



Web Navigator User Manual

Absence Approval

Summary



There are two types of administrator permissions: Web Navigator (Org User) permissions and Principal (Campus User) permissions. Web Navigator permissions allow you to give someone access to the Web Navigator while limiting what that person can do and see, as well as limiting which schools and employee types that person has access to. Principal permissions allow you to modify what Campus Users can and cannot do through their Web site as well as what schools and employee types they have access to.

Setting Up Absence Approval

1. Absence Approval Settings
2. Absence Reason
3. Campus User Setup

Step 1: Absence Approval Settings

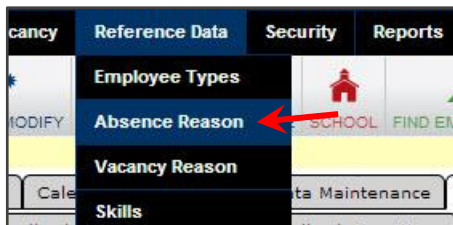
Location: **Master Data > Organization Information > Absence Approval Settings**

Web Navigator	Master Data	Absence/Vacancy	Reference Data	Security	Reports	Extract / I
 CREATE ABSENCE Aesop Edge Cl Add a new prof Prof Ackbar 1/13/2009 9:44 AM) All Schools 2/17/2009 3:45 PM) Jaspers 3/17/2011 12:02 PM) New 201132 112125 NewSchool, TestSchool101, TestSc 3/2/2011 11:21 AM) Uber 1/9/2012 11:14 AM) Walker Middle School 7/14/2010 1:19 PM)	Organization Information (Alt+O)		Organization Information			
	School (Alt+I)		Contact Information			DYEE FI
	Employee (Alt+W)		School Dates			
	Vacancy Profile		Call Times			
	Substitute (Alt+S)		Substitute Absence/Vacancy Settings			
			Shift Types			
			District Work Schedule			
			Permanent Substitutes			te
			Absence/Vacancy Feedback			te
			Absence/Vacancy Feedback Questions			te
			Miscellaneous			
			School Closings			
			No Calling Days			
			Web Alerts (Alt+L)			
			Absence Approval Settings 			
			Daily Limits			
			Substitute Call Time Disclaimer			

The screenshot shows the 'Absence Approval Settings' form. It has a tabbed interface with tabs for General Information, Configuration Settings, Calendar, Web Alerts, Data Maintenance, and Optional Features. The 'Configuration Settings' tab is active, showing sub-tabs for Permanent Substitutes, Absence/Vacancy Feedback, Absence/Vacancy Feedback Questions, Absence Approval Settings (selected), Daily Limits, and Substitute Call Time Disclaimer. The form contains several sections: 'Use Absence Approval' with a checkbox (callout 1), 'Email Employee on Approval Status Change' with three checkboxes (callout 2), and two sections for 'Unfilled absence' and 'Filled Absence' with input fields for days and hours (callouts 3 and 4 respectively). At the bottom are 'Edit', 'Apply Changes', and 'Cancel' buttons.

- 1 **Use Absence Approval:** this is the master switch and must be clicked to use the feature
- 2 **Emails:** these checkboxes control what type of approval status change emails the Employee will get
- 3 **Unfilled absence:** Aesop will not allow the approver to deny the absence if it is within the number of days/hours set here
- 4 **Filled Absence:** if a sub has already been assigned, Aesop will not allow the approver to deny the absence if it is within the number of days/hours set here

Step 2: Absence Reason



Location: **Reference Data > Absence Reason**

Once you have clicked **Use Absence Approval** from Step 1 and clicked **Apply Changes** to save, additional options will appear on the Absence Reason screen.

The new options will be "Needs Approval" and "Hold Until Approved" (if you do not see these options right away try logging out and then back into Aesop).

