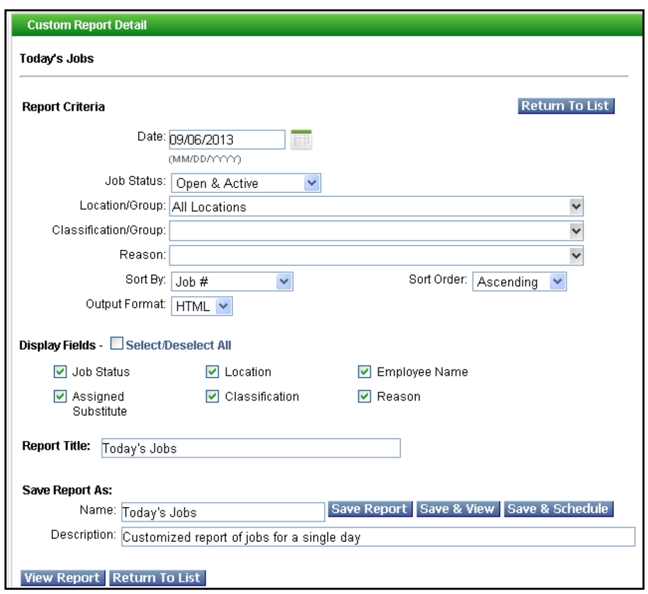
Today's Jobs	Employee List	Substitute Labels
Today's Available Substitutes	Employee Labels	Absence Approval (*if configured for the district*)
Active Substitutes: Schedule/Unavailability	Substitute Time Worked	# Days Absent/Worked
Job Inquiry	Substitute Detail	Active Employee Profiles
Employee Detail	Substitute List	
Employee Reason Balances from Employee Detail report	Substitute Statistics	



Report Detail Page

Clicking on a report link displays the report detail page for the report. After the report parameters are entered on the detail page, the report can be saved and/or viewed. The following fields are common to most of the setup pages.

. **TIP**: *To manually add a second date line to the report header to show the date the report is for, use the Report Title field on the report's setup page. Add the desired date to the report title when running the report.*



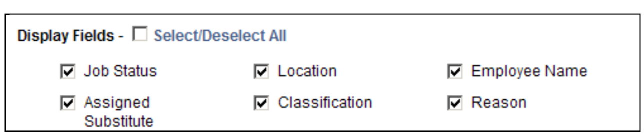
Field	Description
Search Criteria	The fields in this section of the setup page allow you to specify the report search criteria. Search criteria fields vary depending on the report type.
Output Format	The following output formats are available for reports: HTML. PDF, RTF, CSV, and XLS.
Display Fields	Lists the data fields that can appear on the report. Display fields vary depending on the report type.
Report Title	A new report name can be entered in this field to save the report to the My Saved Reports page. This name appears in the report header.
Save Report As	Displays the default report name.
Description	A brief description of the report can be added.
Save Report	Saves the report description and the report parameters for future use. The saved report will display on the ‘My Saved Reports’ page.
View Report	Generates the report in the specified output format.
Save and View	Instantly saves the report to the “My Saved Reports” folder and displays the report in the specified output format.
Save and Schedule	Instantly saves the report to the “My Saved Reports” folder and displays the Schedule Report page. Reports can be scheduled to run immediately, run once, or on a recurring basis. The Schedule Report page also includes an Email Notification option for distributing the report output.
Expand Filters/Collapse Filters	*(These links display on the actual report page)*. Re-displays the selection criteria fields once the report has been generated. The report can be re-run with different filters. The Collapse Filters option displays the original report page.

Date Fields

Date fields on report detail pages default to the current day; but a different date can be entered.

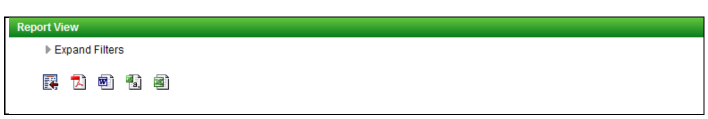
Select/Deselect All

The *Select/Deselect All* option in the Display Fields section of the setup page can be used to clear the display fields or to select all of the fields for the report with one action.



Export Formats

Report data can be easily exported. When a report is generated, the export options for the report are displayed at the top of the report page. Click on an export icon to display the report data in the export format.

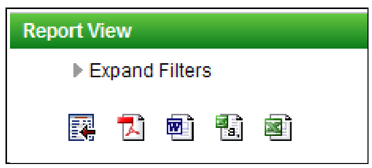


Export icons are as follows:

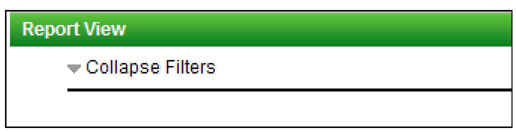
Output Format Icon	Description
	Exports to a PDF file.
	Exports to an Excel file.
	Exports to a DOCX file.
	Exports to a CSV file.

Expand/Collapse Filters

Once a report is generated, it can be re-run with different search criteria from the same window by clicking on the Expand Filters option located above the Export icons.

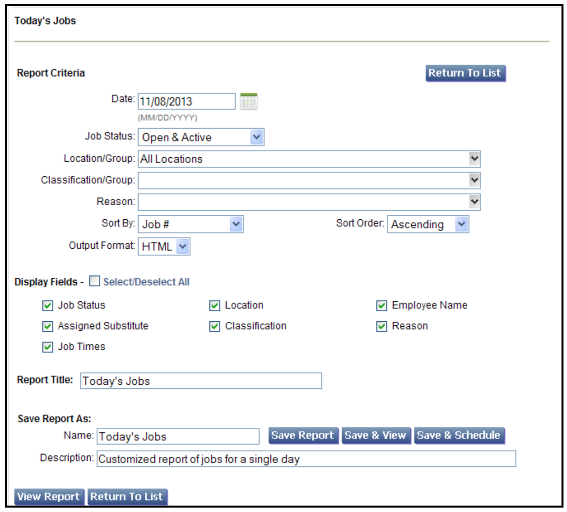


When selected, the system re-displays the search criteria fields for that report. Additional filters can be applied to the report and the report can be re-run by clicking the Run Report button. Click the Collapse Filters option to return to the original report page.

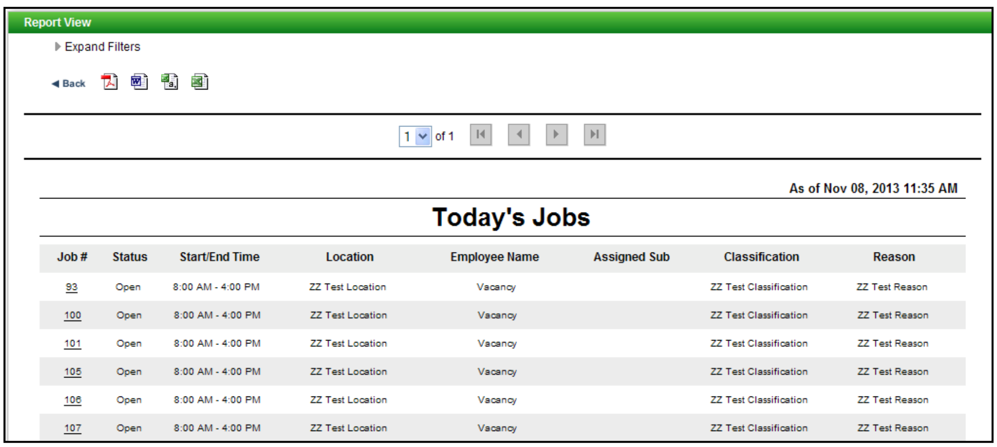


Today's Jobs Report

The Today's Jobs report displays all job information for the administrator's location(s) for a single day. On the report setup page, select the search criteria for the report and the data to display on the report. Enter a name and description for the report. The report can be saved, saved and viewed or saved and scheduled.



Sample Report View

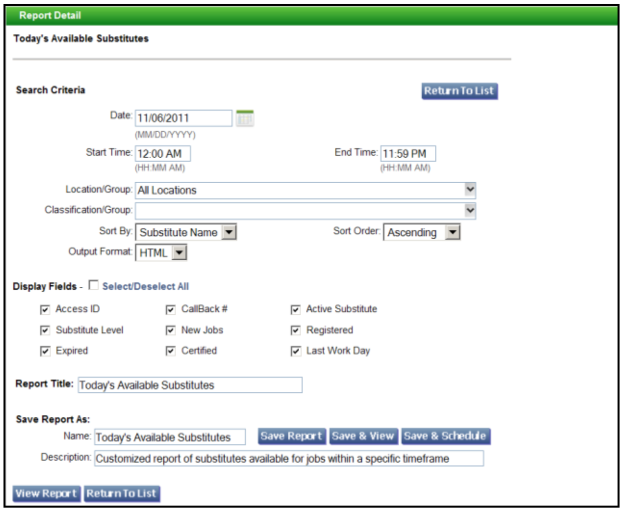


Job #	Status	Start/End Time	Location	Employee Name	Assigned Sub	Classification	Reason
93	Open	8:00 AM - 4:00 PM	ZZ Test Location	Vacancy		ZZ Test Classification	ZZ Test Reason
100	Open	8:00 AM - 4:00 PM	ZZ Test Location	Vacancy		ZZ Test Classification	ZZ Test Reason
101	Open	8:00 AM - 4:00 PM	ZZ Test Location	Vacancy		ZZ Test Classification	ZZ Test Reason
105	Open	8:00 AM - 4:00 PM	ZZ Test Location	Vacancy		ZZ Test Classification	ZZ Test Reason
106	Open	8:00 AM - 4:00 PM	ZZ Test Location	Vacancy		ZZ Test Classification	ZZ Test Reason
107	Open	8:00 AM - 4:00 PM	ZZ Test Location	Vacancy		ZZ Test Classification	ZZ Test Reason

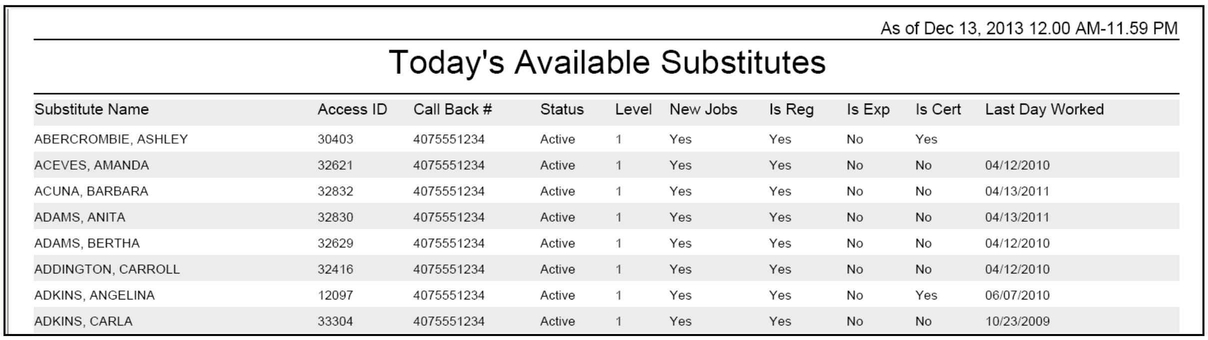
Today's Available Substitutes Report

The Today's Available Substitutes report displays availability information on all substitutes for the current day.

On the report setup page, select the search criteria for the report and the data to display on the report. Enter a name and description for the report. The report can be saved, saved and viewed or saved and scheduled.



Sample Report View


As of Dec 13, 2013 12.00 AM-11.59 PM

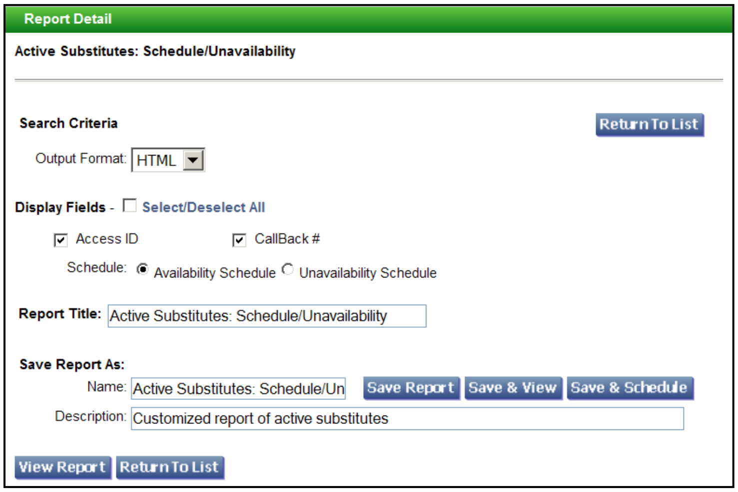
Today's Available Substitutes

Substitute Name	Access ID	Call Back #	Status	Level	New Jobs	Is Reg	Is Exp	Is Cert	Last Day Worked
ABERCROMBIE, ASHLEY	30403	4075551234	Active	1	Yes	Yes	No	Yes	
ACEVES, AMANDA	32621	4075551234	Active	1	Yes	Yes	No	No	04/12/2010
ACUNA, BARBARA	32832	4075551234	Active	1	Yes	Yes	No	No	04/13/2011
ADAMS, ANITA	32830	4075551234	Active	1	Yes	Yes	No	No	04/13/2011
ADAMS, BERTHA	32629	4075551234	Active	1	Yes	Yes	No	No	04/12/2010
ADDINGTON, CARROLL	32416	4075551234	Active	1	Yes	Yes	No	No	04/12/2010
ADKINS, ANGELINA	12097	4075551234	Active	1	Yes	Yes	No	Yes	06/07/2010
ADKINS, CARLA	33304	4075551234	Active	1	Yes	Yes	No	No	10/23/2009

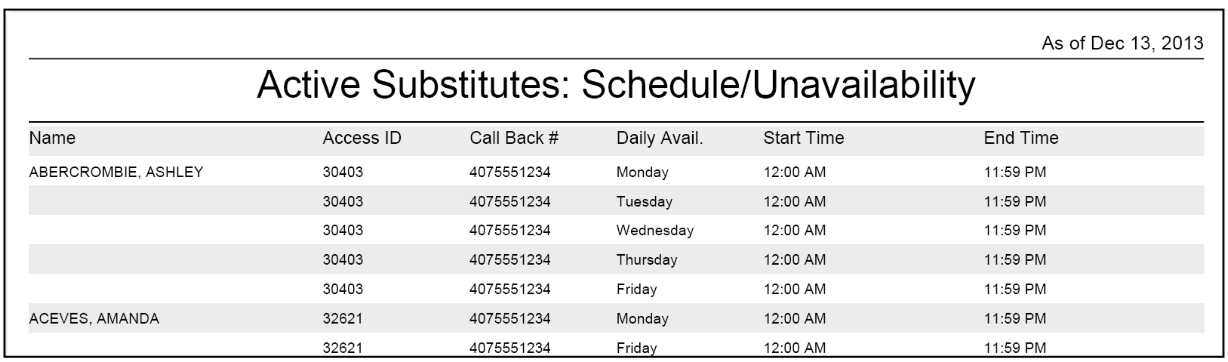
Active Substitutes: Schedule/Unavailability

The Active Substitutes report displays schedule and unavailability dates/times for all active substitutes who can accept jobs for the administrator's location(s).

