



SmartFindExpress

Administrator User Guide

Version 2.0.5

December 2011



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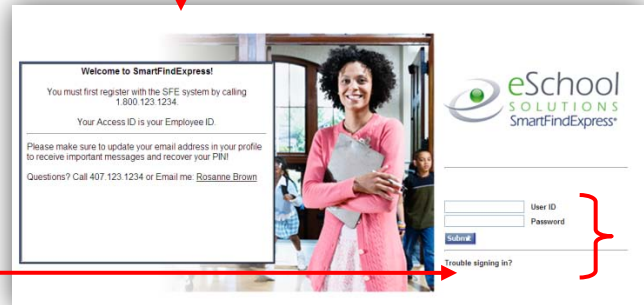
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NOTE: Refer to the System Administrator User Guide for more detailed information on all of the Administrator features in the system.

Logging into SmartFindExpress

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

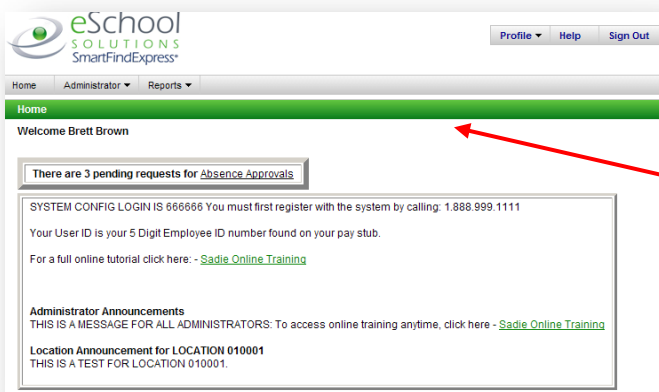
District-wide Announcements



Enter your User ID and Password



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



From your Home Page you can:

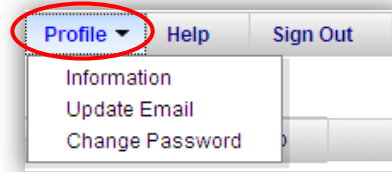
- ✓ Modify Profile Information
- ✓ Get Help While You Work
- ✓ Perform Administrative tasks
- ✓ Create, access and run reports

Managing Profile Information

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

View Profile Information

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



Change Phone or Web Password

1. To change your Phone Password, click the Phone Password option. Type in your current password and your new password. You can enter up to 9 digits. Click Save.
2. To change your Web Password, click the Web Password option. The web password is alphanumeric. Type in your current password and your new password. Click Save.

A screenshot of a 'Change Password' form. The form has a green header with the text 'Change Password'. Below the header, there are two radio buttons: 'Phone Password (PIN)' (which is selected) and 'Web Password'. Below the radio buttons, there are three input fields: 'Current:', 'New:', and 'Confirm New:'. The 'New:' field has a red arrow pointing to it from the right, and the text 'Numeric up to 9 digits' is displayed below it. A 'Save' button is located at the bottom left of the form.

Change Phone Password (PIN) or Web Password

Help

Getting Help While You Work

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

Sign Out

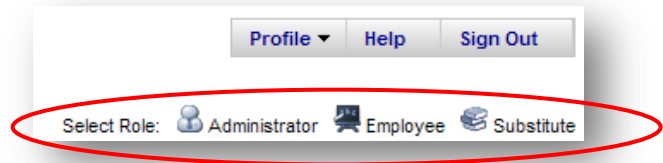
Exiting the System

Click the Sign Out tab to exit the system.

