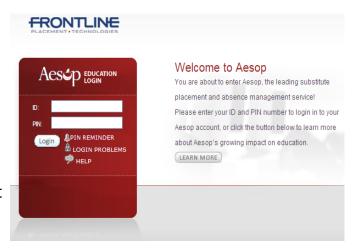
Aesop QuickStart User Guide for Principals

This guide will show you how to:

- Log on to the Aesop system
- View absences
- View substitute assignments
- View unfilled absences
- View available substitutes
- Assign a substitute to an absence
- Enter an absence for an employee
- Modify/Remove an absence
- Modify your School Preference List
- Understand Percent Visibility
- View call history
- View Employee Register
- Approve Employee Absence Requests
- Make voice recordings for your employees for use with the Aesop Phone System

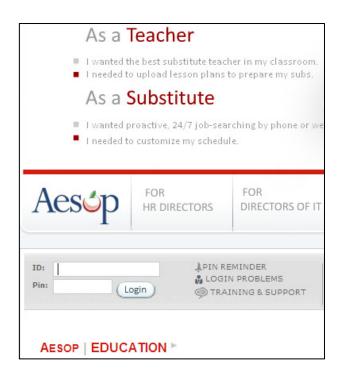


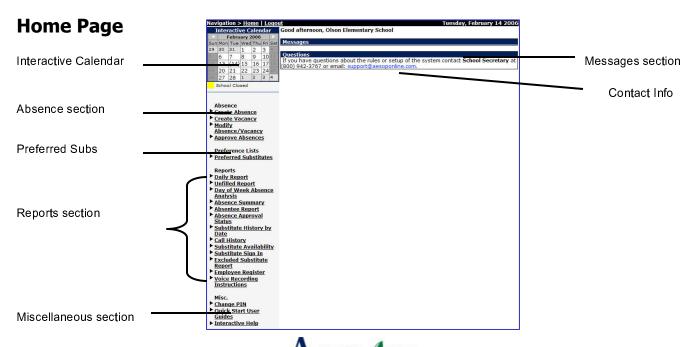


Log on to Aesop

In your Internet browser address bar enter: **www.aesoponline.com** and click **Go** button.

Enter your school's ID and Pin numbers or your Campus User ID and Pin. These would have been given to you by the Aesop administrator at your district.







Messages section

Messages

Any messages from the district office will appear in the Messages section.

Contact Info

If you have any questions regarding Aesop please contact this individual.

If you have questions about the rules or setup of the system contact **School Secretary** at (800) 942-3767 or email: support@aesoponline.com.

Interactive Calendar

Aesop will display both Closed and In-Service Days for your school district.

Closed – absences entered on these dates will be automatically deleted.

In-Service – absence entered on these dates will be automatically marked as "Sub Not Needed."

Sun	February 2006					
	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	
	6	7	8	9	10	
	13	(14)	15	16	17	18
	20	21	22	23	24	
26	27	28	1	2	3	4
	choc	l Clo	sed			

Miscellaneous Section

You can Change your PIN, have access to all User Guides and the Interactive Help feature.

Misc. Change PIN Quick Start User Guides

► Interactive Help



Absence Section

Creating an Absence

You have the ability to create absences on behalf of your employees.

Click **Create Absence** link.

Absence

- Create Absence
- Create Vacancy
- Modify
 - Absence/Vacancy
- Approve Absences

1. Select the Employee

From the alpha-grouping click on the letter of the employee's last name or use the **Search** box.

Click the name of the employee.







2. Entering an absence

Screen One

- 1. Enter Start Date
- 2. Enter End Date
- 3. Choose Absence Reason Type
 - 4. Choose if a substitute is required
 - 5. Specify Start and End times for the absence (if available)
 - 6. Select a Budget Code for the duration of the absence

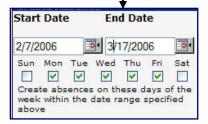
Next> 7. Click the **Next** button



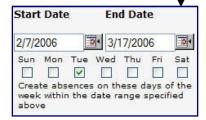
Absence Creation Screen One



Single Day Absence. Enter the Start & End dates; you can disregard the Days of Week boxes.