On the report setup page, select the search criteria for the report and the data to display on the report. Enter a name and description for the report. The report can be saved, saved and viewed or saved and scheduled.



Sample Report View



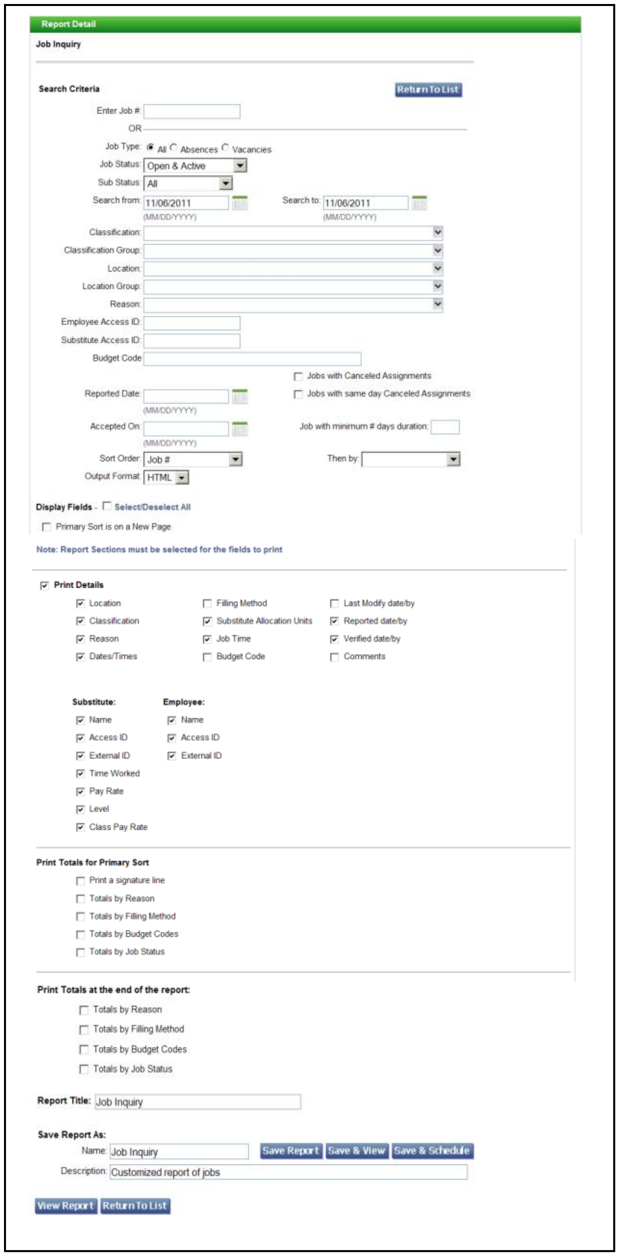
As of Dec 13, 2013

Active Substitutes: Schedule/Unavailability

Name	Access ID	Call Back #	Daily Avail.	Start Time	End Time
ABERCROMBIE, ASHLEY	30403	4075551234	Monday	12:00 AM	11:59 PM
	30403	4075551234	Tuesday	12:00 AM	11:59 PM
	30403	4075551234	Wednesday	12:00 AM	11:59 PM
	30403	4075551234	Thursday	12:00 AM	11:59 PM
	30403	4075551234	Friday	12:00 AM	11:59 PM
ACEVES, AMANDA	32621	4075551234	Monday	12:00 AM	11:59 PM
	32621	4075551234	Friday	12:00 AM	11:59 PM

Job Inquiry Report

The Job Inquiry report can be used to create numerous inquiry reports and can be run with different combinations of search criteria and report parameters. Searches can be conducted on a specific job or search criteria can be entered to perform job searches on multiple jobs. Select the details to include on the report and the options for sorting and for displaying totals. The report can be saved, saved and viewed or saved and scheduled.



Sample Report View

As of Dec 13, 2013 2:51 PM

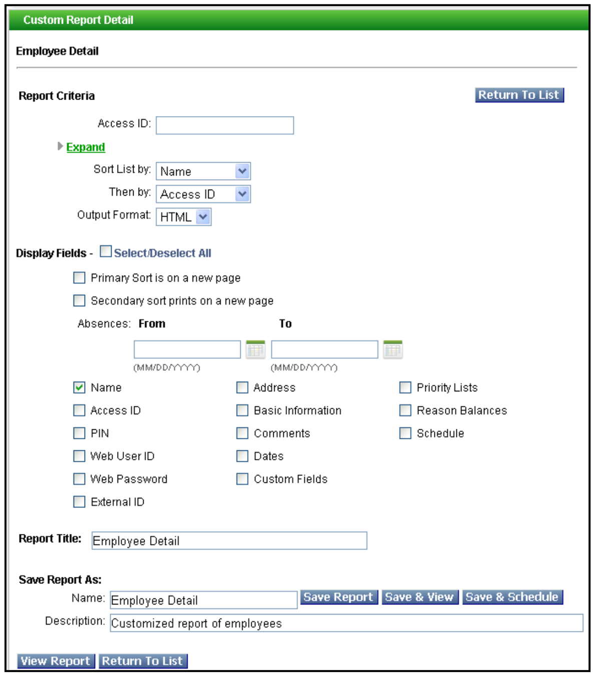
Job Inquiry

Job #	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 HH:MM Sub HH:MM Job:Units
59	Open/Open ZZ Test Employee,	888888888		ZZ Test Classification ZZ Test Location ZZ Test Reason	0	12/16/2013 07:30 AM 12/16/2013 07:30 AM O: Solutions, eSchool	12/20/2013 04:00 PM 12/20/2013 04:00 PM 12/13/2013 02:50 PM	08:30 15.0

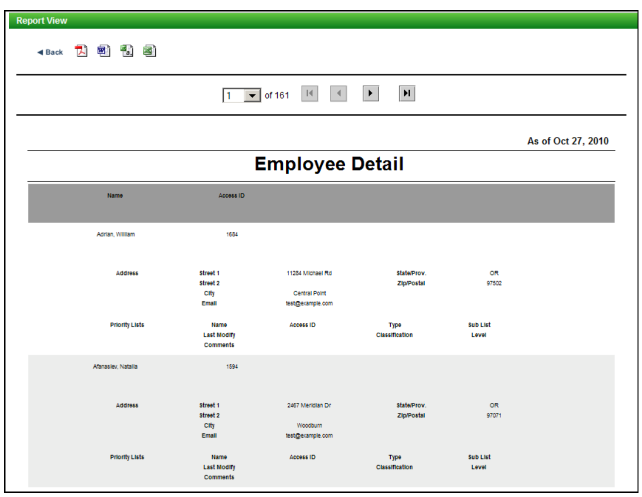
Employee Detail Report

The Employee Detail report displays information on a single employee or on multiple employees based on the search criteria and on the profile data selected for the report. Many customized reports can be created.

On the report setup page, select the search criteria for the report and the data to display on the report. Click the Expand link to display additional report criteria. Enter a name and description for the report. The report can be viewed, saved, and scheduled.

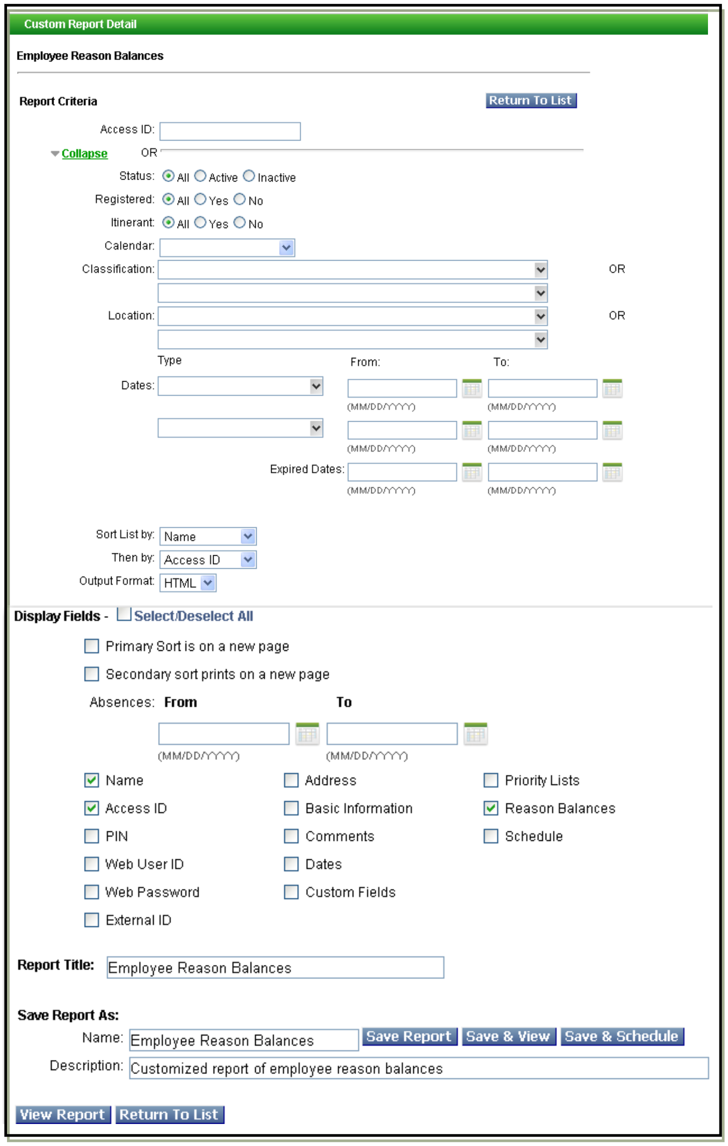


Sample Report View

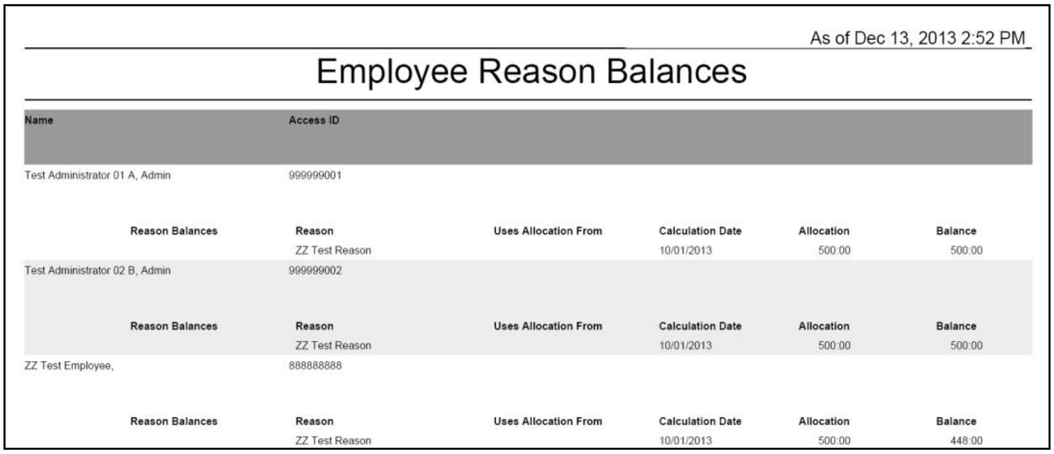


Employee Reason Balances Report

The Reason Balances report displays reason balance information on a single employee or on multiple employees based on the search criteria. The report is based off of the Employee Detail report.