Absence Reason Types							
Add Absence Reason Type Add Absence Reason Type Bucket							
NOTE: If you already have Absence Reason Balances entered into Aesop – be very cautious making changes to these Absence Reasons or restructuring the "bucket" feature. We suggest contacting Aesop Client Services first!							
Name	Public to Employee	Phone Menu #	Needs Approval	Hold Until Approved	Enforce Balances	Enforce Notes to Administrator	School
Bereavement					✗		
Immediate Family	✓		✗	✗	✗	✗	Victoria County Community Schools

	School	Victoria Cour
	Employee Type	undefined
	All	
	Needs Approval	<input checked="" type="checkbox"/>
	Hold Until Approved	<input checked="" type="checkbox"/>
	Enforce Balances	<input type="checkbox"/>
	Enforce Notes To Administrator	<input type="checkbox"/>

To select absence reasons that require approval:

- Click the Pencil to edit the absence reason that needs approval
- Click the box for Needs Approval
- Click the box for Hold Until Approved if you want Aesop to hold the absence from being filled until after it is approved
- Click **Apply Changes** to save

Repeat this process for all absence reasons that require approval.

Step 3: Campus User Setup

In order for your users to receive approval emails from Aesop they will have to be set up as Campus Users. For more info on how to create a Campus User see Chapter 11: Administrator Permissions. In this chapter we will look at what permissions you will have to check for the user to approve. We will also look at the creation of the Approver Profile.

Principal Permissions Profile

There are certain permissions that will need to be marked in the Campus User's permission profile in order for the Campus User to approve absences. To get to the permission profiles go to **Security > Principal Web > Principal Profiles**.



Principal Permission Profile List			
Add a new profile			
Profile Name	Profile Description	Profile	Associate
Mickey Smith (6/20/2012 10:56 AM)	Mickey Smith	View Edit	View Associate
Principal Permissions (4/4/2013 11:25 AM)	Principal Permissions	View Edit	View Associate

Click [Edit](#) for the profile you would like to edit.

Principal Permission Profile			
Return to Profile List Associate			
Profile Name:	*Principal Permissions		
Profile Description:	Principal Permissions		
Category	Permission	Allowed	
		<input type="checkbox"/> All	<input type="checkbox"/> None
Absence Feedback	All Allowed	Details	
	Add Substitute Experience Feedback	<input checked="" type="checkbox"/>	

Click the [Details](#) button to expand the category and see the permissions.

The two categories that are important to approvals are **Absence – Approved** and **Approve Absence**.

 Absence - Approved	<input type="button" value="All"/> <input type="button" value="None"/> All Allowed	<input type="button" value="Details"/>
	Absence Req. - Delete	<input checked="" type="checkbox"/>
	Absence Req. - Edit	<input checked="" type="checkbox"/>
Absence - Extracted	<input type="button" value="All"/> <input type="button" value="None"/> All Allowed	<input type="button" value="Details"/>
Absence Processing	<input type="button" value="All"/> <input type="button" value="None"/> All Allowed	<input type="button" value="Details"/>
Administrative	<input type="button" value="All"/> <input type="button" value="None"/> All Allowed	<input type="button" value="Details"/>
 Approve Absence	<input type="button" value="All"/> <input type="button" value="None"/> All Allowed	<input type="button" value="Details"/>
	Approve/Deny Absence Request	<input checked="" type="checkbox"/>
	Deny future days after Absence request has been filled	<input checked="" type="checkbox"/>
	Deny regardless of denial cutoff settings	<input checked="" type="checkbox"/>
	Deny Specific days	<input checked="" type="checkbox"/>

Absence – Approved:

Controls absences that have already been approved and allows or denies the ability to Edit and/or Delete

Approve Absences:

“Approve/Deny Absence Request” - This permission is necessary to allow the Campus User to Approve.

“Deny future days after absence request has been filled” This permission controls if the approver can deny an absence AFTER a substitute has filled the absence.

“Deny regardless of denial cutoff settings” This permission controls the ability to allow an approver to override other denial settings at the Organization level.