Long Term Absence. Enter the Start & End dates and leave all days checked.



Recurring Absence. Enter the Start & End dates and click the Day(s) of Week boxes. Example above: every Tuesday for the next six weeks.

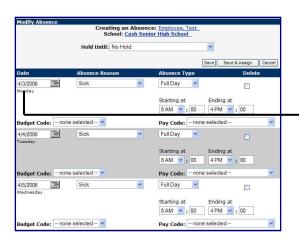
Screen Two

- 1. Review Hold Until option
- 2. Verify all absence information
- 3. **Notes to Substitute** section: notes for the substitute from the employee
- 4. **Notes to Administrator** section: notes viewable only by the principal from the employee
- 5. **Administrator's Notes** section: private notes from the administrator regarding this absence
- 6. Finalize absence
 - 1. Save Aesop will find a substitute
 - Save & Assign you will assign a sub with whom you have pre-arranged the absence.

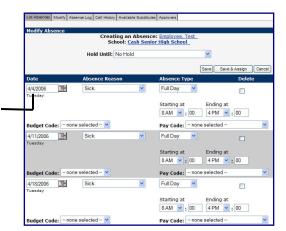


Absence Creation Screen Two. Single Day Absence shown.

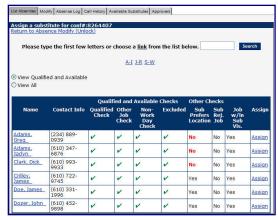




Long Term Absence. Aesop will display the Day of the Week underneath the Date.



Recurring Absence. Aesop will display the Day of the Week underneath the Date.



Assigning sub to absence

3. Assign a Sub to an Absence*

* Find the substitute you wish to assign and click the Assign link

If you cannot find the pre-arranged sub's name:

O View Qualified and Available

View All

- * Click the View All button
- * Aesop will display why the sub is unavailable or not qualified
- * You can override the system by clicking the <u>Assign</u> link

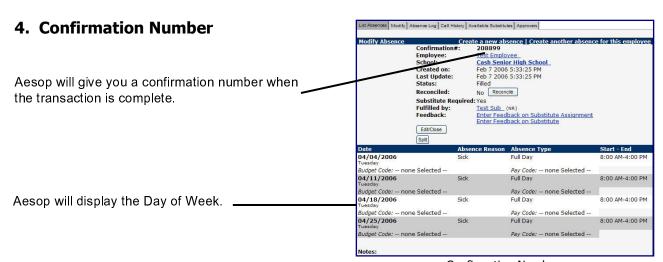


Day of Week displayed

You need to contact the sub

Aesop will not contact a sub if you assign them to the absence. The sub's phone number is conveniently listed after their name.





Confirmation Number

5. Attaching a file

You can attach a file to the absence for the substitute to review. You can attach a Word document or a PDF file.

Click the **Upload New** link.



In the *Upload Files* dialog box select the **File** using the Browse feature and then assign a **Description**.

Click the **Upload** button to load the file.



Upload Files dialog box



File has been successfully saved.

Attachments:

Inapprove Status Status:

Approvers:

Approve Ceny ALL

Approve Ceny ALL

Date Absence Reason Absence Type Start - End

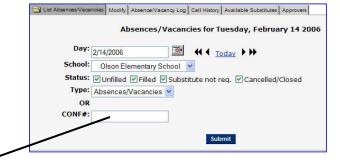
D6/11/2006 Personal Full Day 8:15 AM-4:30 PM

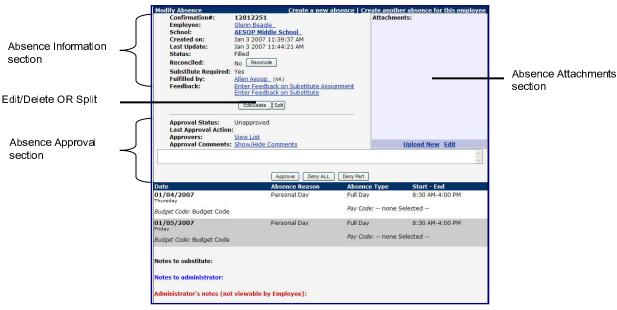
Figure 8.17 Upload Files dialog box

Modify An Absence*

Modify an Absence allows you to assign a sub, delete the absence partially or completely, or change any absence information.