Sample Report View


As of Dec 13, 2013 2:52 PM

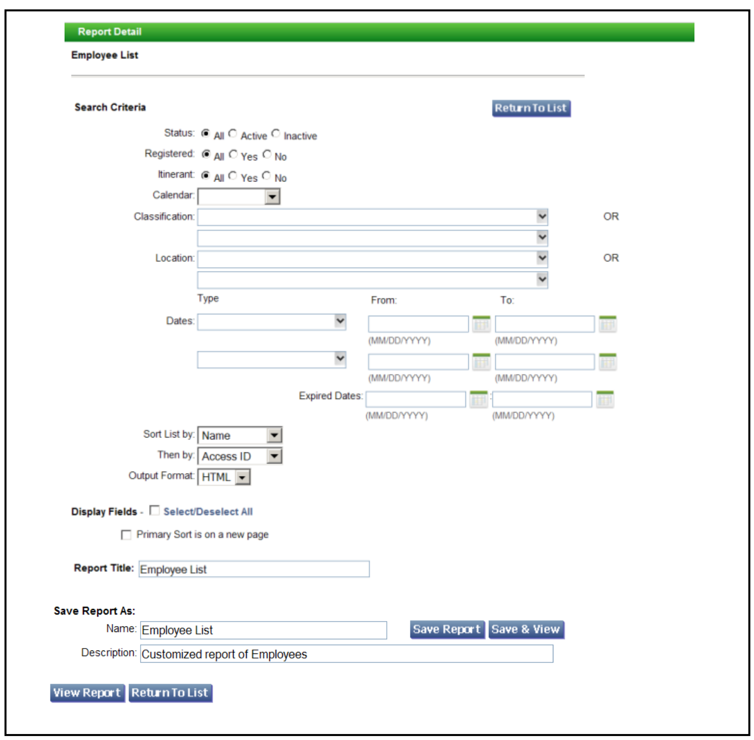
Employee Reason Balances

Name	Access ID				
Test Administrator 01 A, Admin	999999001				
Reason Balances	Reason	Uses Allocation From	Calculation Date	Allocation	Balance
	ZZ Test Reason		10/01/2013	500.00	500.00
Test Administrator 02 B, Admin	999999002				
Reason Balances	Reason	Uses Allocation From	Calculation Date	Allocation	Balance
	ZZ Test Reason		10/01/2013	500.00	500.00
ZZ Test Employee,	888888888				
Reason Balances	Reason	Uses Allocation From	Calculation Date	Allocation	Balance
	ZZ Test Reason		10/01/2013	500.00	448.00

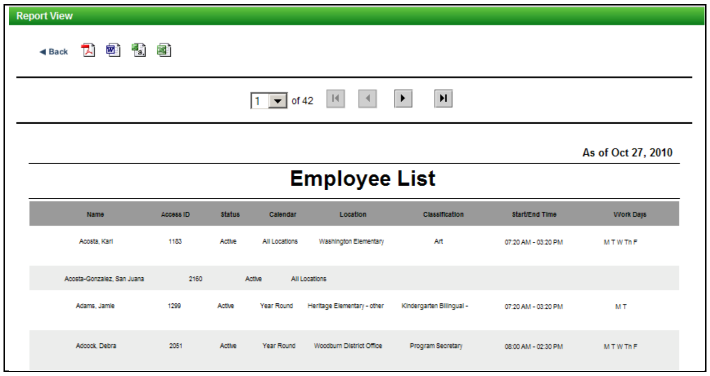
Employee List Report

The Employee List report displays profile information on employees that match the search criteria.

On the report setup page, select the search criteria for the report and the data to display on the report. Enter a name and description for the report. The report can be saved and/or viewed.



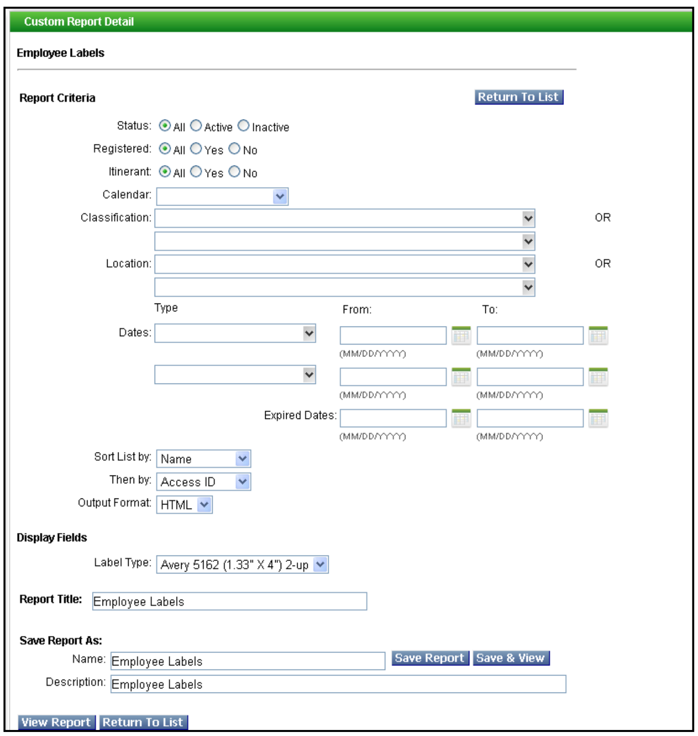
Sample Report View



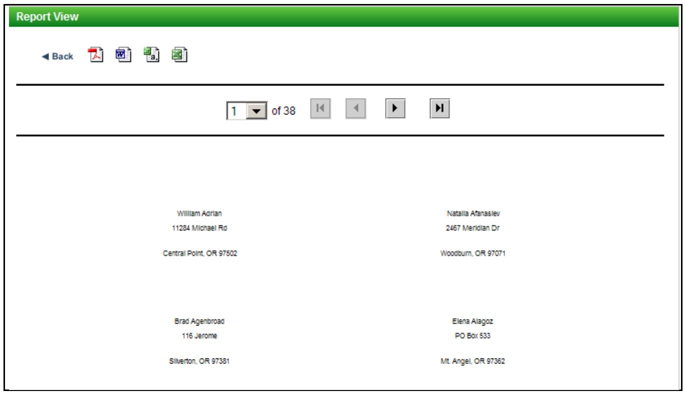
Employee Labels

The Employee Labels report displays labels based on the specified label type for all employees that match the search criteria. Labels include name, address, city, state, and zip code if this information is provided on the employee profile. The label types are:

- Avery 5162 (1.33” X 4”) 2-up
- Avery 5163 (2” X 4”) 2-up
- Avery 5164 (3.33” X 4”) 2-up
- Avery 5160 (1” X 2.63”) 3-up

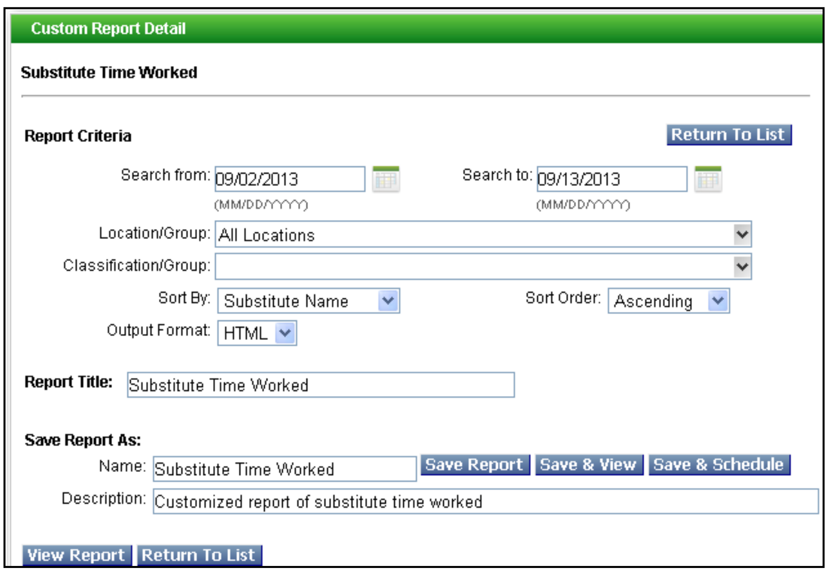


Sample Report View

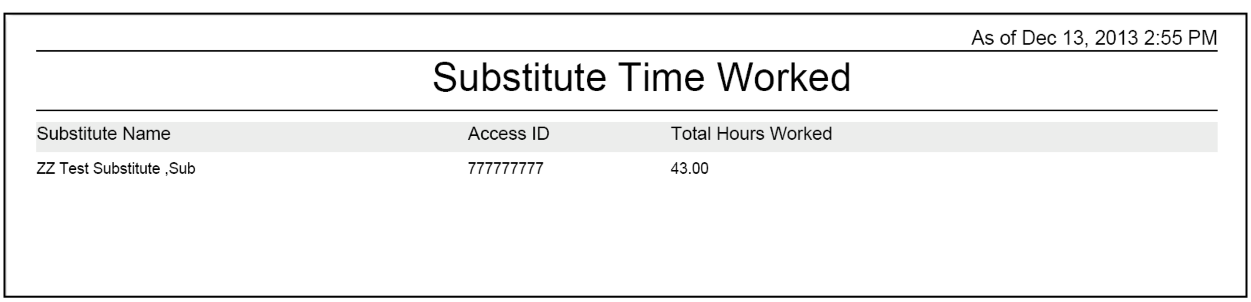


Substitute Time Worked

The Substitute Time Worked report enables administrators to generate a report of the calculated total hours worked by a substitute. The report can be filtered by Location/Group and Classification/Group. Report output can be saved, saved and viewed, or saved and scheduled.



Sample Report View



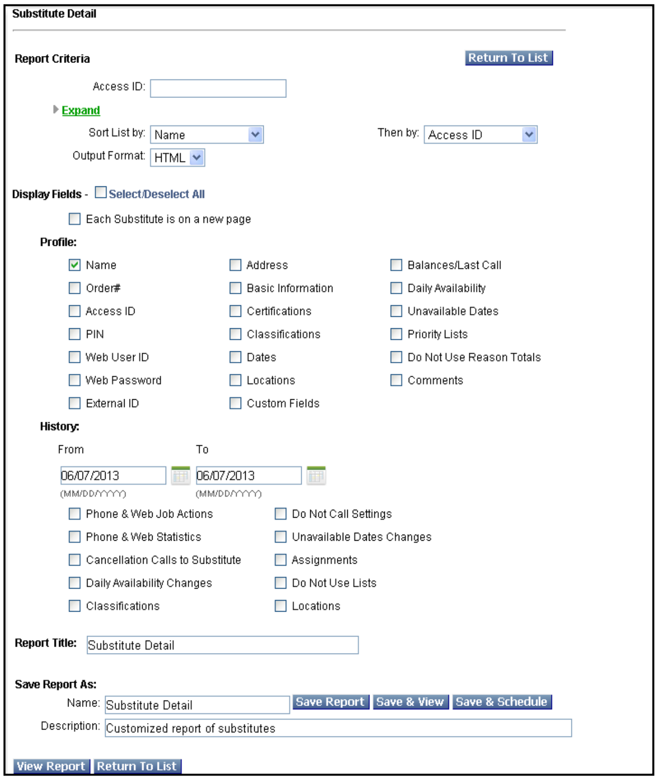
As of Dec 13, 2013 2:55 PM

Substitute Time Worked

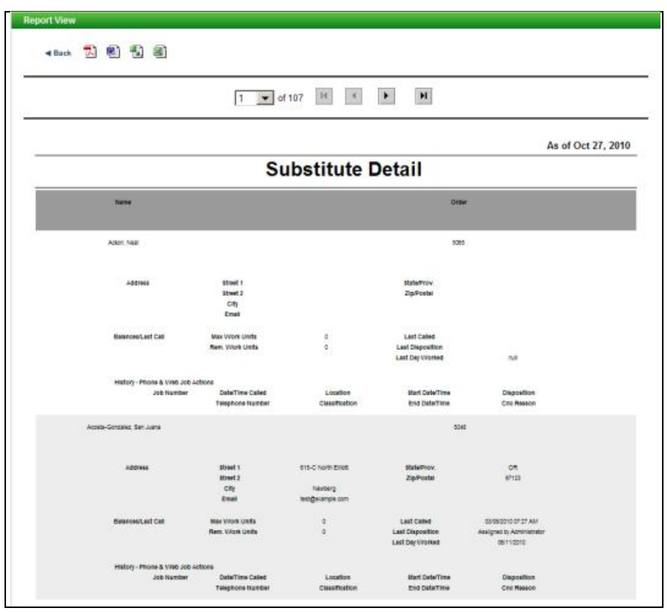
Substitute Name	Access ID	Total Hours Worked
ZZ Test Substitute ,Sub	777777777	43.00

Substitute Detail Report

The Substitute Detail report displays information on a single substitute or for multiple substitutes based on the report search criteria and on the Profile and History data selected for the report. Click the Expand link to display additional report criteria. Many customized reports can be created. The report can be viewed, saved and scheduled.

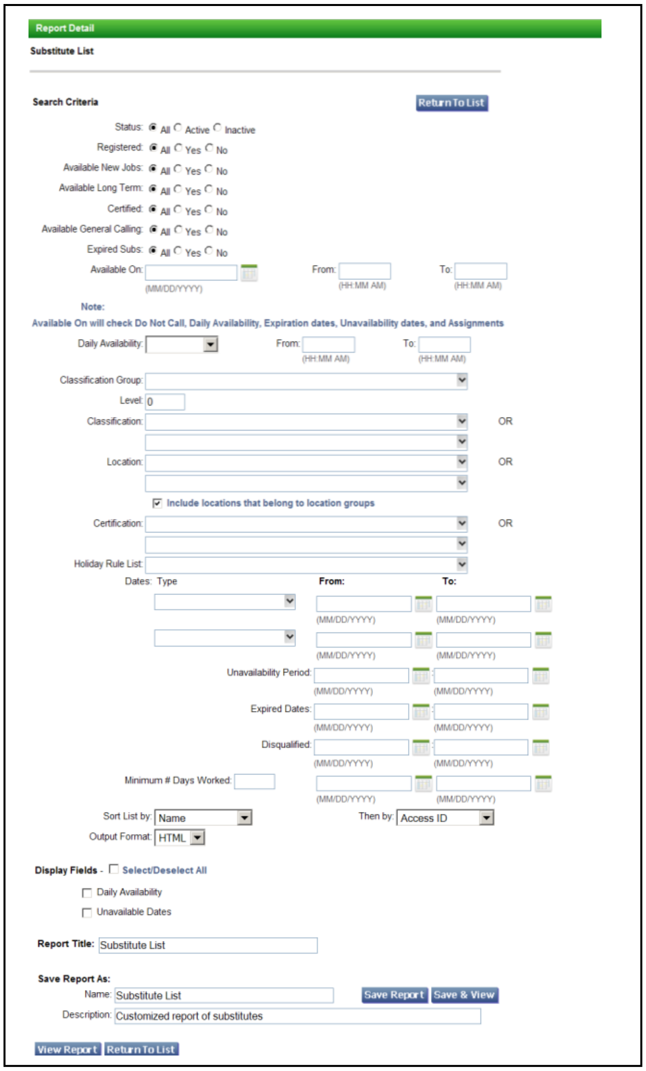


Sample Report View

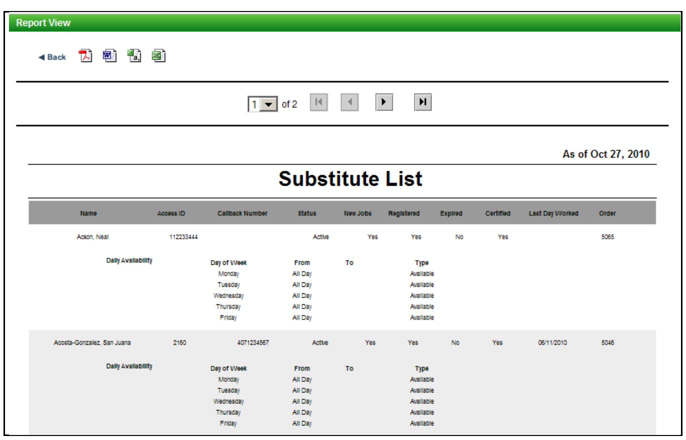


Substitute List Report

The Substitute List report displays Daily Availability and/or Unavailability Dates information for substitutes that match the report search criteria. A variety of customized reports can be created.