Select Role

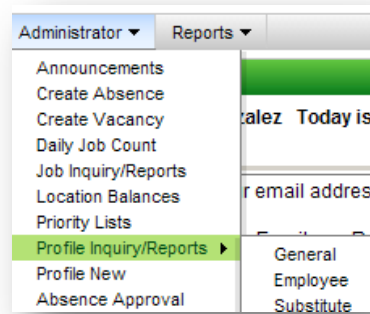
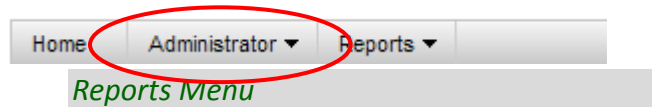
Change User Role

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

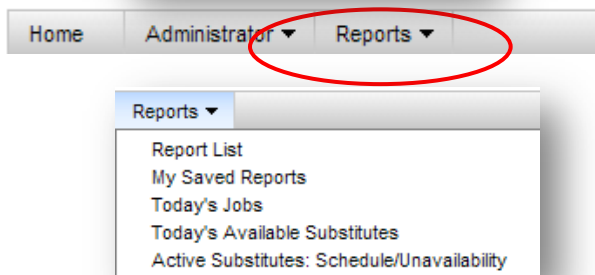


Administrator Menu

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



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

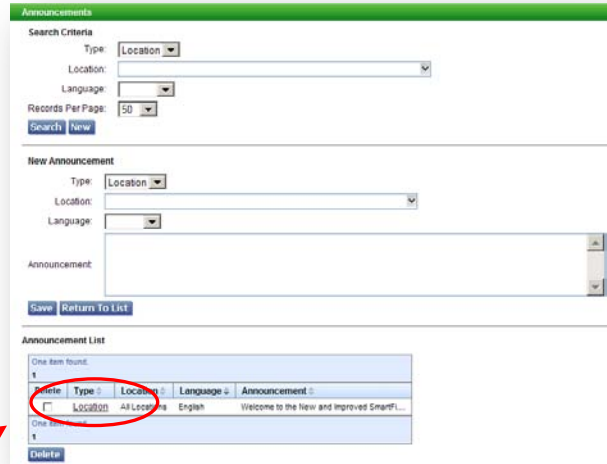


Announcements

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

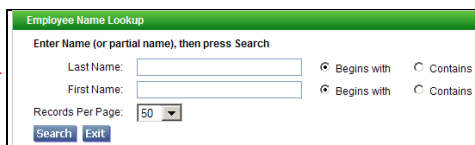
Carriage returns can be used when entering the text to start a new line. HTML tags can be used to create bold, underline and italics text.

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

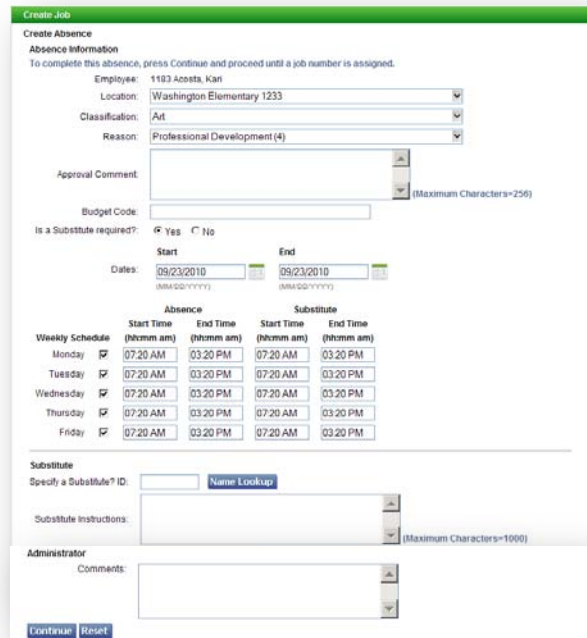


Create Absence

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



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



4. Select a reason for the absence from the drop down menu.
5. Budget Code – will default to school system default budget codes.
6. Enter the dates for the absence if different from today's date.
7. The employee's weekly schedule is displayed. Make any modifications to the schedule times and/or days. Uncheck days that do not apply to the absence. Multiple-day jobs can have different start and end times.

8. Add any instructions for the substitute. Please state in "Special Instructions i.e., grade level, length of day, if you work at different locations other than school listed, supervision duties, school trips etc. The instructions are also voiced to substitutes over the phone. The System only allows 60 seconds of recording.
9. Add Administrator comments on the absence. These are for Administrative use only! The comments can only be viewed by Administrators.
10. Click Continue to confirm the job.
11. On the Create Absence Confirmation page, verify that the absence information is correct and then click Create Absence to create the job or Cancel to return to the Job Create form.