“Deny Specific days” This permission allows the approver to deny a specific day within a multiple day absence.

Principal Permissions Profile

The Approver Profile tells Aesop what employee types, schools, and absence reasons the approver will approve for. You won't have to create a separate approval profile for each approver but you will have to create a separate profile for each approval process.

ence Data	Security	Reports	Extract / Import
	Web Navigator		
	Principal Web		
	Approver Profiles		
ission	Allowed		

To create an approver profile go to **Security > Approver Profiles**

Approver Profile List			
Add a new profile 			
Profile Name	Profile Description	Profile	Associate
Approvals for Nurse Manager (5/20/2010 11:30 AM)	Approvals for Nurse Manager	View Edit Delete	View Associate
Principal Approval Setup (7/21/2010 1:33 PM)	Principal Approval Setup	View Edit	View Associate

Click the [Add a new profile](#) link.

[Return to Profile List](#)

Profile Name: Approvals for Teachers 1

Profile Description: Approvals for Teachers & Aides

School	Employee Type	Absence Reason	Level	Allow	Disallow
-- Any -- 2	Teacher 3	-- Any -- 4	1 5	<input checked="" type="radio"/>	<input type="radio"/>

- 1 **Name the Profile:** Include anything in the Description to help you keep track of what the profile does.
- 2 **School:** If the Profile is going to be used by different Campus Users – you can leave this as “-- Any --”
- 3 **Employee Type:** If a specific “Employee Type” is needed for Approvals – identify it here.
- 4 **Absence Reason:** Choose the Absence Reason that needs approval
- 5 **Level:** Level is used for multiple level approvals.

For any additional schools, employee types, and absence reasons you can add lines to the Approver Profile by clicking the **+**

[Return to Profile List](#)

Profile Name: Approvals for Teachers

Profile Description: Approvals for Teachers & Aides

School	Employee Type	Absence Reason	Level	Allow	Disallow	
-- Any --	Teacher	-- Any --	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
-- Any --	Aide	-- Any --	1	<input type="checkbox"/>	<input type="checkbox"/>	

Changes will not be saved until the Apply Changes button is clicked. Unsaved changes are color coded.

☐ New Row ☐ Changed Row ☐ Deleted Row

When you are done editing the profile click **Apply Changes** to save.

The above profile would allow the approver to approve for any school and any absence reason only for the Teacher and Paraprofessional employee types.

The Approver Profiles can be as simple or complex as you want them. Below is a more complex set up allowing the approver to be the Level 1 approver in some cases and the Level 2 approver for others.

Assigning Approval Profiles

Once you have set up the Approver Profile you can assign it to the Campus User or Org User. The same profile can be assigned to multiple Users. Aesop will always respect the School Visibility and Employee Type Visibility when determining approvers. For example, if the approver profile says the Campus/Org User can approve for "Any" School Aesop will still only let them approve for the school/schools in their School Visibility profile. For this guide, we'll assign an approval profile to a Campus User.

To do this, go to **Security > Approver Profiles**

Security	Reports	Extract / Import
Web Navigator		
Principal Web		
Approver Profiles		

mission **Allowed**

Click the [Associate](#) link for the Approver profile you want to assign:

Approver Profile List			
Add a new profile			
Profile Name	Profile Description	Profile	Associate
Approvals for Nurse Manager (5/20/2010 11:30 AM)	Approvals for Nurse Manager	View Edit Delete	View Associate
Principal Approval Setup (7/21/2010 1:33 PM)	Principal Approval Setup	View Edit	View Associate

On this next page choose the Campus Users you want to assign the Approver Profile to by checking the box in front of their name:

<input checked="" type="checkbox"/>	Campus User	Markov, Tara	Principal Approval Setup
<input type="checkbox"/>	Campus User	Queen, Oliver	Org Default Behavior
<input checked="" type="checkbox"/>	Campus User	Smith, Mickey	Principal Approval Setup
Edit Apply Changes Cancel			

Click **Apply Changes** when finished.