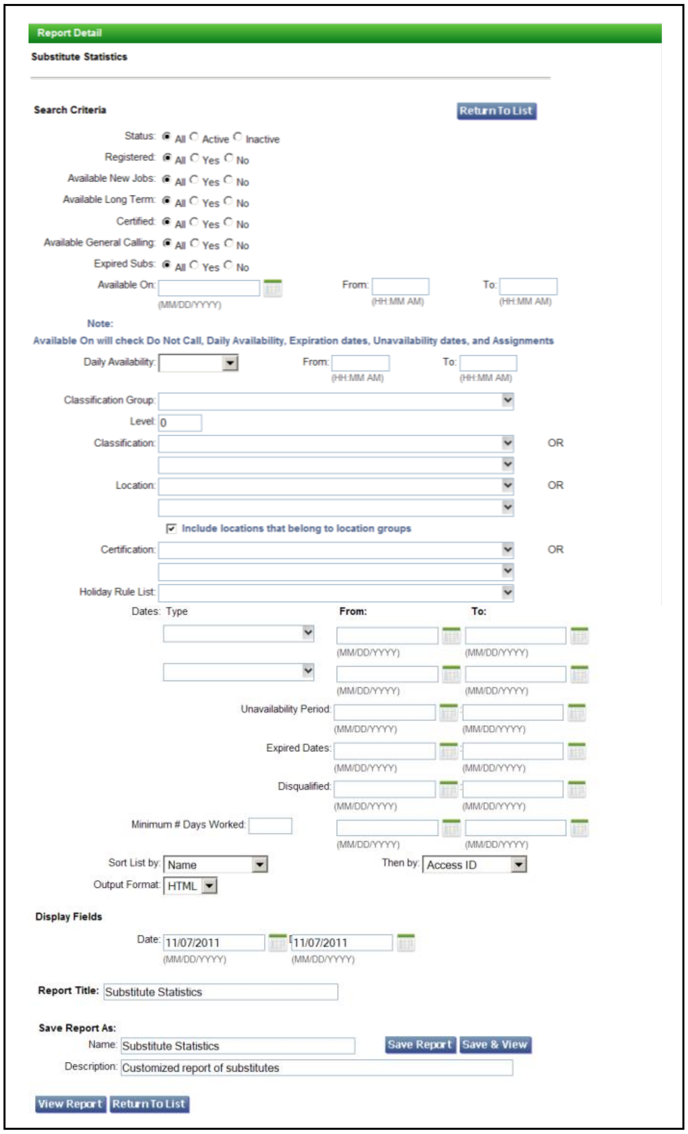


Sample Review View

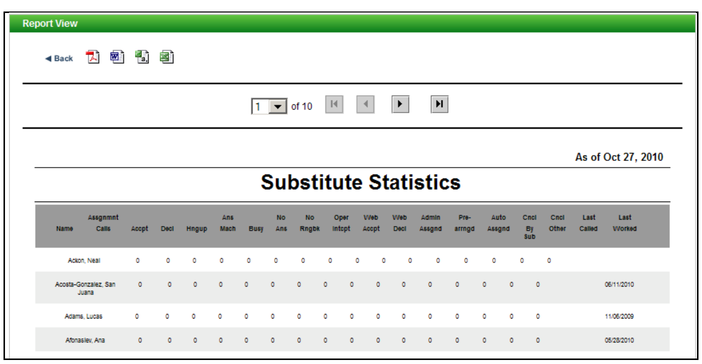


Substitute Statistics Report

The Substitute Statistics report displays statistics on assignments calls, type of assignment call, and assignment type for all substitutes that match the search criteria. A date range must be entered for the statistics.



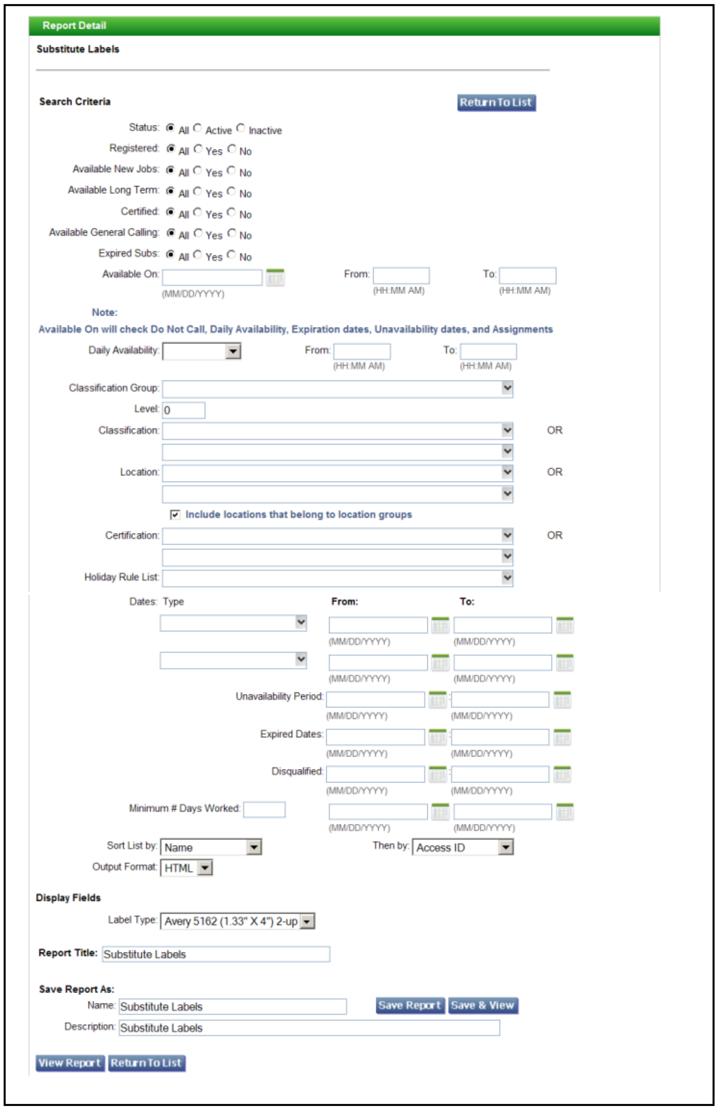
Sample Report View



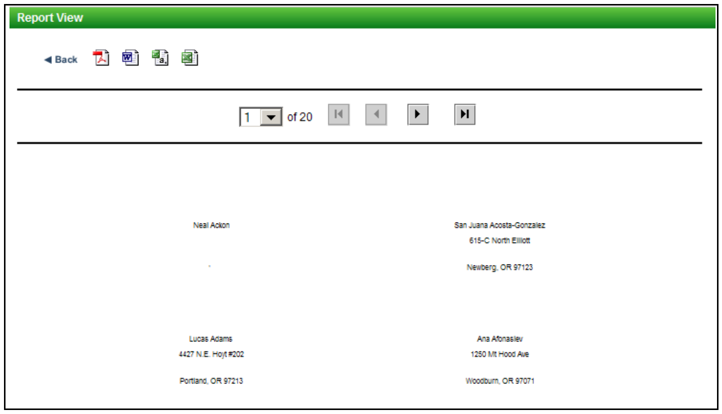
Substitute Labels Report

The Substitute Labels report displays labels based on the specified label type for all substitutes that match the search criteria. Labels include name, address, city, state, and zip code if this information is provided on the employee profile. The label types are:

- Avery 5162 (1.33" X 4") 2-up
- Avery 5163 (2" X 4") 2-up
- Avery 5164 (3.33" X 4") 2-up
- Avery 5160 (1" X 2.63") 3-up

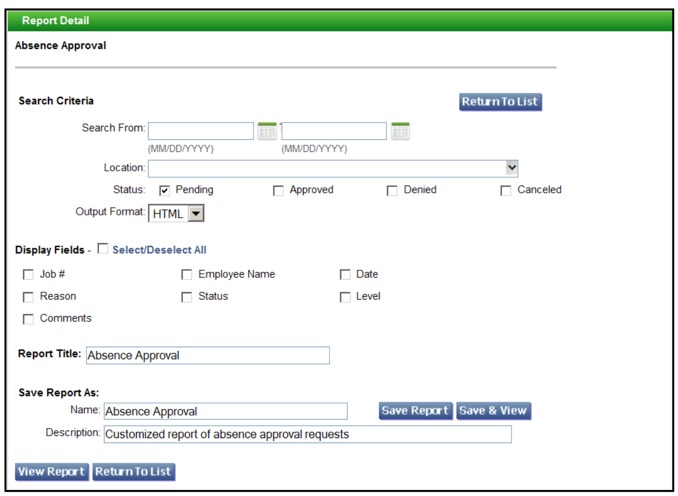


Sample Report View

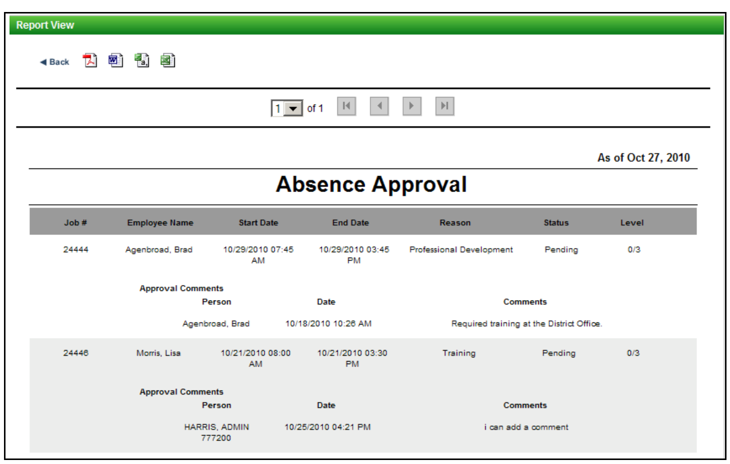


Absence Approval Report

The Absence Approval Report displays information on absence approval requests based on the search criteria entered and on the fields selected for the report. A report name and description can be added to the report. The report can be saved and/or viewed.



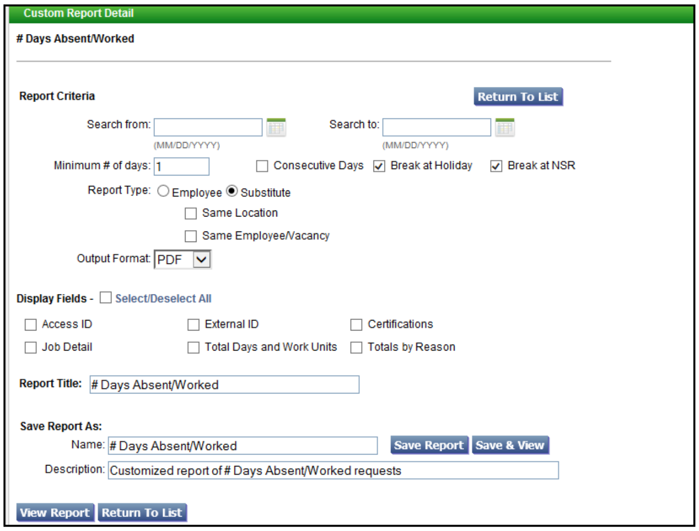
Sample Report View



Days Worked/Absent Report

The # Days Absent/Worked report enables system operators and administrators to run a report to get a total for the number of days an employee was absent and run a report to get a total for the number of assignments a substitute has worked. Both report types have additional filtering options. The ‘Break at Holiday’ and ‘Break at NSR’ checkboxes can be used to indicate if the consecutive days’ calculation should break at these occurrences.

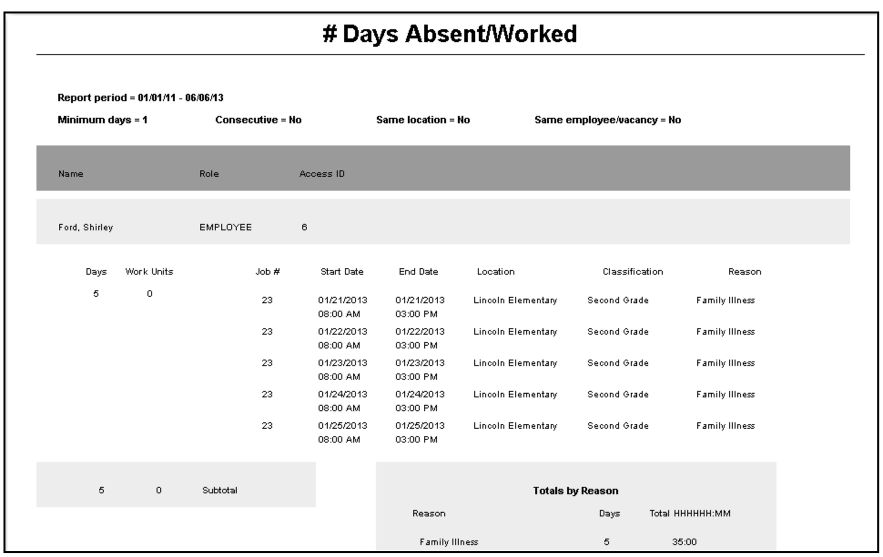
The report can be output in HTML, PDF, RTF, CSV, or XLS format.