You can search for the absence either by date or enter the **Conf#**.





Modify an Absence Overview (non-Edit mode)

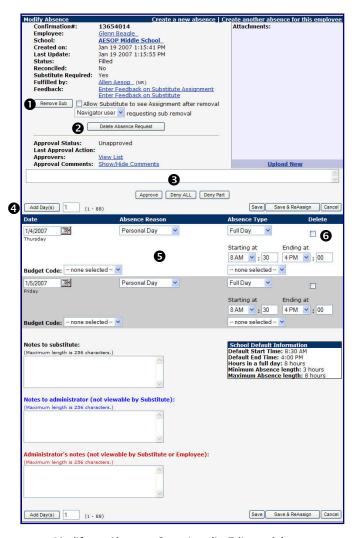


Click the **Edit/Delete(Cancel)** button.

- Remove Sub removes sub from the entire absence. You can select the user who is requesting the sub be removed: Navigator User, School, Substitute, or Employee.
- **O Delete Absence Request** deletes the entire absence request
- **3** Approval Status approve or deny this absence [Chapter 12]
- 4 Add Day(s) add additional days to this absence
- **6** Absence Information you can change any information regarding this absence request
- **6 Delete box** this will remove a single day from the absence request



To leave this absence without saving please click the Cancel button.

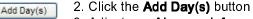


Modify an Absence Overview (in Edit mode)

Adding additional Days



1. Enter the number of additional days in the **Add Day(s)** box



Adjust any **Absence Information** when the additional dates appear



4. Click Save

Update Absence Details

Adjust any **Absence Information** as needed



2. Click Save



Remove Substitute from the entire job

Remove Sub

- 1. Click the **Remove Sub** button
- 2. Select the user who is requesting the sub removal

Save

- 3. When the Windows verification dialog box appears click $\mbox{\bf OK}$
- 4. Click Save.

Remove Substitute from one day of a multiple day absence

You will need to split the absence and then remove the substitute from the job. Please see the **Absence Split** section below.



Remove Sub

Assign Substitute to job*

Assign Sub

- 1. Click the **Assign Sub** button
- 2. Click the alpha-grouping or type in the last name of the sub
- 3. Click Assign.

If the sub's name does not appear



- 1. Click the View All radio button
- 2. Click Assign.

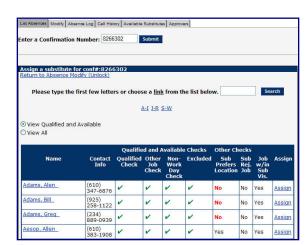


The district has not given the substitute permission to accept jobs at your school.

If you wish to leave

If you wish to leave the Assign Substitute screen
please click Return to Absence Modify (Unlock). If you
do not then the absence will be locked!

Assign a substitute for conf#:8266302 Return to Absence Modify (Unlock)



Assign Sub



Absence Split*

You can split an absence one of two ways:

- 1. Split Individual, or
- 2. Split At



Split Absence

To split an absence:



1. From the Absence Modify screen click Split.



2. Split Individual separates specific day(s) from the original absence. Click all that apply, **OR**



3. Split at: separates days beginning from this point forward.



4. Click the **Split** button to execute the action.

5. Aesop will create a new confirmation number.



Split Absence. New confirmation number created

Absence Log

View all activity for a particular absence.

Research who created the absence, who modified it, and when. Every-thing that has happened to an absence over time is detailed here.