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

Create Job Job Creation - Successful.

Create Absence Verification

Job Number: 24380
 Job Status: Open/Open
 Employee: Acosta, Kari
 Location: Washington Elementary
 Classification: Art
 Reason: Professional Development (4)
 Approval Comment: None
 Budget Code: 111111
 Voice Instructions: None
 Text Instructions: None
 File Attachments: None
 Dates: 09/24/2010 - 09/24/2010
 Weekly Schedule: Employee Substitue
 Friday 07:20 AM - 03:20 PM 07:20 AM - 03:20 PM
 Specified Substitute:
 Assigned Substitute:

[New Absence](#) [Same Employee](#) [Same Date/Reason](#)

Create Vacancy

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

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

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

Create Job

Create Vacancy

Vacancy Information

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

Calendar: All Locations
 Location: ZZ TEST LOCATION 99999
 Classification: ZZ Test Classification 999
 Reason: Sick Leave (1)

Dates: Start 09/24/2010 End 09/24/2010
(MM/DD/YYYY) (MM/DD/YYYY)

Substitute Times: Start 07:30 AM End 03:30 PM Unpaid Break 30 minutes
(HH:MM:SS) (HH:MM:SS) (HH:MM:SS)

REPORTING MULTIPLE DAYS?
 If the days are non-consecutive or if every day of the vacancy does not start and end at the same time, press Modify Times.

[Modify Times](#)

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

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

Has the substitute accepted this job? Yes No

Substitute Instructions: (Maximum Characters=1000)

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

Administrator:

Comments:

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

5. The Reason pull-down menu displays absence/vacancy reason.
6. A Budget Code field may display *and will default to system default budget codes.*
7. The default for entry of a vacancy is today's date. To edit the dates, click the Calendar icon to display the calendar, or type in the new dates in the specified format.
8. The Substitute Times defaults to the location times. To edit the times, all four digits of the time must be entered in hh:mm am or pm format.
9. The amount of unpaid break time in minutes (i.e., lunch) for this Classification. Unpaid Break minutes (such as unpaid lunch breaks) can be optionally configured for Classifications.
10. Click Modify Times if the days are non-consecutive, or if each day of the vacancy has a different start/end time. The Create Vacancy - Modify Times screen displays.

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

Calendar: All Locations
 Location: ZZ TEST LOCATION 999999
 Classification: ZZ Test Classification 999
 Reason: Sick Leave (1)

Start: 09/24/2010
 End: 09/24/2010
(MM/DD/YYYY) (MM/DD/YYYY)

Substitute Times: 07:30 AM 03:30 PM 30 minutes
(HH:MM AM) (HH:MM AM)

Unpaid Break: 30 minutes

REPORTING MULTIPLE DAYS?
 If the days are non-consecutive or if every day of the vacancy does not start and end at the same time, press Modify Times.
[Modify Times](#)

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

PRE-ARRANGED?
 If the specified substitute has accepted this assignment and does not need to be contacted, press YES.
 Has the substitute accepted this job? Yes No

Substitute Instructions: (Maximum Characters=1000)

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

Administrator:

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

Uncheck days that do not apply to the vacancy.

Create Job
Create Vacancy - Modify Times
 From: 09/23/2010 - 09/23/2010

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

[Continue](#)

11. Add any instructions for the substitute. Please state in "Special Instructions i.e., grade level, length of day, if you work at different locations other than school listed, supervision duties, school trips etc. The instructions are also voiced to substitutes over the phone. The System only allows 60 seconds of recording.
12. Add Administrator Comments – these are for school tracking purposes only they will not be voiced or viewed by anyone else.
13. Click **Continue** for the next page. If any errors are detected on the form, you will have the opportunity to make corrections.
14. On the Create Vacancy Confirmation page, verify that the absence information is correct and then click **Create Vacancy** to create the job and receive a job number. To modify vacancy information, click Cancel to return to the Create Vacancy form.
15. The Create Vacancy Verification page displays the job number for the vacancy.
16. Click **Create Vacancy** to display the Create Vacancy Verification screen. A job number is created for the vacancy.