Another way to assign an Approver Profile to a Campus User is by going to the individual's Campus User profile page. To do this go to **Security > Principal Web > Campus Users**

Data	Security	Reports	Extract / Import	Help
VERI	Web Navigator			?
	Principal Web		Principal Profiles	HELP
	Approver Profiles		Campus Users	
	Profile My profile		School Visibility	
ate	Name Eric Owens District)		Employee Type Visibility	
	User 11821			

Click the name of the Campus User to open up their profile page:

Name	Phone	Email	School Visibility Profile	Login History
Markov, Tara	() -	Terra@titan.com	All Schools	View
Queen, Oliver	() -	oliver.queen@arrow.com	Ackbar	View
Smith, Mickey	() -	mickey@tardis.com	Walker Middle School	View

Click the **Edit** button, and choose the correct Approver Profile in the drop down box:

User: Smith, Mickey
General Information
 Last Update: 4/22/2013 3:03:29 PM

First Name	Middle Name	Last Name	Active
* Mickey		* Smith	<input checked="" type="checkbox"/>
Web Login ID			
* GL2001			
Send Email		Distribution Lists	
<input checked="" type="checkbox"/> for Approvals <input checked="" type="checkbox"/> for Feedback <input checked="" type="checkbox"/> for Event Notification		undefined Campus Users remove	
Phone		Email	
		mickey@tardis.com	
Permission Profile		School Visibility Profile	
Mickey Smith		Walker Middle School	
Employee Type Visibility Profile		Approver Profile	
All Staff		Principal Approval Setup New Approvals for Nurse Manag Principal Approval Setup ← None selected	
Pin		Pin Expires	
* 1313			

Remove Edit Apply Changes Cancel

Fields marked with an asterisk * are required.

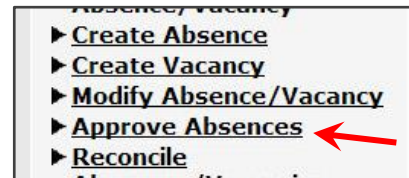
Click **Apply Changes** to save when finished.

The Approval Process

Modify Absence		Create a New Absence	Create another absence for this employee
CONF#:	106658937		
Employee:	Tim Fox	Attachments: High School Rules	
School:	Vanderbilt High School		
Created On:	4/8/2013 10:40:19 AM		
Last Update:	4/15/2013 8:06:38 AM		
Status:	Filled		
Reconciled:	Partially <input type="button" value="Reconcile"/> <input type="button" value="Unreconcile"/>		
Substitute Required:	Yes		
Fulfilled By:	Tom Baker ★★★★★		
Feedback:	Leave Substitute Performance Feedback Leave Substitute Experience Feedback		
Employee Hours Per Day:	8		
<input type="button" value="Edit/Delete"/> <input type="button" value="Split"/>			
Approval Status:	Unapproved		
Approvals Received:	0		
Last Approval Action:			
Approvers:	View List		
Approval Comments:	Show/Hide Comments	<input type="button" value="Upload New"/> <input type="button" value="Edit"/>	

1. 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

When the Campus User logs into their website they would click the “Approve Absences” link to approve the absences they are responsible for.



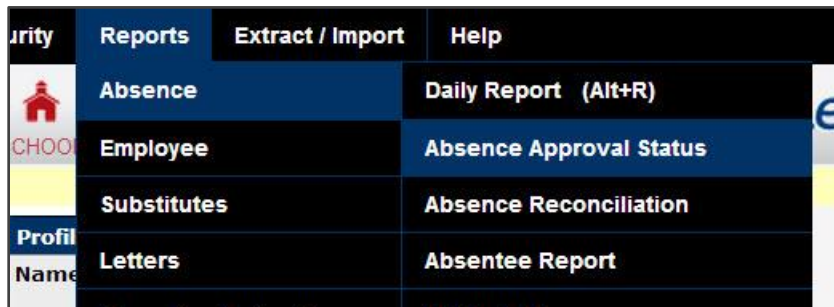
On the approval page the user can enter a date range to see all absences that need to be approved in that range. Check the box on the left and click “Approve” or “Deny.” When an absence is denied the absence is deleted but is still visible for review. Multiple absences can be approved or denied at the same time.