Original Confirmation Absence Log

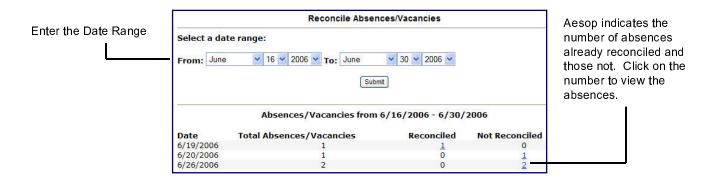


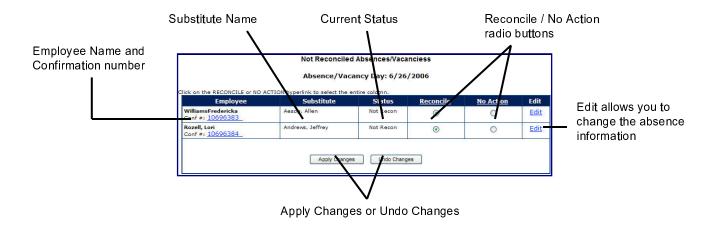
Please note that the substitute will be notified that the absence was split. The substitute will also be notified if they have been removed from an absence if you have configured your settings accordingly.



Reconcile Absences*

You have the ability to reconcile absences as a group rather than reconciling per confirmation number.







Absence/Vacancy Files*

You have the ability to upload files that will be automatically attach to every absence created at your school. You may want to include parking information or anything pertinent to your building.

Unload New Files

File

Description

Active From

Active To

January Schedule 2006.doc

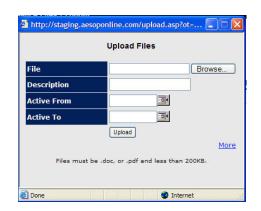
Training Schedule 1006.doc

Training Schedule 1006.doc

Click on the Upload New Files link.

- 1. Using the **Browse** button search for your file.
- 2. Type in a brief **description**
- Select the Active From and To dates
- 4. Click Upload





Preferred Substitutes*

Depending on your districts decision each School may have their own preferred sub list. These individuals will be called first.

To add a new substitute:

The preferred substitute list will either be set up with job visibility in days and hours, like that shown below (subs on this list will have access to jobs 7 days and 0 hours in advance) or your district may have this set up with "Percent Visibility". The concept of "Percent Visibility" is designed to allow substitutes to have access to available assignments at a certain point in time, based on the lead time of the absence.



1. Click the Add New Substitutes link



Click on the alphabet letter representing the desired substitute's last name (or enter substitute's last name into the "Search" box and click the **Search** button)



3. Click the "On List" box to select the substitute



5. Enter days and hours if you wish to override the default visibility (optional)



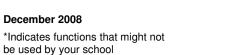
6. Click the **Apply Changes** button to save*

7. Repeat Steps 2-6 for additional substitutes

8. Click the View Current Substitutes link to view your list

*If you do not wish to save the changes click the **Cance**l button.







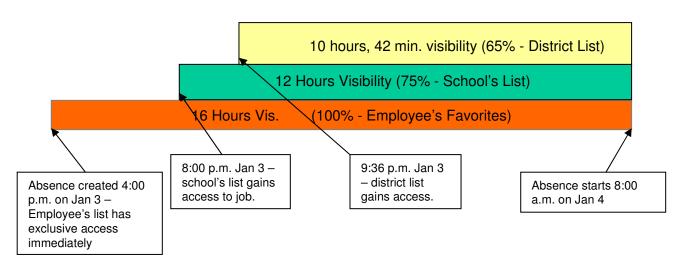
What is the concept of "Percent Visibility" *?

Your list of preferred substitutes will either begin to have access to assignments at your school a certain number of days in advance of the job beginning, or they will begin to have access to jobs for a certain percentage of the "lead time" of the absence, depending on the method that is utilized at your district.