Create Job

Create Vacancy Confirmation

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

Job Status: Open/Open
Calendar: All Locations
Location: Sunnyland Elementary
Classification: Art 406
Reason: Jury Duty (5)
Budget Code: None
Voice Instructions: None
Text Instructions: None
File Attachments: None
Dates: 09/24/2010 - 09/24/2010
Weekly Schedule: Friday 08:00 AM - 03:30 PM
Specified Substitute:
Assigned Substitute:

Create Vacancy **Cancel**

Create Job

Create Vacancy Verification

Job Creation - Successful.

Job Number: 24381
Job Status: Open/Open
Calendar: All Locations
Location: Sunnyland Elementary
Classification: Art 406
Reason: Jury Duty (5)
Budget Code: None
Voice Instructions: None
Text Instructions: None
File Attachments: None
Dates: 09/24/2010 - 09/24/2010
Weekly Schedule: Friday 08:00 AM - 03:30 PM
Specified Substitute:
Assigned Substitute:

New Vacancy **Retain Job Data**

Daily Job Counts

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

Daily Job Counts

Search Criteria

Month: Year:

Reason:

Location:

Search

Previous Month:

September 2010

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

Job Inquiry/Reports

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

Job Inquiry

Search Criteria

Enter Job #:

OR

Job Type: All Absences Vacancies

Job Status:

Sub Status:

Search from: Search to:

(MM/DD/YYYY) (MM/DD/YYYY)

Sort Order: Then by:

Records Per Page:

Job Inquiry

Search Criteria

Enter Job #:

OR

Job Type: All Absences Vacancies

Job Status:

Sub Status:

Search from: Search to:

(MM/DD/YYYY) (MM/DD/YYYY)

Classification:

Classification Group:

Location:

Location Group:

Reason:

Employee Access ID:

Substitute Access ID:

Budget Code:

Reported Date:

Assigned On:

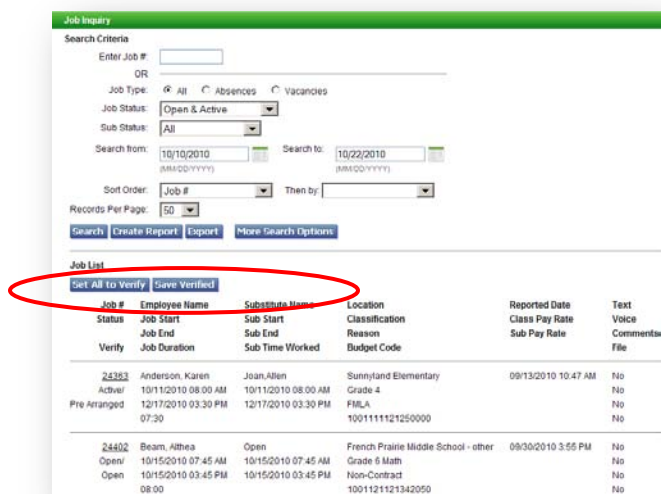
Job with minimum # days duration:

Sort Order: Then by:

Records Per Page:

Job Status	Description
Open	Jobs that occur today, or in the future, and are not filled.
Active	Jobs that occur today, or in the future and have a substitute assigned.
Finished	Jobs that occurred in the past. A job is "finished" when the end time of the job is reached.
Verified	Job detail information has been confirmed as accurate.
Canceled	Jobs that no longer need to be in the system. Can be past, present, or future jobs.
Stopped	Open jobs that have been stopped for callout.
Subsidiary Status	
Open	Job is not currently being offered to a substitute; awaiting callout; no substitute is assigned.
No Sub Required (NSR)	Substitute not assigned because the days were set up in the calendar as NSR days.
Filled	A substitute has been assigned to the job.
Not Filled	The system has reached the end of the search rule for the classification of the job and no substitute is assigned.
NSR(various)	NSR – User Request -Substitute not assigned because the employee indicated that a substitute is not required for the job. NSR – No Sub Allowed - Substitute not assigned because of the "No Sub Allowed" setting for the employee's classification.
Admin Assigned	Job assigned to a substitute from the job modification screen.
Telephone - Assigned	Substitute assigned to the job when the IVR called the substitute to offer the job.