Report Type - Employee

Administrators can run a report that gives a total for the number of days an employee was absent, for a specified date range. The report can be filtered for consecutive days’ absences; with the ability to also indicate a minimum number of days consecutive. In addition, the report can be filtered for consecutive days worked for the same employee or the same location. The report will separately list the results when there is more than one occurrence for consecutive days absent. Each occurrence and total for the occurrence is listed separately.

Sample # Days Absent/Worked Report – Employee Details



Days Absent/Worked

Report period = 01/01/11 - 06/06/13
Minimum days = 1 Consecutive = No Same location = No Same employee/vacancy = No

Name	Role	Access ID
Ford, Shirley	EMPLOYEE	6

Days	Work Units	Job #	Start Date	End Date	Location	Classification	Reason
5	0	23	01/21/2013 08:00 AM	01/21/2013 03:00 PM	Lincoln Elementary	Second Grade	Family Illness
		23	01/22/2013 08:00 AM	01/22/2013 03:00 PM	Lincoln Elementary	Second Grade	Family Illness
		23	01/23/2013 08:00 AM	01/23/2013 03:00 PM	Lincoln Elementary	Second Grade	Family Illness
		23	01/24/2013 08:00 AM	01/24/2013 03:00 PM	Lincoln Elementary	Second Grade	Family Illness
		23	01/25/2013 08:00 AM	01/25/2013 03:00 PM	Lincoln Elementary	Second Grade	Family Illness

5 0 Subtotal

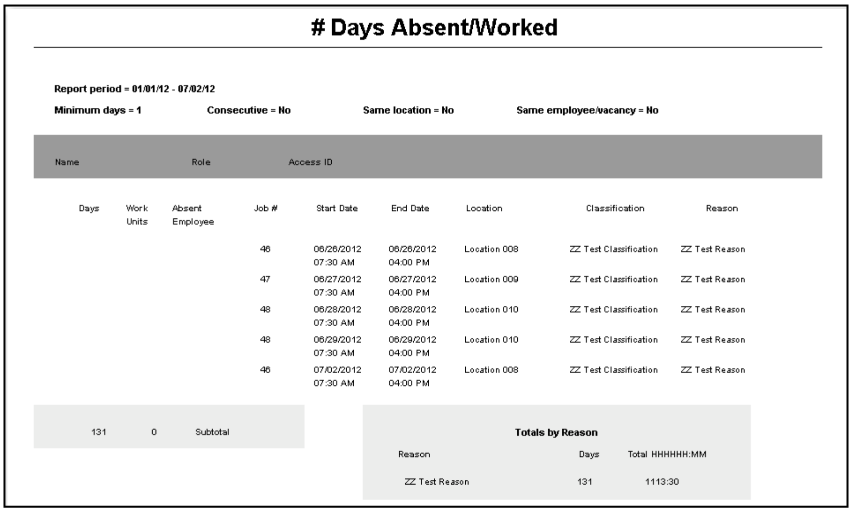
Totals by Reason

Reason	Days	Total HHHHHH:MM
Family Illness	5	35:00

Report Type - Substitute

Administrators can run a report for the number of days a substitute worked during a specified date range, including an option for consecutive days worked. The report can be filtered for consecutive days worked for the same employee or the same location. The report can be filtered for a minimum number of consecutive days. The report will separately list the results when there is more than one occurrence for consecutive days absent. Each occurrence and total for the occurrence is listed separately.

Sample # Days Absent/Worked Report – Substitute Details



 # Days Absent/Worked

Report period = 01/01/12 - 07/02/12

Minimum days = 1 **Consecutive = No** **Same location = No** **Same employee/vacancy = No**

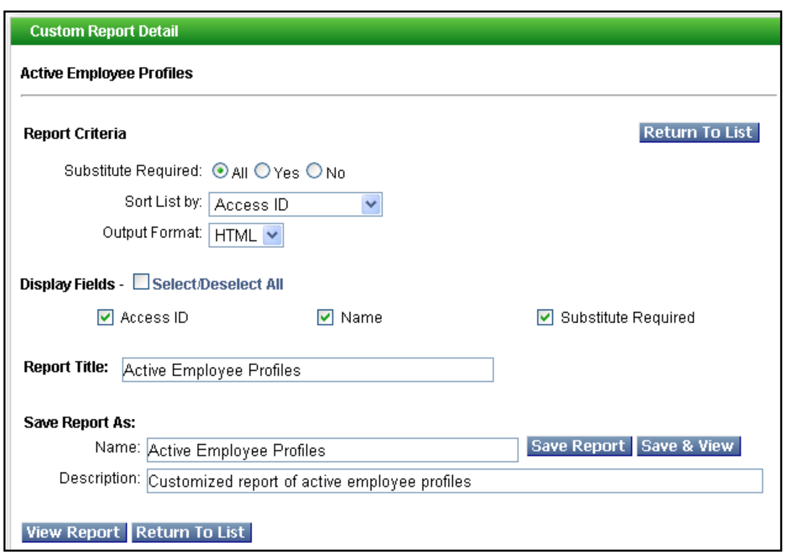
Name	Role	Access ID						
Days	**Work Units**	**Absent Employee**	**Job #**	**Start Date**	**End Date**	**Location**	**Classification**	**Reason**
			46	06/26/2012 07:30 AM	06/26/2012 04:00 PM	Location 008	ZZ Test Classification	ZZ Test Reason
			47	06/27/2012 07:30 AM	06/27/2012 04:00 PM	Location 009	ZZ Test Classification	ZZ Test Reason
			48	06/28/2012 07:30 AM	06/28/2012 04:00 PM	Location 010	ZZ Test Classification	ZZ Test Reason
			48	06/29/2012 07:30 AM	06/29/2012 04:00 PM	Location 010	ZZ Test Classification	ZZ Test Reason
			46	07/02/2012 07:30 AM	07/02/2012 04:00 PM	Location 008	ZZ Test Classification	ZZ Test Reason
131	0	Subtotal						

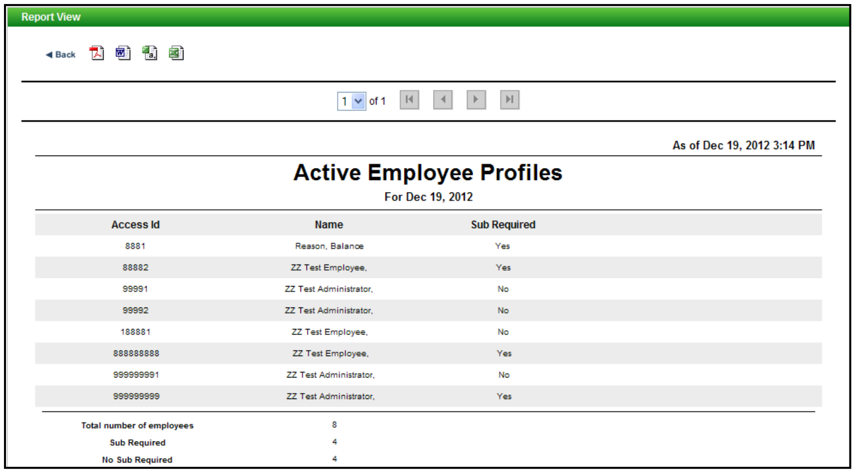
Totals by Reason

Reason	Days	Total HHHHHH:MM
ZZ Test Reason	131	1113:30

Active Employee Profiles Report

The Active Employee Profiles report enables system operators to generate a report on the total number of active employee profiles for the district. The report displays totals for the number of active employees, the number of active employees who require a substitute and for the number of active employees who do not require an active substitute. The report is for the current day only.




Report View

As of Dec 19, 2012 3:14 PM

Active Employee Profiles

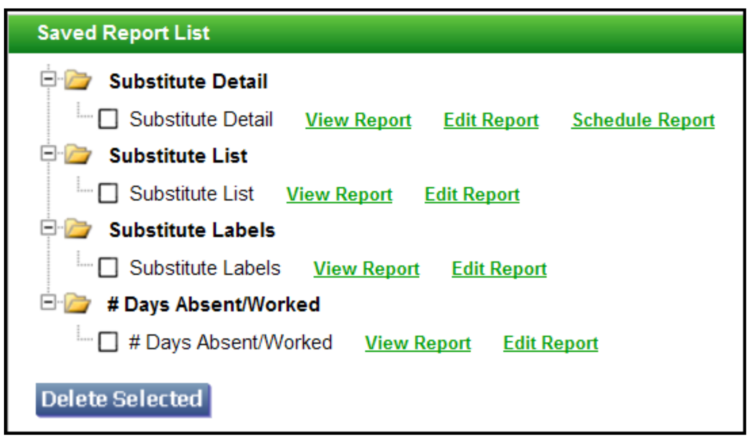
For Dec 19, 2012

Access Id	Name	Sub Required
8881	Reason, Balance	Yes
88882	ZZ Test Employee,	Yes
99991	ZZ Test Administrator,	No
99992	ZZ Test Administrator,	No
188881	ZZ Test Employee,	No
888888888	ZZ Test Employee,	Yes
999999991	ZZ Test Administrator,	No
999999999	ZZ Test Administrator,	Yes

Total number of employees	8
Sub Required	4
No Sub Required	4

My Saved Reports

The My Saved Reports feature provides access to all reports that have been created and saved. Reports can be viewed, edited, scheduled, or deleted from the Saved Report List.

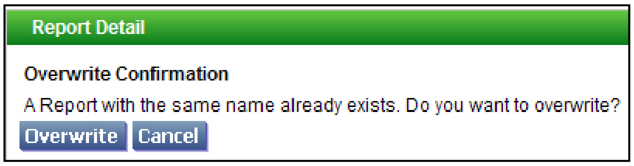


View Report

To view a saved report, click the *View Report* link for the report. The report content is displayed for review. The report can be exported into any of the programs displayed at the top of the report page.

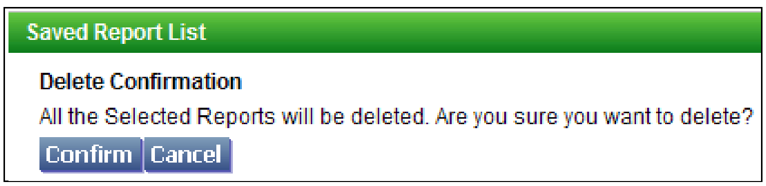
Edit Report

To edit and re-run a saved report, click the *Edit Report* link. The report's setup page is displayed. Changes can be made to the original search criteria and to the report detail used for the report. The report can be rerun and/or saved. If saving the new version of the report with the same name, you will be asked to confirm the overwrite action.



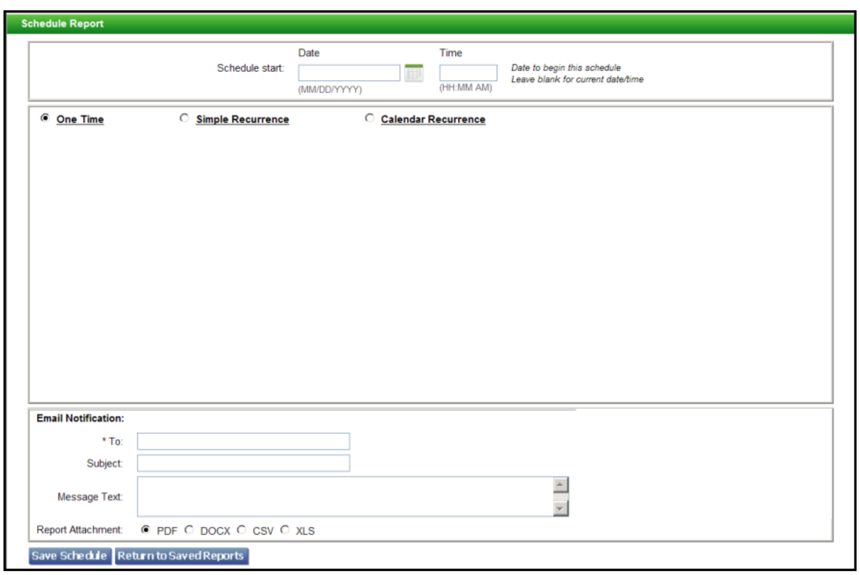
If saved, the new version of the report will appear on the Saved Report List.

To delete a saved report, click the box next to the report name and then click the Delete Selected button. You will be asked to confirm the delete action. Click Confirm to delete the report.



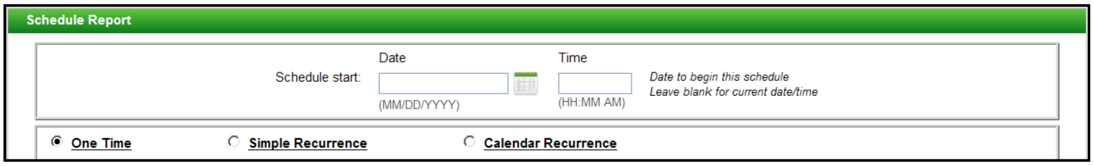
Schedule Report

When the Schedule Report link is selected, the Schedule Report page is displayed. Reports can be scheduled to run once or on a recurring basis at specified intervals. Email notifications can be configured for distributing the report after it has run. The report output can be formatted as a .PDF, .DOCX, .CSV, or .XLS file.



