

Southern Educational Services Cooperative (SESC) Administrator Browser Quick Reference Card

System Phone Number	<u>1-866-938-7559</u>
Help Desk Phone Number	<u>304-872-6440 or 304-872-6441</u>
Write your Access ID here	_____
Write your Password here	_____
Web Browser URL	<u>sesc.sfe.powerschool.com</u>

WEB BROWSER ACCESS INSTRUCTIONS

SIGN IN/Password REMINDER

Open your browser and access the SmartFindExpress Sign In page. Review the messages above the Sign In. Enter your Access ID and Password. Review additional announcements on your home page, if any.

When the *Password Reminder* link is selected, the system displays the Password Reminder Request page. The user's Access ID and the security code being displayed must be entered on this page.

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

PROFILE/SELECT ROLE

Profile: View profile information, update email or change password.

Select Role: For multi-role administrators, click on the desired icon to access another profile. No need to log out of the system and back in again!

COMMUNICATIONS

Note: If activated in profiles> Menu Access, Location Administrator will be able to create announcements.

Choose the *Communication Link*

- Create a new announcement
 - Select *New* button
 - Select the location/group for the announcement (default is your location)
 - Type in the text of the announcement
 - Select *Preview* before adding the announcement
 - Select the *Save* button
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CREATE AN ABSENCE

Choose the *Create an Absence* link

- If activated, select **'Is a Substitute Required'**
- **Enter employee's access ID or use the *Name Lookup* button.**
 - Enter the employee's first or last name (enter full or partial name)
 - Select the *Search* button
 - Select the Employee from the list by choosing the *Name* link
- Select a Location (default is employee's primary location)
 - To select a different location, click the drop-down menu and choose the location
- Select Classification (default is employee's primary classification)
 - To select a different classification, click the drop-down menu and choose the classification
- **Select Reason for this absence from the drop-down menu**
- **Select Start and End Dates for your absence**
 - Enter the dates with forward slashes (MM/DD/YYYY) or use the calendar

- **Select Start and End Times for your absence. Default times are listed**
 - To change defaults, enter the time in HH:MM am or pm format
 - Ensure that the correct time is entered. If the times for the substitute are different than the absence times, please enter the adjusted times
- **Multiple Day (Recurring) Absence.** Select the *Modify Schedule* button
 - The default work schedule is shown. Remove the checkmark(s) from the Work Days boxes that do not apply to this absence
 - Modify daily schedule and/or times for absence and substitute
 - Select the *Continue* button
- If using allowed duration when creating an absence, select Full Day, Morning Half Day, Afternoon Half Day or Custom.
- Request a particular substitute (not always possible with service personnel)
 - Enter the substitute's access ID number or use the *Name Lookup* button to find the substitute by name
- Indicate if the requested substitute has accepted this job
 - Yes = substitute is prearranged and will not be called and offered the job
 - No = call will be placed, and the substitute will be offered the job
- Enter special instructions for the substitute to view
- Enter comments for administrator viewing only
- **Select the Continue button**
- **Select the Create Absence button to receive a Job Number. Please record this Job Number**

CREATE A VACANCY

Choose the *Create Vacancy* link

- **Select Calendar for Vacancy**
- **Select Location for Vacancy**
- **Select Classification for Vacancy**
- **Follow steps in Create an Absence Entry, starting at "Select Reason"**
- **Select the Create Vacancy button to receive a Job Number. Please record this job number**

DAILY JOB COUNTS

Choose the *Daily Job Counts* link. The Daily Job Count allows you to search and view a count of jobs at your location for a month. Past, present and future job counts can be viewed.

- Select Month and Year (defaults to current month and year)
- Select Reason for absence or leave blank for all reasons
- Select Location (default will be your location)
- Select *Search* button

You may search other months by using the Previous Month or Next Month buttons

LOCATION BALANCES

Choose the *Location Balances* link. Location balances allows you to search and view remaining balances for substitute allocation units.

- Select a location
- Select SAU
- Select a date range
- Select *Search* button

JOB INQUIRY/REPORTS

Choose *Job Inquiry/Reports* link. Job Inquiry allows you to search, view and print job reports for your location. Past, present and future jobs may be viewed or modified

Today's Job Inquiry

- Select the *Search* button or *Create Report* button for a list of all jobs for today