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



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

10. Click View Report to display the Job Report

#	Status	Employee	Access ID	External ID	Classification	Location	Class PR	Job Start	Job End	Job Hr
	Substitute		Access ID	External ID	Reason		Sub PR	Sub Start	Sub End	Sub Hr
							Level	Reported By	Reported Date	Job Use
03	Active/Pre Arranged	Anderson, Karen Joan, Allen	13 10102	13	Grade 4	Sunland Elementary P.M.A.	1	10/11/2010 08:00 AM 10/11/2010 08:00 AM 09/13/2010 10:47 AM	12/17/2010 03:30 PM 12/17/2010 03:30 PM 09/13/2010 10:47 AM	07.30 162.0
15	Open/Open	Acosta, Karl	1183	1183	Agriculture/Biology	Washington Elementary		10/11/2010 08:00 AM 10/11/2010 08:00 AM	10/11/2010 04:30 PM 10/11/2010 04:30 PM	08.30

Job Report

Report Title:

Primary Sort is on a New Page
Note: Report Sections must be selected for the fields to print

Print Details

- Location
- Classification
- Reason
- Dates/Times
- Filling Method
- Substitute Allocation Units
- Job Time
- Budget Code
- Last Modify date/by
- Reported date/by
- Verified date/by
- Comments

Substitute:

- Name
- Access ID
- External ID
- Time Worked
- Pay Rate
- Level
- Class Pay Rate

Employee:

- Name
- Access ID
- External ID

Print Totals for Primary Sort

Print a signature line

- Totals by Reason
- Totals by Filling Method
- Totals by Budget Codes
- Totals by Job Status

Print Totals at the end of the report

- Totals by Reason
- Totals by Filling Method
- Totals by Budget Codes
- Totals by Job Status

[View Report](#) [Return To List](#)

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

11. The Job Inquiry Export page is displayed.

12. Select the export format and click Run Now.

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

Job Inquiry Export

* Format: Fixed Length

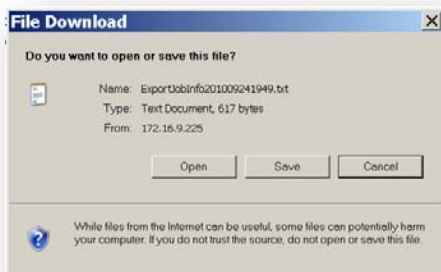
Type: Normal Extended

Delimited

Delimiter:

[Run Now](#) [Return To List](#)

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



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

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

Job List

Set All to Verify Save Verified

Job #	Employee Name	Substitute Name	Location	Reported Date	Text
Status	Job Start	Sub Start	Classification	Class Pay Rate	Voice
Verify	Job End	Sub End	Reason	Sub Pay Rate	Comments
	Job Duration	Sub Time Worked	Budget Code		File
24363	Anderson, Karee	Joan Allen	Sunnyland Elementary	09/13/2010 10:47 AM	No
Active	10/11/2010 08:00 AM	10/11/2010 08:00 AM	Grade 4		No
Pre Arranged	12/17/2010 03:30 PM	12/17/2010 03:30 PM	FMLA		No
	07:30		1001111121250000		No
24402	Beam, Althea	Open	French Prairie Middle School - other	09/20/2010 3:55 PM	No
Open/	10/15/2010 07:45 AM	10/15/2010 07:45 AM	Grade 6 Math		No
Open	10/15/2010 03:45 PM	10/15/2010 03:45 PM	Non-Contract		No
	08:00		1001121121342050		No

Create Report--
Creates a job detail report for the specified job.