- **1. Best Match** Employee's preferred or "favorite five" substitute.
- 2. Second Best Match School's Preferred substitute.
- **3. Finally** District Level (non-preferred substitute)

Lead Time is a key concept when dealing with this feature. Lead time is calculated as the time difference between when the absence is entered and the time that the absence starts.

Example: "Ellen" the employee creates an absence at 4:00 p.m. on January 3rd, and her absence starts at 8:00 a.m. on January 4th. This gives the system exactly 16 hours and 0 minutes of lead time.



- 1. Ellen's list of favorite or preferred subs would have visibility for 100% of the lead time. The employee's preferred sub would have access to the job beginning at 4:00 p.m. on Jan 3.
- 2. In our example, the school's favorite subs have been configured to see the jobs for only 75% of the lead time. 75% of 16 hours is 12 hours. School's preferred subs would begin to have access to the job at 8:00 p.m., 12 hours before the absence starts.
- 3. District preferred subs have been configured to have access to the job for 65% of the lead time. In this case, they would begin to see the job 10 hours and 24 minutes before it starts, or at 9:36 p.m.

The percentage calculations are all determined by your district's Aesop administrator. For specific information on how your district is setup, please contact your local Aesop contact.



Reports Section

We will briefly review a few of the most commonly used reports.

Report Writer Reports*

Custom reports are created at the district level and accessible at the principal level.

Find the report you wish to run and click the Run with new filters link.



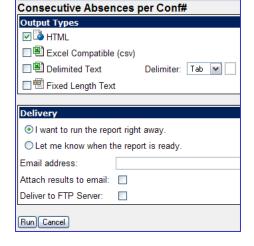
Edit the Filter(s) and then click Run.



You can now choose your Output Type. **HTML** displays the report as if you were viewing a Web site. **Excel Compatible (csv)** allows you to export the report into Excel for further data manipulation.

You also have the option for Aesop to e-mail you the results by entering your e-mail address and clicking the checkbox.

Click Run.





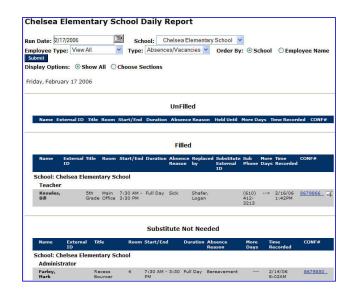
Daily Report

Most widely used report within Aesop. The Daily Report lists all absence information.

Unfilled – absences requiring subs but currently do not have one

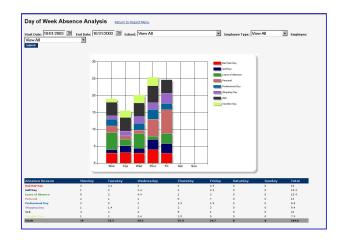
Filled – absences requiring subs and currently are filled

Sub Not Needed – absences that do not require sub replacement



Day of Week Absence Analysis

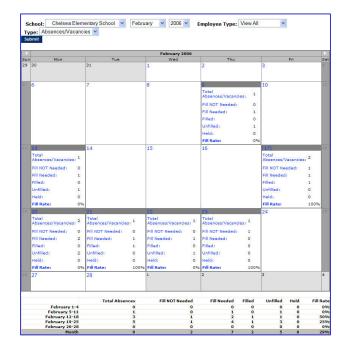
Breaks absences down by day, absence reason and employee. Maximum date range 365 days.





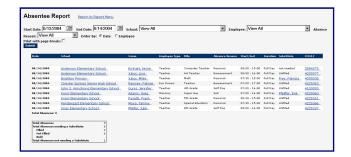
Absence Summary Report

Monthly calendar. Weekly totals at the bottom of report.



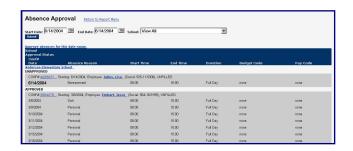
Absentee Report

The same information as the Daily Report except for a date range. If you run the report per school, maximum date range is 92 days. If you run the report for an individual employee maximum date range is 365 days.