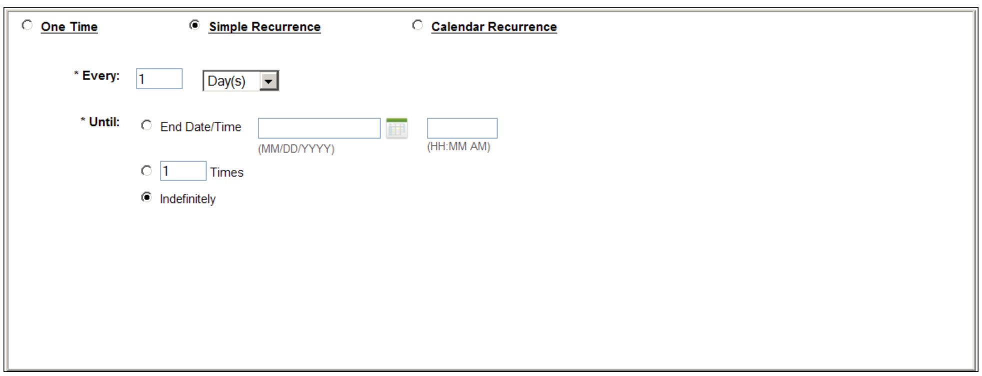
Scheduling Option: One Time

Select the "One Time" scheduling option to run the report immediately, or on a defined date/time in the future. Click the Calendar icon to select a future date and time, or leave the fields blank to run the report immediately. Click Save Schedule to run the report. The report output is generated based on the schedule and in the specified format. Email notification is sent to the recipients identified in the Email Notification section.



Scheduling Option: Simple Recurrence

Select the "Simple Recurrence" scheduling option to run a report at defined intervals.

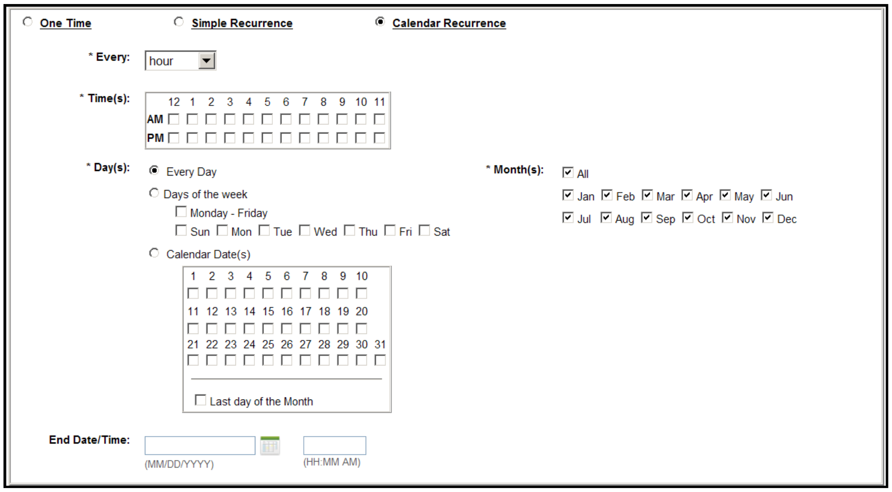


Option	Description
Every	The interval between reports (hours, days, or weeks)
Until	The report's duration. The report can run until the specified calendar date and time is reached and for the specified number of times, or indefinitely.

Once the schedule is defined, click Save Schedule to run the report. The report output is generated based on the schedule and in the specified format. Email notification is sent to the recipients identified in the Email Notification section.

Scheduling Option: Calendar Recurrence

Select the "Calendar Recurrence" scheduling option to run the report on a recurring basis until the end date/time is reached. The recurrence can be defined in hours, days and months:

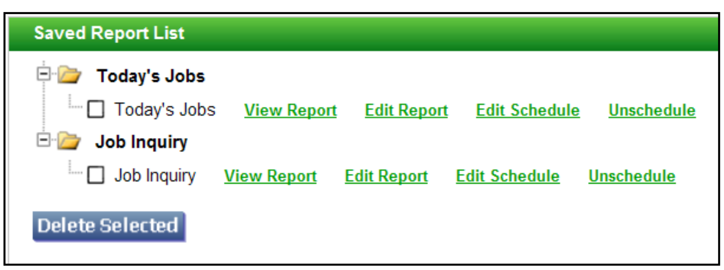


Every	Runs the report hourly or on the half hour.
Time(s)	Check the boxes for the hours of the day the report will run in the AM or PM.
Day(s)	Check the boxes for the days the report will run, every day, weekdays, calendar dates or last day of the month.
Month(s)	Check the boxes for the months the report will run.
End Date/Time	The end date/time the report runs.

Once the schedule is defined, click Save Schedule to run the report. The report output is generated based on the schedule and in the specified format. Email notification is sent to the recipients identified in the Email Notification section.

Edit Schedule/UnSchedule Report

Once a report is scheduled, an Edit Schedule link and an Unschedule link become available for the report.

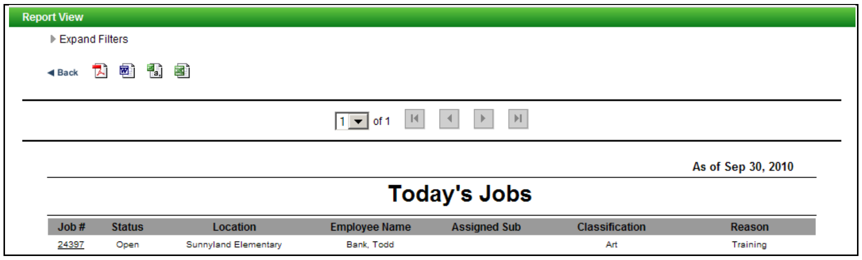


To edit a report schedule, click the Edit Schedule link. The Schedule Report page is displayed. Make any changes to the report schedule and click the Save Schedule button to save the new report schedule.

To *delete a report schedule*, click the Unschedule link. The Schedule Report link is redisplayed for the report.

Today's Jobs Report

When the Today's Jobs report quick link is selected, the report displays all job information for the administrator's location(s) for the current day. To run the report with values other than the system default values, click on the Expand Filters option to display the search criteria fields for the report. Change the values for the report and then click Run Report. A new version of the report is displayed.

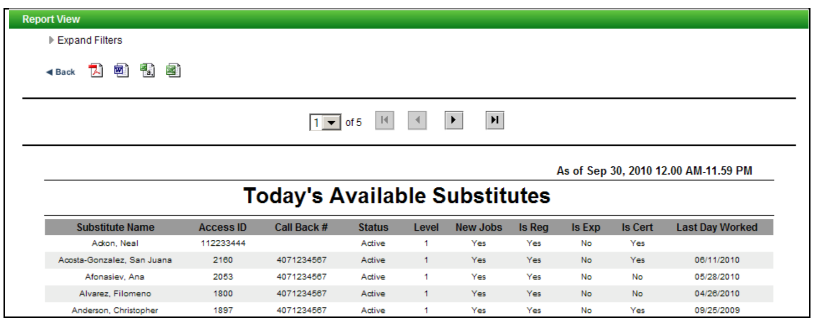


Report View
Expand Filters
Back
1 of 1
As of Sep 30, 2010
Today's Jobs

Job #	Status	Location	Employee Name	Assigned Sub	Classification	Reason
24397	Open	Sunnyland Elementary	Bank, Todd		Art	Training

Today's Available Substitutes

When the Today's Available Substitutes report quick link is selected, the report displays all availability information on all substitutes for the current day. To run the report with values other than the system default values, click on the Expand Filters option to display the search criteria fields for the report. Change the values for the report and then click Run Report. A new version of the report is displayed.

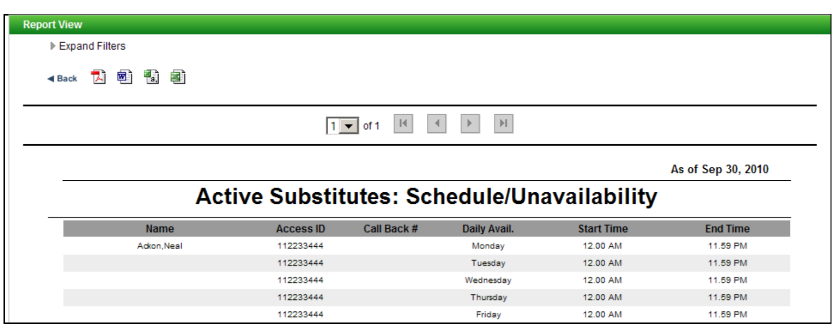


Report View
Expand Filters
Back
1 of 5
As of Sep 30, 2010 12.00 AM-11.59 PM
Today's Available Substitutes

Substitute Name	Access ID	Call Back #	Status	Level	New Jobs	Is Reg	Is Exp	Is Cert	Last Day Worked
Adkon, Neal	112233444		Active	1	Yes	Yes	No	Yes	
Acosta-Gonzalez, San Juana	2160	4071234567	Active	1	Yes	Yes	No	Yes	06/11/2010
Afonasiev, Ana	2053	4071234567	Active	1	Yes	Yes	No	No	05/28/2010
Alvarez, Filomeno	1800	4071234567	Active	1	Yes	Yes	No	No	04/26/2010
Anderson, Christopher	1897	4071234567	Active	1	Yes	Yes	No	Yes	09/25/2009

Active Substitutes: Schedule/Unavailability

When the Active Substitutes: Schedule/Unavailability report quick link is selected, the report displays schedule/unavailability information on all active substitutes who can accept jobs at the administrator's location(s). To run the report with values other than the system default values, click on the Expand Filters option to display the search criteria fields for the report. Change the values for the report and then click Run Report. A new version of the report is displayed.



Report View
Expand Filters
Back
1 of 1
As of Sep 30, 2010
Active Substitutes: Schedule/Unavailability

Name	Access ID	Call Back #	Daily Avail.	Start Time	End Time
Adkon,Neal	112233444		Monday	12.00 AM	11.59 PM
	112233444		Tuesday	12.00 AM	11.59 PM
	112233444		Wednesday	12.00 AM	11.59 PM
	112233444		Thursday	12.00 AM	11.59 PM
	112233444		Friday	12.00 AM	11.59 PM

Configuring System Features to Limit Substitute Assignments

The system provides you with several ways to limit substitute assignments at your location. The following system features can be used:

- In-House Filling –lets you define the number of absences that should be filled by in-house personnel at this location for each workday before a substitute can be assigned.

- Substitute Allocation Units – lets you define a location's limit for the number of absences at that location which may be filled by substitutes over a given time period.

- Minimum Job Days – lets you define the number of days that an employee must be absent before a substitute is required.

Using In-House Filling

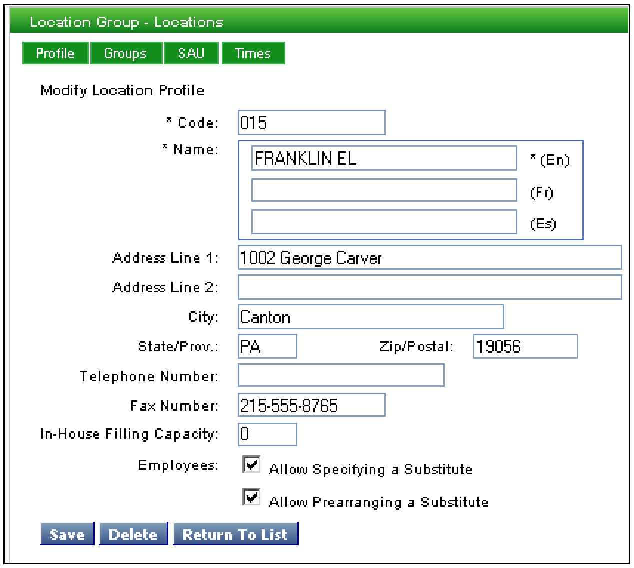
In-House Filling applies to both absences and vacancies, but not to long-term jobs.
When this feature is active, substitutes are not assigned to jobs until the number of jobs exceeds the value specified for each location on a daily basis. Each job is counted as one (1) when being applied to the value set for each location.

The following system features are used to set up In-House Filling:

- Location Profile
- Search Rules
- Reasons
- Classifications

Location Profile

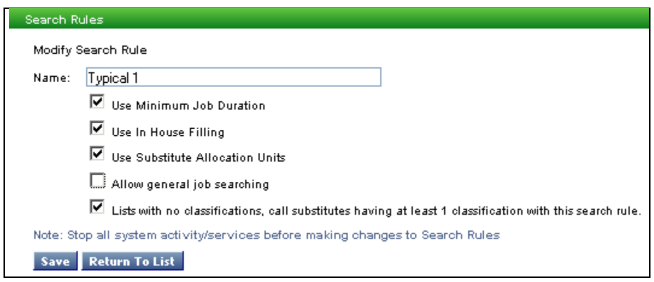
A location's In-House Filling Capacity (IFC) is the number of absences and vacancies in any one day that the location can absorb without requiring a substitute. The IFC for a given location is entered in the *In-House Filling Capacity* field on the Location Profile screen.



Each location can designate the number of absences that can be covered by in-house personnel. This field is only active if a number greater than zero is entered.

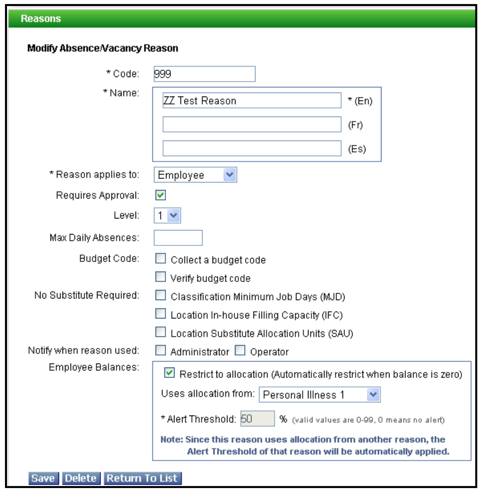
Search Rules

On the Search Rules screen, click in the *Use In-House Filling* checkbox to indicate that this feature is being used in the search rule. You may want to set up a search rule only for the classifications that will use In-House filling.