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

Job Detail

Job Filling Details

Search Criteria

Job Number: 24363

Display Calls:

Display Disqualified Substitutes:

Records Per Page: 50

Search Create Report Return To Job

Job Filling Details List

Date/Time	Substitute	Step	Order#	Disposition/Description
09/13/2010 10:47:21:0 AM	Joan,Allen	7	5056	Pre Arranged

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

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

Job Detail

Job Number: 24384 Location: Washington Elementary

Status: Open/Open Classification: Agriculture/Biology

Employee: Access, Karl Calendar: All Locations

Access ID: 1193 Search Rule: Teacher Search Rule

Personnel Location

Create Report Filling Details Reset Return To List Save

Changes are not posted until Save is pressed

Class Job: Yes No

Reason: Personal (3)

Budget Code:

Date From: 09/29/2010 To: 09/29/2010

Weekly Schedule:

	Start Time (hh:mm am)	End Time (hh:mm am)	Start Time (hh:mm am)	End Time (hh:mm am)
Monday <input type="checkbox"/>	08:00 AM	04:30 PM	08:00 AM	04:30 PM
Tuesday <input type="checkbox"/>	08:00 AM	04:30 PM	08:00 AM	04:30 PM
Wednesday <input checked="" type="checkbox"/>	08:00 AM	04:30 PM	08:00 AM	04:30 PM
Thursday <input type="checkbox"/>	07:20 AM	03:20 PM	07:20 AM	03:20 PM
Friday <input type="checkbox"/>	07:20 AM	03:20 PM	07:20 AM	03:20 PM

Assigned Substitute

Name: Substitute ID: Name Lookup

Access ID:

Accepted On:

Level:

Pay Rate:

Substitute Pay Rate:

Specified Substitute

Name: Substitute ID: Name Lookup

Access ID:

Last time called:

Text Instructions:

Administrator Comments:

File Attachments: None

Add a File: Browse... (Maximum file size=2048K)

Reported Date: 09/24/2010 04:54 PM Last Modified On:

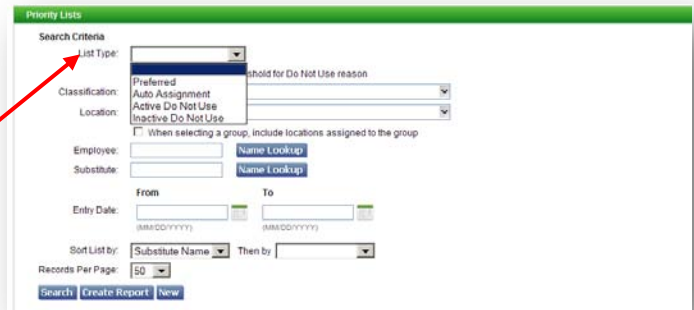
Reported By: Frank, Claire Last Modified By:

Create Report Filling Details Reset Return To List Save

Priority Lists

Priority Lists give substitutes preference over other substitutes and determine the order in which jobs are offered over the phone.

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



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

Profile Inquiry/Reports

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

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



General Profile

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

Employee Profile

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

Employee List

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

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

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

The screenshot shows the 'Employee Report Detail' page. It has three main sections: 'Detail Report', 'Employee List', and 'Employee Labels'. Each section has a 'Report Title' field and a 'View Report' button. The 'Detail Report' section includes checkboxes for 'Primary Sort is on a new page', 'Secondary sort prints on a new page', and various data fields like Name, Address, PIN, etc. The 'Employee List' section has a 'View Report' button circled in red. The 'Employee Labels' section has a 'Label Type' dropdown menu set to 'Avery 5162 (1.33" X 4") 2-up' and a 'View Report' button circled in red.

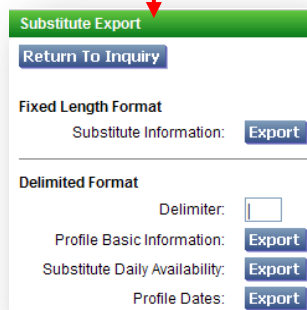
The screenshot shows the 'Employee Export' page. It has two main sections: 'Fixed Length Format' and 'Delimited Format'. The 'Fixed Length Format' section has an 'Employee Information:' label and an 'Export' button. The 'Delimited Format' section has a 'Delimiter:' field and three 'Export' buttons for 'Profile Basic Information', 'Employee Work Schedule', and 'Profile Dates'.