Absence Approval

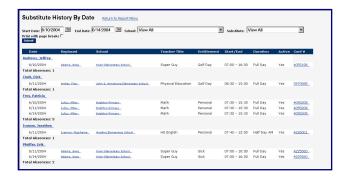
Approve absences via this report by clicking the <u>Approve absences for this date range</u> link at the beginning.





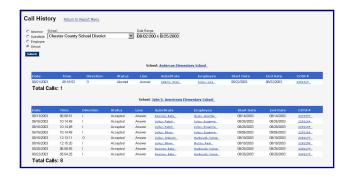
History By Date

Absentee report sorted by Substitute and totaled. Filterable by: Substitute. If you run the report per school maximum date range is 92 days. If you run the report for an individual substitute maximum date range is 365 days.



Call History Report

View all outbound phone calls from Aesop to substitutes, as well as all inbound phone calls to Aesop from substitutes. This report also displays the details of these phone calls.



Substitute Availability Report

You can review the availability of all subs for a specific date. This report also allows you to view all sub skills and whether the sub prefers to work at your school location or not.



Substitute Sign In

Use this report for your substitutes to sign in when they arrive at school.





Substitute Exclusions

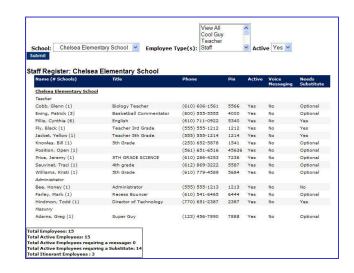
View all substitutes you have excluded from your school.



Employee Register

Register can be broken down by employee types. Sorted by active, inactive or both.

If a teacher forgets their Pin number you can retrieve it from this report.

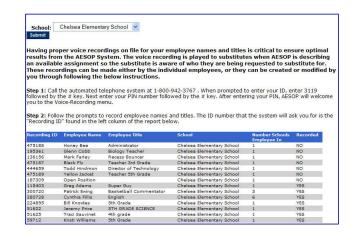


Voice Recording Instructions

You have the ability to voice record your employees name and title. Just follow the phone system instructions and Aesop will prompt you for the **Recording ID** (number at the far left of the name).

Format: first & last name, grade level and subject matter if applicable. Example:

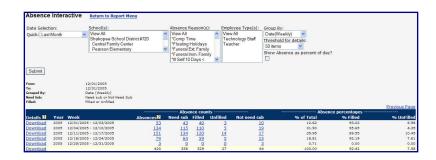
"Joe Doe 1st Grade" or "Joe Doe 8th Grade Social Studies."





Absence Interactive

The Absence Interactive report allows the administrator to pull information and statistics from Aesop for a large date range. This report also offers a variety of ways that the data can be grouped, and also gives the user the ability to download the detailed data to an Excel spreadsheet.



Miscellaneous Section

You can Change your PIN, have access to all User Guides and the Interactive Help feature.

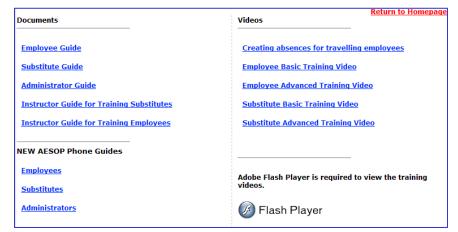
Change Pin

Enter your current Pin then enter the New Pin and retype it. Make sure you tell everyone who uses this Pin you have changed it.