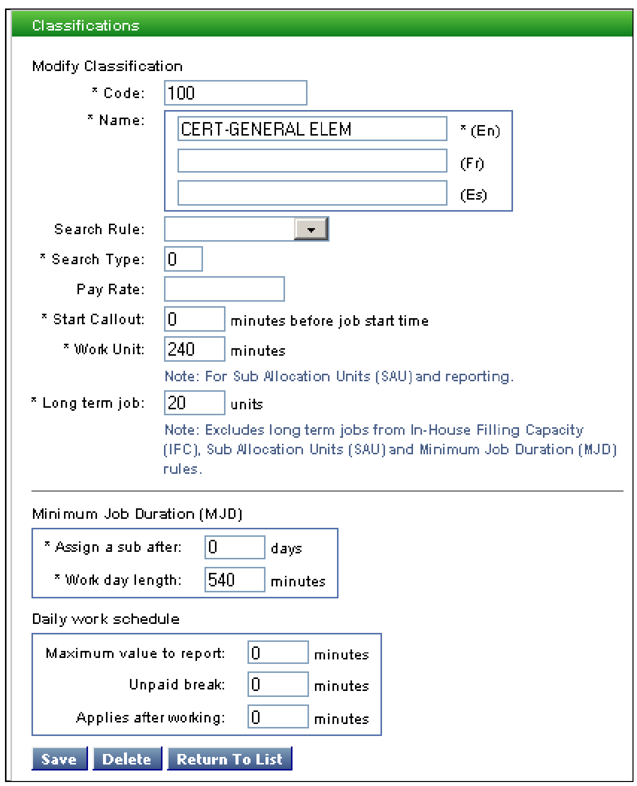
Reasons

On the Reasons screen, click the *Location In-House Filling Capacity* checkbox on all reasons that use this feature.



Classifications

On the Classifications screen, enter values in the *work unit* fields (including the work units for long-term jobs) for all classifications that belong to the search rule that uses In-House Filling.



How Jobs are Processed

When this feature is active at your location, the system processes jobs in the following way:

The system determines that the job will be created and assigned a sub-status of "No Substitute Required - IFC" when *all* of the following conditions are met:

- The reason for the job has the *IFC* option enabled (the box is checked).
- The job is not marked "No Substitute Required--MJD" due to the "Minimum Job Days" feature.
- The job is for a search rule that uses IFC.
- The location's Automatic Assignment List is exhausted.
- The absence is not a long-term job.

If the job meets all of the above criteria, the system checks the location's remaining IFC balance for the day(s) of the absence, then:

- If there is sufficient capacity remaining to absorb the absence, the absence is assigned to "Filled In-House."
- If there is not sufficient capacity remaining to absorb the absence, the system creates the absence as an open absence, unless prevented by some other criteria.
- If a multiple-day absence would exceed the location's IFC for any day of the absence, the entire absence is opened for substitutes, unless prevented by some other criteria.

If a job that was created with In-House Filling is cancelled, the next job created will be created as "No Substitute Required – IFC." Jobs that were created after In-House Filling capacity was met are not affected by the cancellation.

Note*: System operators and administrators that have override authorization can override the NSR – IFC and obtain substitutes.*

Using Substitute Allocation Units

This feature allows a location to define its own limit for the number of absences at that location which may be filled by substitutes over a given period. This feature also gives a location the ability to control their budgeted substitute allocation.

Substitutes are assigned to jobs until the total work units for jobs exceed the value specified for each location on a daily, weekly, monthly or yearly basis. Substitute Allocation units apply to both absences and vacancies, but not to long-term jobs. The work units of the job are counted when being applied to the value set for each location.

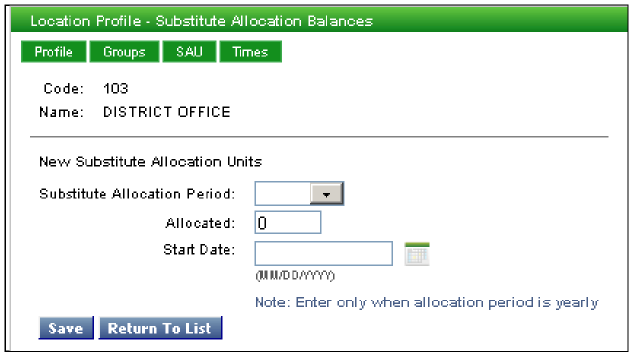
When a location's SAU limit is reached, all additional absences are reported as *No Substitute Required-SAU*. This feature also prevents employees from specifying and prearranging substitutes once the allotment of substitutes is met.

The following system features are used to set up substitute allocation units:

- Location Profile
- Search Rules
- Reasons
- Classifications

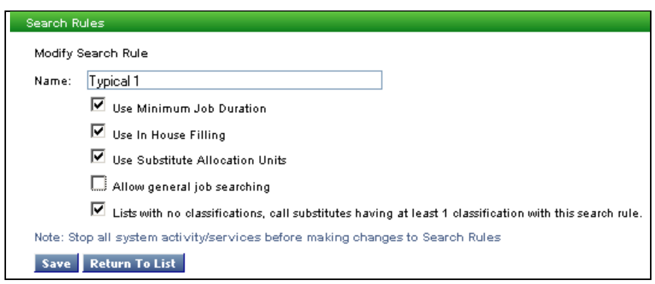
Location Profile

On the Location Profile page, SAU tab, select the *substitute allocation period* for the location. The allocation period can be daily, weekly, monthly, or yearly. In the *Allocated* field, enter a value for the number of work units being allocated. Work units are defined on the Classifications screen. Locations that use the yearly period will have to enter a *start date* for the year.



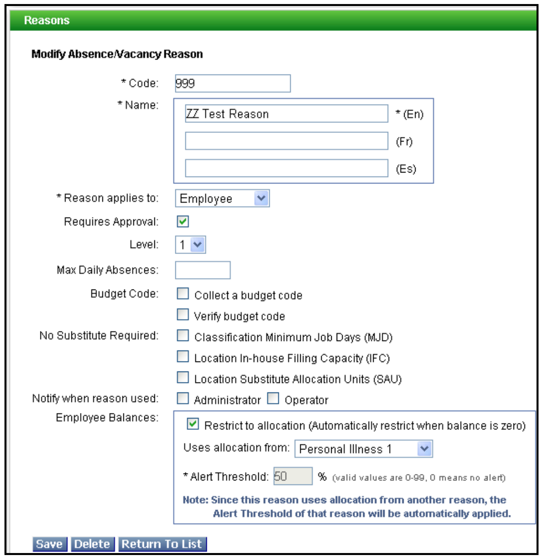
Search Rules

Click the *Use Substitute Allocation* Units checkbox on the search rule to indicate that this feature is being used in the search rule. You may want to set up a search rule only for the classifications that will use Substitute Allocation Units.



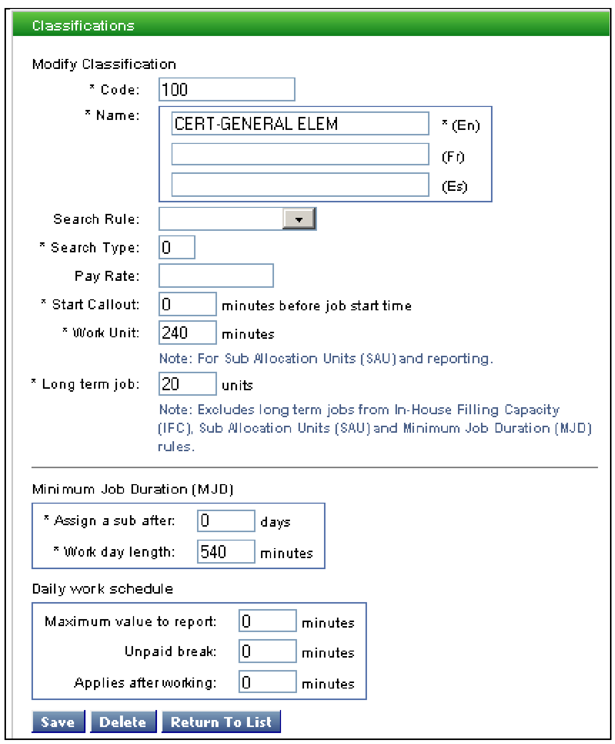
Reasons

Click the *Location Substitute Allocation Units* checkbox on all reasons that use this feature.



Classifications

Enter values in the *work unit* fields (including the work units for long-term jobs) for all classifications that belong to the search rule that uses Substitute Allocation Units.



How Absences are Processed

An absence is subject to the SAU feature if all of the following statements apply to the absence:

- The absence is not a long-term job as determined by parameter settings.
- The absence is not marked as "No Substitute Required" or IFC.
- The job is for a search rule that uses SAU.
- The caller indicates that a substitute is required for the absence.
- There is no substitute available on the Automatic Assignment list at the location of the job.
- The *Location Substitute Allocation Units* field for the reason is enabled.

When an absence which is subject to the Substitute Allocation feature is entered, the system checks whether there are at least as many SAUs remaining for the period(s) of the job as the number of work units the absence will occupy during the period(s):

- If enough SAUs are available for the absence, the system creates an open absence (or specified, or pre-arranged job, as appropriate), and seeks a substitute normally.
- If not enough SAUs are available, the system creates the absence as an "Exceeded SAU" job.

Note: *System operators and administrators that have override authorization can override the NSR – SAU and obtain substitutes.*

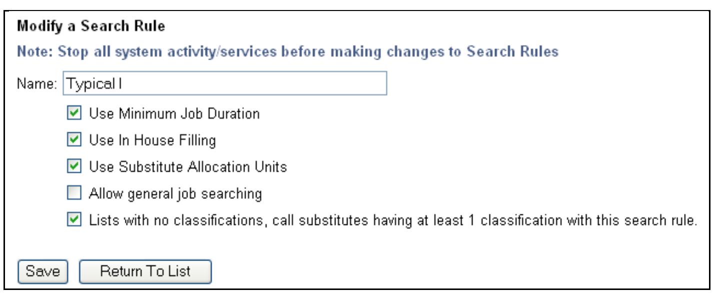
Using Minimum Job Days

Substitutes will not be assigned to jobs unless the duration of the job exceeds the value specified for the classification. All absences including long-term job are considered for this feature. This feature does not apply to vacancies.
The following system features are used to set up minimum job days:

- Search Rules
- Reasons
- Classifications

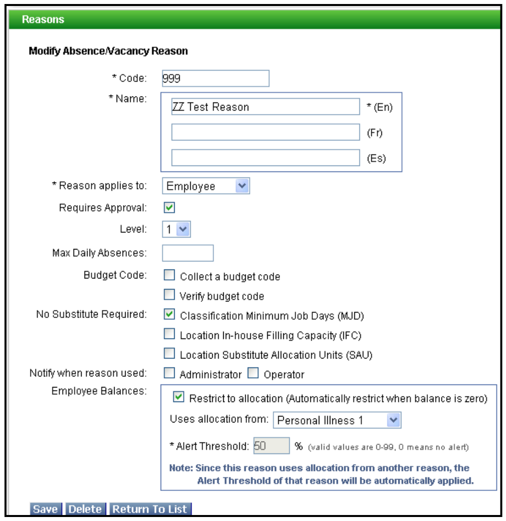
Search Rules

Click the checkbox for *Use Minimum Job Duration* on the search rule to indicate that this feature is being used in the search rule. You may want to set up a search rule only for the classifications that will use Minimum Job Days.



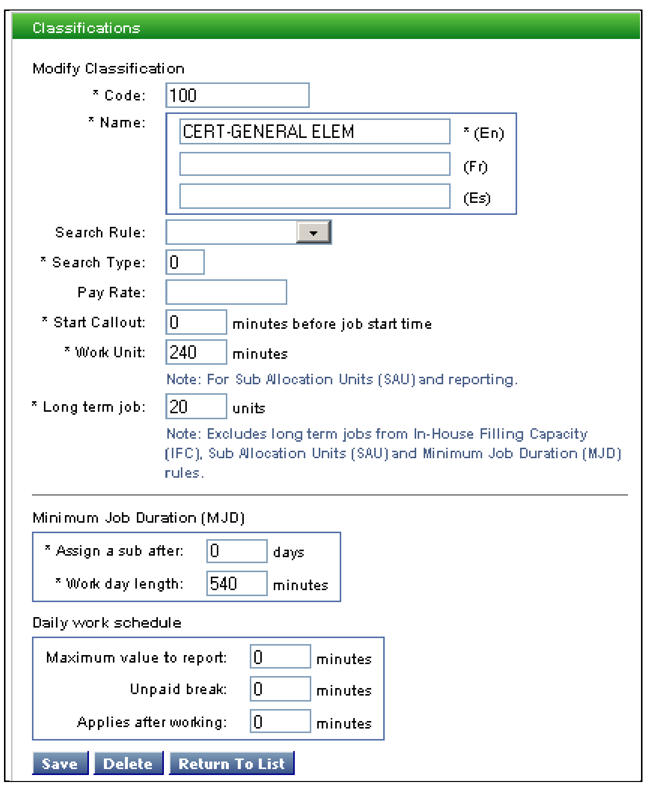
Reasons

Click the *Classification Minimum Job Days (MJD)* checkbox on all reasons that use this feature.
When the MJD box is checked on a reason, the system checks the *Minimum Job Days* field in the classification for the absence to see if a substitute is required.



Classifications

Enter a value in the *minimum job duration* field for the number of days that an employee must be absent before a substitute is required.



How Jobs are Processed

When the MJD box is checked on a reason, the system checks the *Minimum Job Day*s field in the classification for the absence to see if a substitute is required. If the number of days duration of the absence is less than the *minimum job da*ys value, the job is created as “No Substitute Required.” If the number of days duration of the absence is greater than or equal to the *minimum job days* value, two jobs are created; one job is created as “No Substitute Required,” and the second job is created for the days that a substitute is required.