Approve/Deny Absences									
Start Date:	<input type="text" value="04/29/2013"/>	End Date:	<input type="text" value="05/29/2013"/>						
<input checked="" type="checkbox"/> Unapproved	<input checked="" type="checkbox"/> Partially Approved	<input type="checkbox"/> Approved	<input type="checkbox"/> Denied	<input type="button" value="Submit"/>					
CONF#	Employee	Start	End	Length	Absence Reason	Filled Status	Approvals Received	Notes	
<input type="checkbox"/> 108602160	Fox, Tim	04/30/2013	04/30/2013	1 Day	Personal Day	No	Unapproved	0	
									<input type="button" value="Approve"/> <input type="button" value="Deny"/>

The Approval Status Report

The Web Navigator can check the status of Approvals. They can also approve the absences if they have the permission.

To view the Absence Approval Status Report go to **Reports > Absence > Absence Approval Status**



The Web Navigator is able to view the status on all approvals in this report

Absence Approval Status [Return to Report Menu](#)

Start Date: End Date: School: Employee: Absence

Reasons: Statuses: ☒ Unapproved ☒ Approved ☒ Denied ☒ Partially Approved

CONF#	Employee	Absence Start	Absence End	# Of Absence Days	Absence Reasons	Substitute	Status	Last Approver	Last Approval Action
108602160	Fox, Tim	04/30/2013	04/30/2013	1	Personal Day	--	Unapproved		

The Approval Log

An individual absence needing approval will also contain the "Log" of the process. This log can be viewed by the Web Navigator as well as by the Campus User if they have the correct permissions.

While on the absence modify screen click the gray tab “Approval Log” to view the approval log for this absence.

List Absences/Vacancies	Modify	Absence/Vacancy Log	Approval Log	Call History	Available Substitutes	Approvers	Attachments	Allocation Gr
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Feedback

Enter a Confirmation #:

Log Entries for Confirmation # 108602160

Description	Who	Where	Date	Status
Approval Emails sent to 2 recipients (Terra@titan.com, mickey@tardis.com)		Automated Process	4/29/2013 8:17:31 AM	Approval Email Sent
Approved Absence Request (1) - FINAL	Smith, Mickey	Campus User Web	4/29/2013 8:28:35 AM	Approved

The approval log shows information like:

1. Who the approval email notifications were sent to
2. Who approved the absence
3. Who denied the absence (if applicable)
4. Time and date that the absence was approved or denied

The Employee Side of Approvals

When an employee creates an absence that requires approval they can see the status of approval right on their homepage under the “Schedule Absences” tab.

Create Absence	2 Scheduled Absences	6 Past Absences	0 Denied Absences
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Date	Reason	Location	Duration	Time	
CONFIRMATION # 108602160 UNFILLED / APPROVED					
30 Apr 2013	Personal Day	Williams High School	Full Day	8:00 AM - 3:00 PM	View Details
CONFIRMATION # 108606220 UNFILLED / UNAPPROVED					
01 May 2013	Personal Day	Vanderbilt High School	Full Day	8:00 AM - 3:00 PM	View Details

The employee can also be set to receive an email when the absence is approved, partially approved, or denied. In the email on the right the employee is being notified that the absence has been partially approved by the Level 1 Approver.

Once the absence is approved or denied by the final approver the status will be updated to the employee in their webpage and email.

Approval Process Chart

You may find this chart helpful when starting to plan out your Approval needs.

Approver	Absence Reason they approve	Employee Types they approve	Schools that employees are in	Level of Approval