Job Inquiry

- **Enter a Job Number or Search criteria for a list of jobs**
Search Criteria
 - Job Types - All (both Absences and Vacancies), Absences and Vacancies
 - Job Status - All, Open & Active, Open, Active, Finished & Verified, Finished, Verified, Cancelled, Approval Pending and Stopped.
 - Sub Status - All, No Sub Required, Filled, Not Filled.
 - Date Range - Defaults to Today. Enter dates or use the calendar icons to select dates
 - Select the *More Search Options* button to expand search criteria options to create a more defined search
 - Select Sort Order
 - Budget Code, Classification Name, Employee Name, End Date, Job # (default), Location Name, Reason Name, Start Date, Job Status, Job Sub-Status, Substitute Name
 - Select "Then By" Sort order (same options as Sort Order)
 - Select the *Search* button to view a list of jobs or select other options
 - *Create Report* creates a printed report of the selected job information. A report setup screens allows a choice for the printing of detailed or summary information
 - *Export* creates a data file of the job information
 - If you pressed the *Search* button, select the *Job Number* link to view or modify details of the job
 - Modify job actions to change the job status including stop callout, re-open, cancel, and verify
 - Modify job information - Details of the job (time, reason, substitute, etc.) can be modified prior to the job ending
 - Select the *Save* button
- Other actions on the job detail screen
- *Filling Details* button – Detailed information regarding all calls and disqualifications for the job
 - *Activity Log* button – Detailed information regarding the system activity.
 - *Audit Log* button – Show the audit trail of the job.
 - *Communication Log* button – View all communications for the job
 - *Reset* button – Return the data to its original state before selecting the *Save* button
 - *Return to List* button – Return to the list that was created by the search

PRIORITY LISTS

Choose the *Priority Lists* link to view, modify, export and print priority lists of substitutes for your location. Substitutes are assigned a list number and level, which determines the order they will be called for jobs. The lowest order is called first.

New Priority List

- Select the *New* button
 - Enter substitute's access ID or use *Name Lookup* button
 - Select List Type from drop-down menu (Preferred or Do Not Use)
 - Select Classification from drop-down menu
 - Select either a location or employee, but not both
 - Enter the sub list and level. (Default is 1)

- Select the *Save* button

Priority Lists Inquiry

- Enter the search criteria or press the *Search* button for all priority lists
 - Select List Type from drop-down menu (Preferred or Do Not Use)
 - Select Classification from drop-down menu
 - Select Location
 - Enter employee's access ID or use *Name Lookup* button
 - Enter substitute's access ID or use *Name Lookup* button
- Select the sort order
 - Select sort by (default Substitute name) and "then by" sort order
- Select the *Create Report* button for a report
 - A report setup screen allows the choice of data to be included on the report
 - Select the *View Report* button
- Select the Export to Excel or Detailed Export
 - Export to Excel will give you an Excel document of all substitutes on priority list selected.
 - Detailed Export will give Priority List import format of all substitutes on priority list selected.
- Select the *Search* button for the search list
 - Modify Priority List
 - Select substitute to modify by selecting the substitute's name
 - Modify substitute list and/or level
 - Select *Save* button
 - Delete Substitute from Priority List
 - Place a checkmark in the Delete box
 - Select the *Delete* button

PROFILE INQUIRY/REPORTS

Choose the *Profile Inquiry/Reports* link to view and/or print a list of Employees and/or Substitutes for your location.

Employee Inquiry Tab

- Enter search criteria or select the *Search* button to return all employees at your location(s)
- Select a profile by clicking the *Name* link
- View basic information on the profile tab
- Select the employee tab and links within the tab for detailed information

Employee Report from the Employee Inquiry Tab

- Enter search criteria or leave blank for all employees at your location(s)
- Select the *Create Report* button
 - Select a report type from the report setup
 - Employee Detail Report
 - Employee Labels
 - Employee List
- Select the *View Report* button

Substitute Inquiry

- Enter search criteria or select the *Search* button to return all substitutes at your location(s)
- Select the *Create Report* button
Note: The Substitute List will give you a quick list with Substitute's Names, IDs and Phone Numbers.
- Select the *View Report* button

ABSENCE APPROVAL

Choose the *Absence Approval* link to search, approve/deny or modify absence approval requests or to create an Absence Approval report.

View Absence Approval Requests

- Enter search criteria or select the Search button to return all absence approval requests
 - Create Report creates a report of the selected absence approval information.
Select report options from the report setup page

Approve/Deny Absence Approval,

- Click in the Select field and then click the Approve or Deny button. To view the history on the specific request, click the *Level* link to display the Absence Approval History page. A comment can be added to the approval request.

SIGN OUT AND WEB BROWSER INFORMATION

At any time during the session, the *Sign Out* link can be selected to end the session and disconnect from SmartFindExpress. Selecting the browser's back button or going to another site on the Internet does not disconnect the session from SmartFindExpress.

To ensure security and privacy of information, use the *Sign Out* link to disconnect from SmartFindExpress, and close the web browser when you finish with your session.

Important Note: Do NOT use the browser's BACK button to navigate to screens.

Navigation buttons are on the bottom of SmartFindExpress screens, such as the Return to List and Continue buttons.