

**SmartFindExpress
Administrator Telephone Quick Reference Card**

System Phone Number **1- (855) 319-3136**

Support Phone Number **(519) 627-6762 ext. 10362**

Access ID: _____

PIN: _____

System Calling Times to Substitutes

Week Day	Today's Jobs	Future Jobs
Weekdays	Starts at 06:00 a.m. Continues until jobs are filled or list of substitutes is exhausted	04:15 p.m. – 09:00 p.m.
Saturday	None	None
Sunday	None	04:15 p.m. – 09:00 p.m.
Holidays	None	04:15 p.m. – 09:00 p.m.

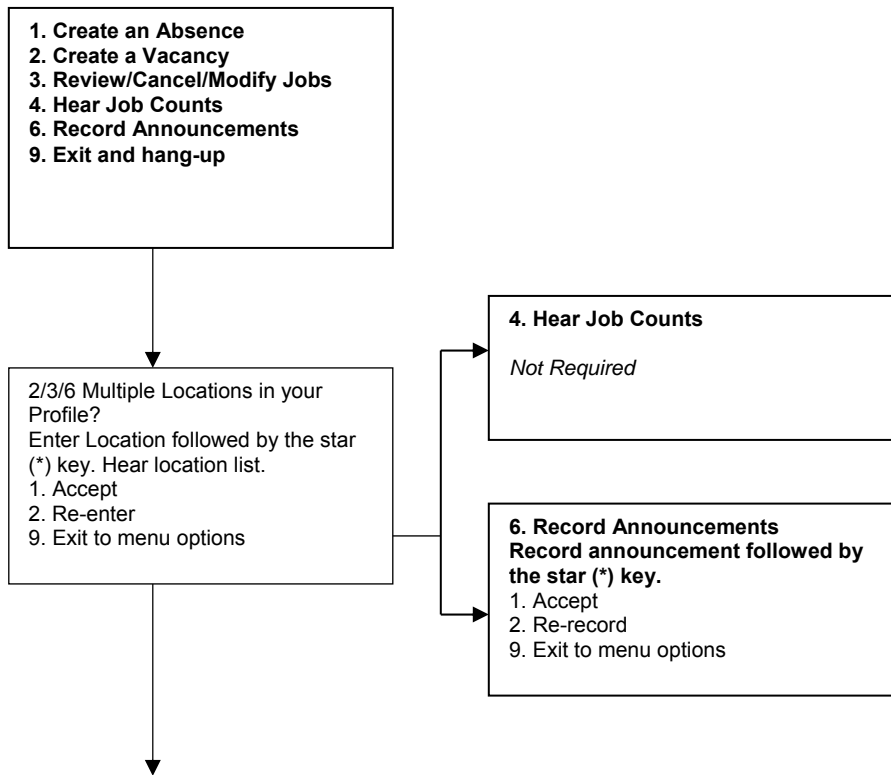
Absence/Vacancy Reasons

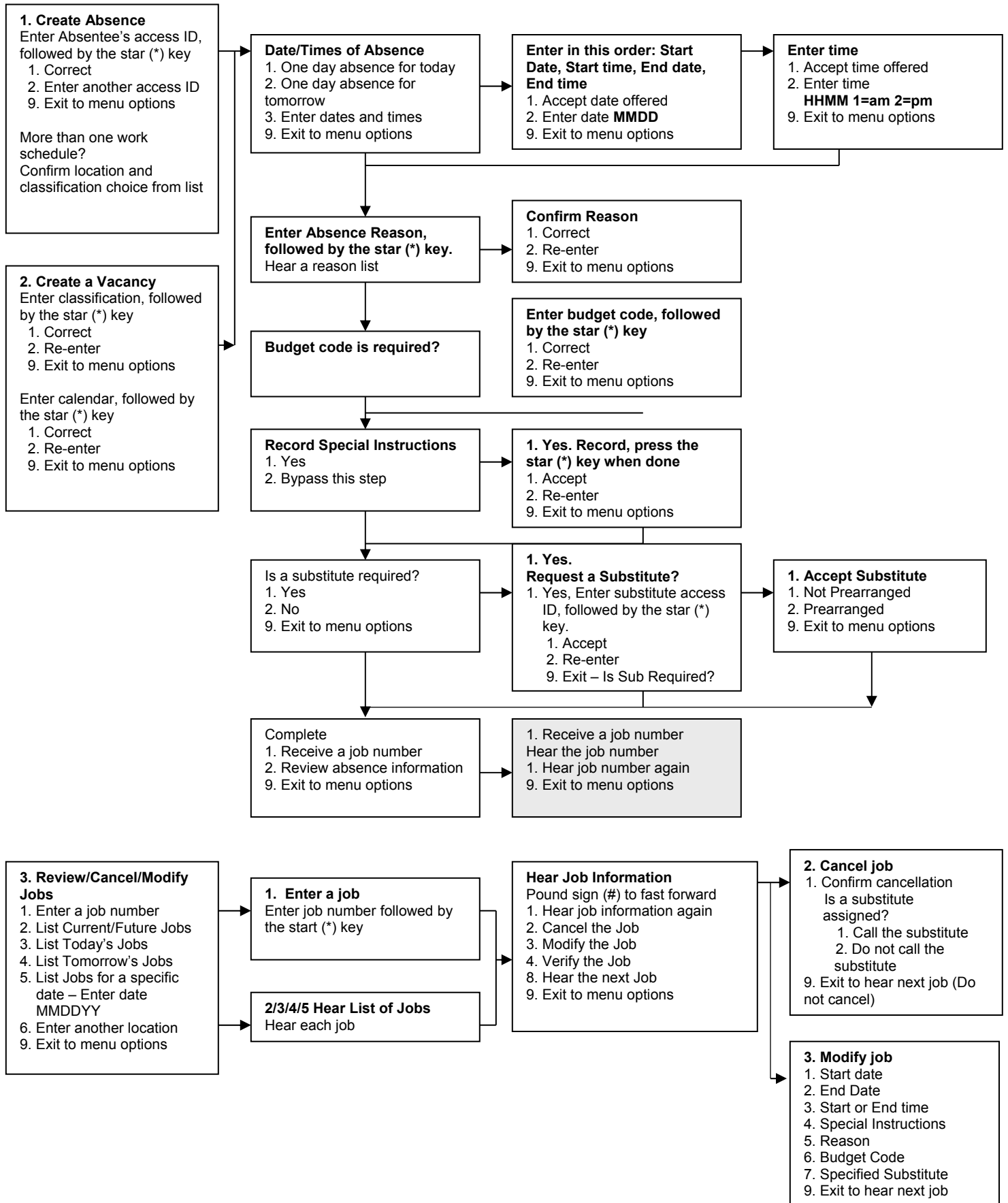
Number	Description	Number	Description
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Please refer to SmartFindExpress documentation on the web site.