Substitute Profile

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

The screenshot shows the 'Substitute Profile Inquiry' page. It has a 'Search Criteria' section with radio buttons for 'All', 'Active', 'Inactive', 'Registered', 'Avail New Jobs', 'Avail Long Term', 'Certified', 'Avail General Calling', and 'Expired Subs'. There are also date pickers for 'Available On', 'From', and 'To'. At the bottom, there are 'Sort List by' and 'Records Per Page' dropdowns, and buttons for 'Search', 'Create Report', 'Export', and 'More Search Options'.

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

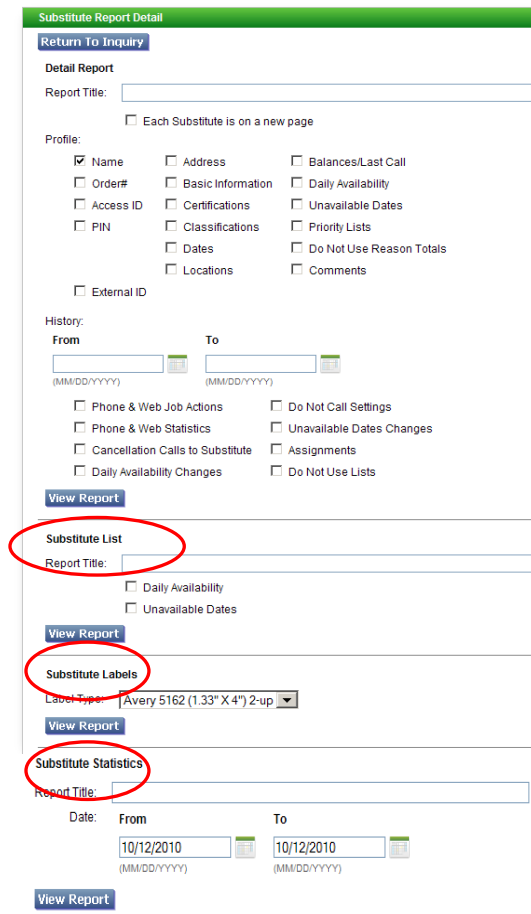


Substitute Export

[Return To Inquiry](#)

Fixed Length Format
Substitute Information: [Export](#)

Delimited Format
Delimiter:
Profile Basic Information: [Export](#)
Substitute Daily Availability: [Export](#)
Profile Dates: [Export](#)



Substitute Report Detail

[Return To Inquiry](#)

Detail Report
Report Title:
 Each Substitute is on a new page

Profile:

<input checked="" type="checkbox"/> Name	<input type="checkbox"/> Address	<input type="checkbox"/> Balances/Last Call
<input type="checkbox"/> Order#	<input type="checkbox"/> Basic Information	<input type="checkbox"/> Daily Availability
<input type="checkbox"/> Access ID	<input type="checkbox"/> Certifications	<input type="checkbox"/> Unavailable Dates
<input type="checkbox"/> PIN	<input type="checkbox"/> Classifications	<input type="checkbox"/> Priority Lists
	<input type="checkbox"/> Dates	<input type="checkbox"/> Do Not Use Reason Totals
	<input type="checkbox"/> Locations	<input type="checkbox"/> Comments
<input type="checkbox"/> External ID		

History:
From: To:
(MM/DD/YYYY) (MM/DD/YYYY)

<input type="checkbox"/> Phone & Web Job Actions	<input type="checkbox"/> Do Not Call Settings
<input type="checkbox"/> Phone & Web Statistics	<input type="checkbox"/> Unavailable Dates Changes
<input type="checkbox"/> Cancellation Calls to Substitute	<input type="checkbox"/> Assignments
<input type="checkbox"/> Daily Availability Changes	<input type="checkbox"/> Do Not Use Lists

[View Report](#)

Substitute List
Report Title:
 Daily Availability
 Unavailable Dates

[View Report](#)

Substitute Labels
Label Type:

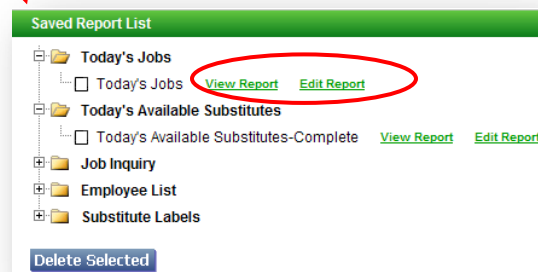
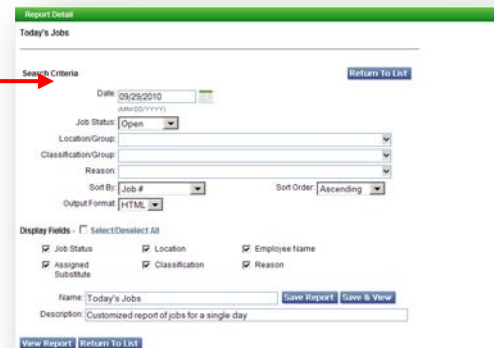
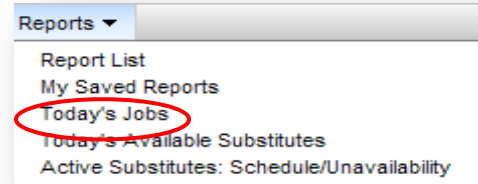
[View Report](#)

Substitute Statistics
Report Title:
Date: From: To:
(MM/DD/YYYY) (MM/DD/YYYY)

[View Report](#)

Reports

1. Click **Report List** to display the list of available reports in the system.
2. Click the link of the report you want to create.
3. The report's setup page is displayed.
4. Select the search criteria to be used for the report and select the information to display on the report from the Display Fields section of the setup page.
5. After entering the report parameters, click **View Report** to view the report, **Save & View** to save and view the report, or **Save Report**. Saved reports display in the "My Saved Reports" folder.
6. To access your saved reports, click the **My Saved Reports** option from the Reports menu. The Saved Report List is displayed.
7. Click the **View Report** link to open the report. In Report view, you can review the contents of the report and export the report data to any of the output format displayed at the top of the report page.
8. Click the **Edit Report** link to edit the report parameters and rerun the report. The report's setup page is displayed. Make any changes to the existing search criteria fields and to the display field selections.
9. To give the report a new name, enter a name in the Name field. You can overwrite the original report by not entering a new report name.
10. Click View Report to view the report, Save & View to save and open the report, or Save Report.

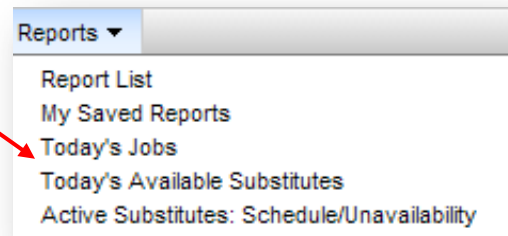


Report data can be exported as a PDF, Excel, Word, or CSV file.



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

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

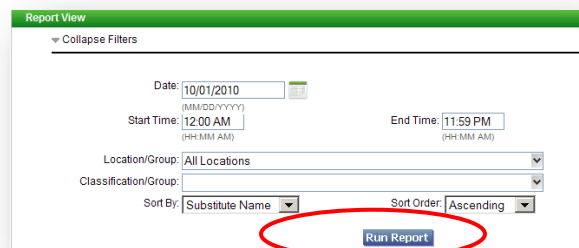


12. The report is automatically generated for your location.

13. To export the report data, click on an export icon at the top of the report page.

14. To apply different filters to the report, and re-run the report, click the Expand Filters link to display the search criteria fields for the report.

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

A screenshot of the 'Report View' page in the application. The page has a green header with the text 'Report View' and a 'Collapse Filters' link. Below the header, there are several input fields for search criteria: 'Date' (10/01/2010), 'Start Time' (12:00 AM), 'End Time' (11:59 PM), 'Location/Group' (All Locations), 'Classification/Group', 'Sort By' (Substitute Name), and 'Sort Order' (Ascending). A red circle highlights the 'Run Report' button at the bottom right of the form.