Note: *System operators and administrators that have override authorization can override the NSR – MJD and obtain a substitute.*

Configuring System Features to Limit Employee Absences

The system provides you with methods to limit employee absences. The following system features can be used:

- Reason Balances –prevents employees from entering absences once they have used their allocated amount for that reason.

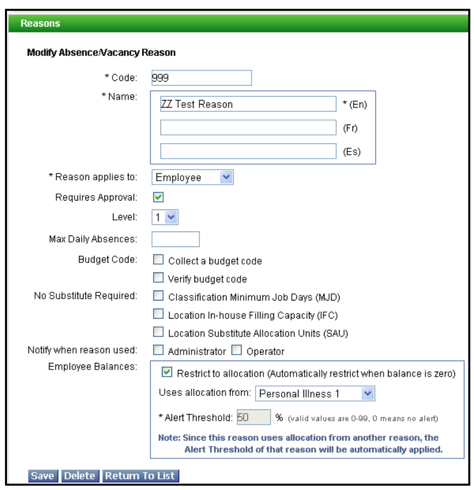
- Maximum Daily Absences – prevents absences or vacancies from being reported once the maximum number district-wide is reached.

Using Reason Balances

Reason Balances prevents employees from entering absences, once they have used their allocated amount for that reason. In order to enter an absence, they would have to use a different reason. Reason balances are counted by minutes and apply to long-term jobs.

Note: *Employees are allocated a reason balance (typically on a yearly basis) in order to limit the number of absences that can be created using a particular absence reason.*

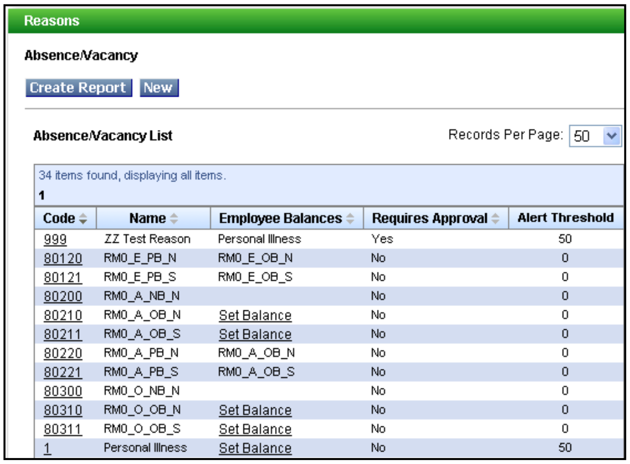
On the Absence/Vacancy Reasons screen, click the *Restrict to allocation (Automatically restrict when balance is 0)* checkbox and enter a reason if the allocated amount is found in a different reason.



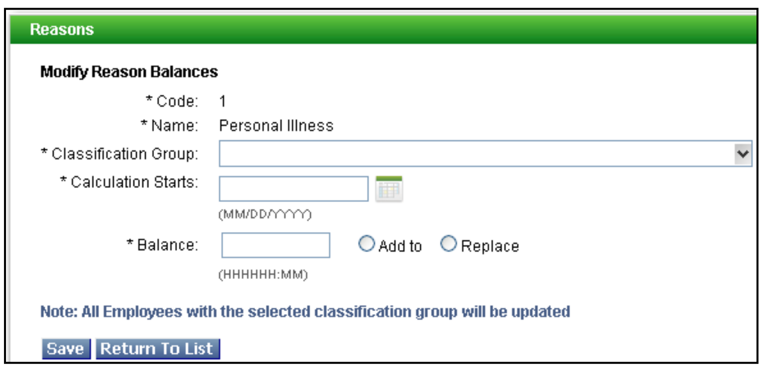
Allocating Amounts to Employees

You can allocate reason balances to a group of employees based on classification group and location group. These groups must already be set up in the system.

On the Absence/Vacancy List screen, click the *Set Balance* link next to the reason you want to allocate to employees.



The Modify Reason Balances screen is displayed.

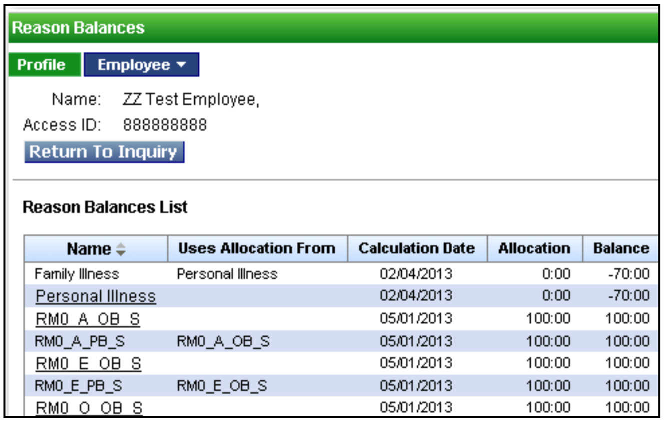


- Select the *Classification Gro*up from the drop-down menu. All employees with the selected classification group will be updated.
- In the *Calculation Starts* field, enter a start date for the calculation. This date determines how many absences should be counted. Use the Calendar icon to select a date, or enter the date in the format shown above the field.
- In the *Balance* field, enter the number of time you want allocated towards this reason for this group of employees. Select the *Add to* or *Replace* option.

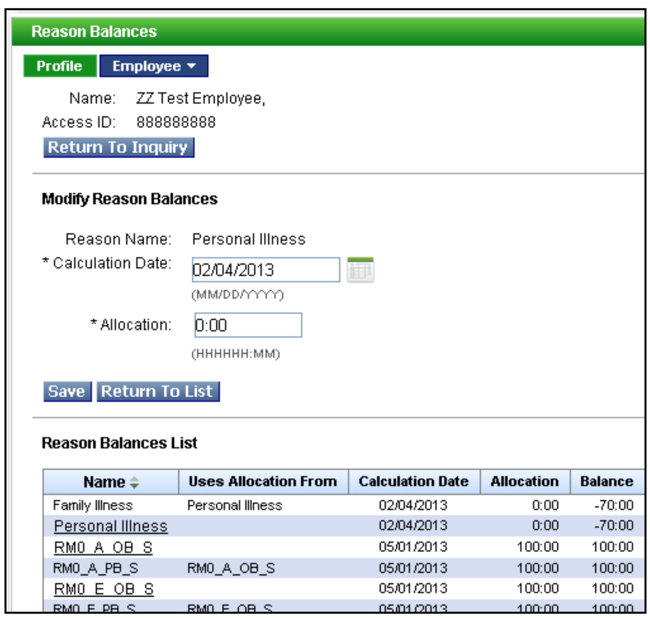
Click Save to update the employee records.

Allocating Amounts to Individual Employees

You can also allocate amounts to individual employees. The *Reason Balances* tab of the employee profile lists the employee's reasons and reason balances. The Reason Balance List can be sorted by Code or Name by clicking on the up/down arrow in that column.



To modify a Reason, click on the Reason name. Update the desired fields and click *Save*.



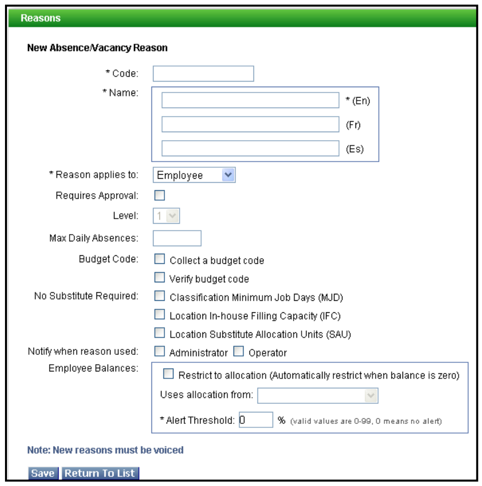
Using Maximum Daily Absences

Maximum Daily Absences applies to all absences and vacancies for the district regardless of the type of employee. Long-term jobs are included when determining the job count for the day.

Reasons

On the Absence/Vacancy Reasons screen, enter a limit for the maximum number of same-day absences or vacancies that may be reported for this reason district-wide in the *Max Daily Absences* field. Each reason's maximum daily absences limit is determined by the value entered in this field:

- If the *Max Daily Absences* field is set to a non-zero number, the system allows no more than the entered number of same-day absences for the given reason.
- If the *Max Daily Absences* field is set to “0,” the system does not set a limit. The feature is not used.



When the limit for the reason is reached for a particular day, the system refuses to accept any more absences and vacancies for that day and reason. Another reason must be selected.

Note: *When calculating the number of absences for a given day, partial-day absences are counted as if they were whole day absences.*

Job Searching Methods for Substitutes

Substitutes will see/hear jobs if they are on the same list, sub list and level set on the job. Only the IVR moves the job to a new list, sub list, and level. This method ensures that the most qualified substitutes are offered jobs before the less qualified substitutes as determined by search rules. A list is defined as a step in the search rule. The chart on the following page describes the lists and how the sub list and level are determined.

When a job is created, it is immediately advanced to the first list, sub list, and level that have substitutes on it. Substitutes on this list can immediately see the job. No other substitute can hear/see the job until the IVR moves to a new list, sub list and level during callout times. The lowest ordered sub list and level within each sub list is processed in order.
For example:

List	Sub List	Level
Preferred List – Employee - No Classification	1	1
	1	2
	2	1
	3	1

If there are many substitutes on the same list, sub list, and level, they will all be able to see and accept the job on the Web, while the telephone offers the jobs one at a time, cycling through the list. The search type determines who is called first.

IVR is offering a job to a substitute:

The IVR "locks" the job:

- Substitute calling (telephone) to search for jobs will **not** hear this job.
- Substitutes using the Web to search for jobs will see the job. They will **not** be allowed to accept it. Depending on when the job was locked, substitutes will either not see the *Accept* button or they will receive a message informing them that the job is not available

A substitute is searching for jobs on the telephone and is hearing a job, while another substitute is viewing/accepting the job on the Web:

- The job is not being offered to a substitute.
- Whoever accepts it first will get the job. The other substitute will receive a message informing them that the job is no longer available.

Two (or more) substitutes are searching for jobs at the same time on the Web and accept at the same time:

- Whoever accepts it first (in milliseconds) will get the job. The other substitute will receive a message informing them that the job is no longer available.

General Job Searching

Searching for jobs can be affected by the parameter that enables "General job searching" setup on the Search Rule.

- If this parameter is enabled, any substitute that qualifies on any list, sub list, and level of the job can hear/view the job and accept the job (if the job is not locked by the IVR). The telephone will still call in the order specified in the search rule.

The following table shows how lists, sub lists, and levels are defined and used in search rules.

List	Description	Sub List and Level
Auto Assignment	Substitutes will be automatically assigned to the job without a telephone call. Typically, these are permanent substitutes always assigned to a school and on a paid salary.	Defined by Priority List
Specified	A substitute can be specified on job creation.	N/A
Preferred – Employee	Preferred list of substitutes for an employee (Classification) specific/not specific)	Defined by Priority List
Preferred – Location	Preferred list of substitutes for a location or location group (Classification specific/not specific)	Defined by Priority List
Custom List – Employee	Custom list of substitutes for an employee (Classification specific/not specific)	Defined by Priority List
Custom List – Location	Custom list of substitutes for a location or location group (Classification specific/not specific)	Defined by Priority List
Classification List	Substitutes will work at the location and classification of the job	Defined by the Location and Classification tab. Sub list is not applicable. Level is the classification level. If there is no level found, the level is used from the Optional Information tab.
General Location List	Substitutes will work at the location of the job	Defined by the Location tab. Sub list is not applicable. The level is used from the Optional Information tab.
General Classification List	Substitutes will work at the classification of the job	Defined by Classification tab. Sub list is not applicable. Level is the classification level. If there is no level found, the level is used from the Optional Information tab.
Any Substitute List	Substitutes are offered jobs regardless of location and classification or priority list setup	Sub list is not applicable. The level is used from the Optional Information tab.

Appendix A: PRI Error Message Descriptions

This section provides descriptions for PRI error messages that may appear in the System Activity Log.

PRI Error Message	Description
Interworking Unspecified	Long distance 1 required on this number, or not a long distance number.
Unspecified Cause	Subscriber not accepting calls. Using the phone to block the system. Operator should talk to the user to set a schedule in SmartFindExpress so the system does not spend time trying to call someone who is not going to answer.
Call Has Been Rejected	Subscriber not accepting calls. Using the phone to block the system. Operator should talk to the user to set a schedule in SmartFindExpress so the system does not spend time trying to call someone who is not going to answer.
Normal Clearing Operator Intercept	Operator Intercept message from D channel. Callback number should be called and checked by Operator.
Voice Channel Operator Intercept	Operator Intercept message from B channel. Message played to system on the audio of the call is most likely voicemail.
Resource Unavailable	Phone company issue with route. Newer technology in the central office switch at the phone company did not get the most recent software push. Open a case with the phone company to have them resolve the issue with placing a call to this number.
No Circuit Available	Phone company issue. The substitute’s callback number circuit is down (all circuits are busy when dialing the destination number). Open a case with the phone company to have them resolve the issue with placing a call to this number.
Invalid Number Format	Bogus phone number in the substitute’s callback number field or the call is being rejected by the phone company. If a valid phone number, contact phone company to resolve.
Requested Circuit/Channel Not Available	Open a case with the phone company to have them resolve the issue.
Service or Option Not Implemented	No long distance on phone service. Contact phone company to resolve.
Event Was Unexpected. Current State: <x> Event: <x>	Common Event Codes found in the System Event Log for Unexpected Events. These are unexpected errors when placing calls over the PRI. This can happen at any time if the call does not follow the programming of the system. If the switch sends us messages we are not expecting in our call flow, or the circuit drops during a call, then Dialogic CCAPI event codes are provided to tell you where the call was at the time of the error.
Temporary Failure	A temporary network failure at the physical layer on the ISDN (PRI) network has occurred. Can be one of the following: The failure of channel negotiation with the remote interface, a data link layer malfunction has occurred locally or at the remote network interface, or T call is being cleared as a result of one or more protocol errors at the remote network interface