Administrator Menu

Enter Access ID, followed by the star (*) key.
Enter PIN, followed by the star (*) key. Listen to announcements.
You will be asked to record your name the first time to sign in.





Browser Access Instructions:

Board Web Link: <https://st-clair.eschoolsolutions.com>

Sign In

- Open board web link to the SmartFindExpress Sign In page.
- Review the messages above the Sign In. Enter your **Access ID** and **PIN**.
- Review additional announcements on your home page, if any.
- Press **Submit** button or **Enter** key.

Important Note: Items in **bold** type are **required** to initiate chosen action.

Announcements

- Create a new announcement
 - Select *New* button
 - Select the location for the announcement (default is your location)
 - Type in the text of the announcement
 - Select the *Save* button

Create an Absence

- **Enter employee's access ID or use the *Name Lookup* button.** If *Name Lookup* is selected
 - 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)
- 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**
- Please do not alter/change/delete Budget Code default unless otherwise notified.
- **Is a substitute required** for this absence?
Choose **Yes** **No**
- **Select Start and End Dates** for your absence
 - Enter the dates with forward slashes (MM/DD/YYYY). Use the calendar icon.
- **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 with special attention to **AM** or **PM**
- **Select Start and End Times** for substitute if different than for absence
 - To change defaults, enter the time in HH:MM am or pm format
 - Ensure that the **correct** time is entered with special attention to **AM** or **PM**
- 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
- Request a particular substitute
 - Enter the substitute's access ID number or use the *Name Lookup* button to find the substitute by name

SmartFindExpress
ADMINISTRATOR WEB CENTRE INSTRUCTIONS

- 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 an Absence

Quick Absence Entry for one (1) day Absence for today using default times

Items in Bold are required to complete an Absence and receive a Job Number.

- **Enter employee's access ID or use *Name lookup***
- **Select Reason for Absence**
- Specify a Substitute
- Prearrange Substitute
- Enter instructions for Substitute and Administrator
- **Select the Continue button**
- Confirm the Absence information
- **Select the Create Absence button to receive a Job Number. Please record this Job Number.**

Create a Vacancy

- **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

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.

Job Inquiry/Reports

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 & Filled, Open, Filled, Finished & Verified, Finished, Verified, Cancelled
- Sub Status - All, No Sub Required, Filled, Not Filled.
- Date Range - Defaults to Today. Enter dates or use the calendar icons to select dates

SmartFindExpress
ADMINISTRATOR WEB CENTRE INSTRUCTIONS

- 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’s 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
- *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

View, modify, 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, Auto Assignment, Do Not Use)
 - Select Classification from drop-down menu or enter the classification code
 - 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, Auto Assignment, 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 *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

View and/or print a list of Employees and/or Substitutes for your location.

Profile Inquiry Tab

- Enter name, access ID, external ID or call back number (substitute only)
- Select the *Search* button
- Select a profile by clicking the *Select* link by the name
- View basic profile information on the profile tab
- Select employee or substitute tab and links within the tabs for detailed information

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 a profile by selecting the *Name* link
- View basic information on the profile tab
- Select the substitute tab and links within the tab for detailed information

Substitute Report from the Substitute Inquiry Tab

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