Quick Start User Guides

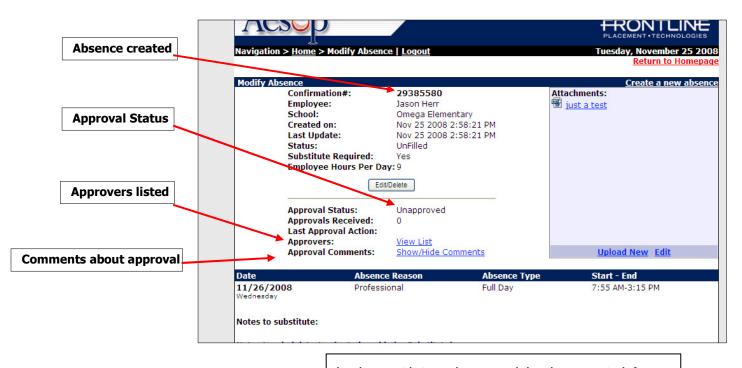
You have the ability to view/print the QuickStart User guides and the phone guides. You also have access to the Aesop Employee and Substitute Training Videos.





Absence Approval Process

- Absence is created by the employee for an absence reason which requires approval
- 2. IF - there is a HOLD UNTIL APPROVED setting - then the absence WILL NOT be shown to substitutes until it has been approved.
- 3. The Administrator who is responsible for approving the absence will get an email
- 4. Administrator logs in to website - can click to Approve one or more absences
- 5. Employee can receive an email when the absence has been approved
- 6. If another Level of Approval has been created the process would continue



Administrator receives an email.

An absence that needs approval has been created for Jason Herr (Math). Starting: 11/26/2008

Number of absences: 1 Requires Substitute: Yes

Click here to view this absence:

http://www.aesoponline.com/login.asp?

location=absenceModify.asp?TB=TAB6%26TB2=%26absr id= 29385580

Click here to view a list of absences needing approval:

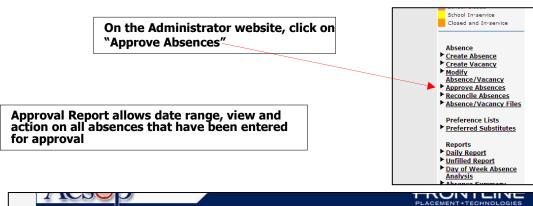
http://www.aesoponline.com/login.asp?

location=abs ApproveList.asp?%26startdate=%26enddate= 11/26/2008%26status=0,%202

Please do not reply to this system generated message. If you need help or have additional questions, please send an email to mailto:ben825@juno.com.

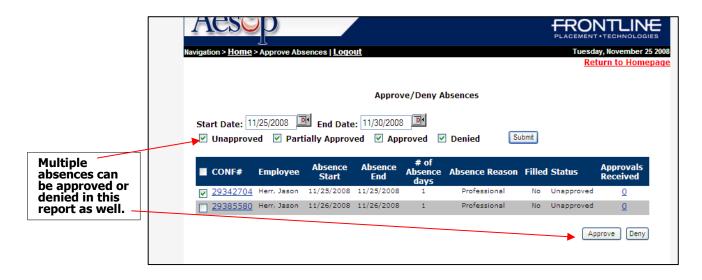
Thank you for using the substitute assignment system. Powered by AESOP.



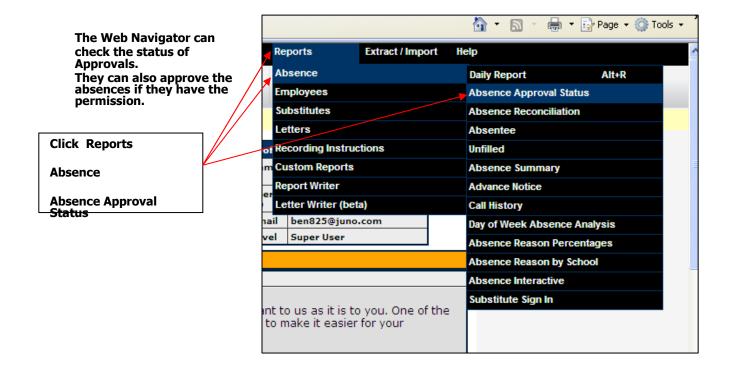




Check the box on the left and click "Approve" or "Deny" - when an absence is Denied - the absence is deleted but is still visible for review.







The Web Navigator is able to view the Status on all of the Approvals.



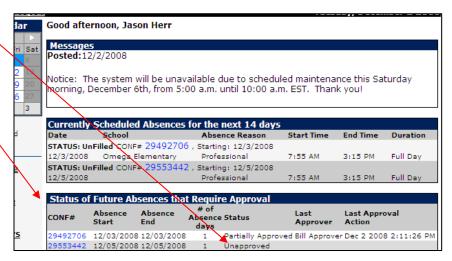


The Employee side of Approvals

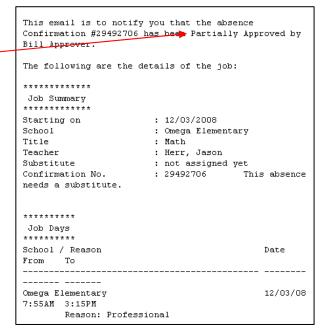
Employee Creates an Absence that needs Approval -

The Administrator Approves or Denies the Absence

Employee can check the Status of the absence at their website

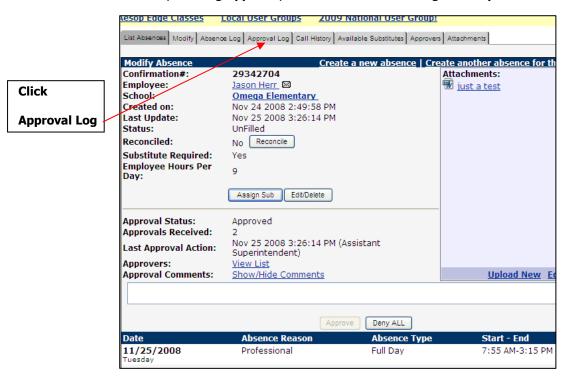


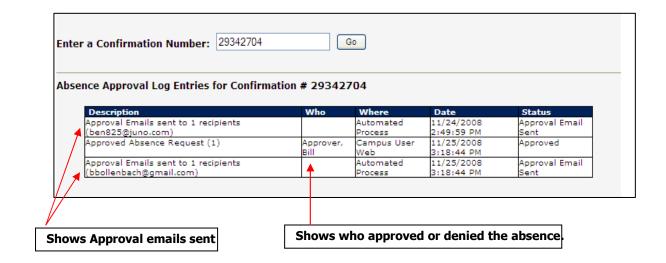
Employee can get an email when the absence is approved — even when it is Partially Approved.





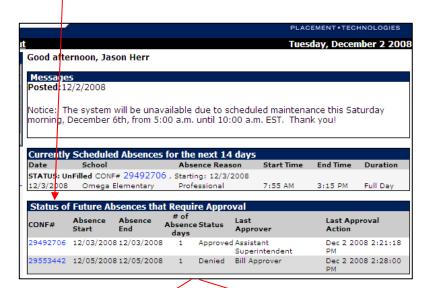
An individual Absence, needing Approval, will also contain the "Log" of the process.







Once the absence is approved or denied by the next approver – that status appears to the employee in their webpage and email.



This email is to notify you that the absence Confirmation #29492706 has been Approved by Assistant Superintendent. The following are the details of the job: * * * * * * * * * * * * * Job Summary * * * * * * * * * * * * * Starting on : 12/03/2008 School : Omega Elementary Title : Math Teacher : Herr, Jason Substitute : not assigned yet This absence Confirmation No. : 29492706 needs a substitute. ***** Job Days ****** School / Reason Date From To 12/03/08 Omega Elementary 7:55AM 3:15PM Reason: Professional

This email is to notify you that the absence Confirmation #29553442 has been Denied by Bill Approver. The following are the details of the job: Job Summary ****** : 12/05/2008 Starting on School : Omega Elementary : Math Title Teacher : Herr, Jason Substitute : not assigned yet Confirmation No. : 29553442 This absence needs a substitute. ******* Job Days ****** School / Reason From To Omega Elementary 12/05/08 7:55AM 3:15PM Reason: Professional

