Aesop®
Substitute Placement & Absence Management

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
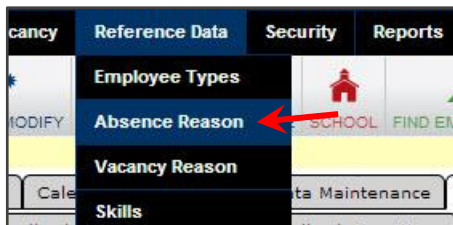
Step 1: Absence Approval Settings

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

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).

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**.

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Click Edit for the profile you would like to edit.

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:

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.

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

Click the Add a new profile link.

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 ✚

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**

Click the Associate link for the Approver profile you want to assign:

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:

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**

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

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	☑

Web Login ID
*GL2001

Send Email
☑ for Approvals
☑ for Feedback
☑ for Event Notification

Distribution Lists
undefined
Campus Users   remove

Phone

Email
mickey@tardis.com   ✉

Permission Profile
Mickey Smith

School Visibility Profile
Walker Middle School

Language
none selected

Employee Type Visibility Profile
All Staff

Approver Profile
Principal Approval Setup   *New*
Approvals for Nurse Manag
Principal Approval Setup
None selected

Pin
*1313

P

Pin Expires

Remove   Edit   Apply Changes   Cancel
Fields marked with an asterisk * are required.

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

The Approval Process

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.
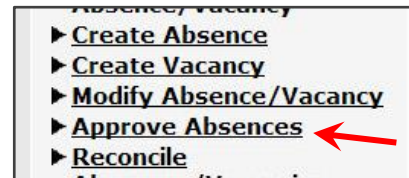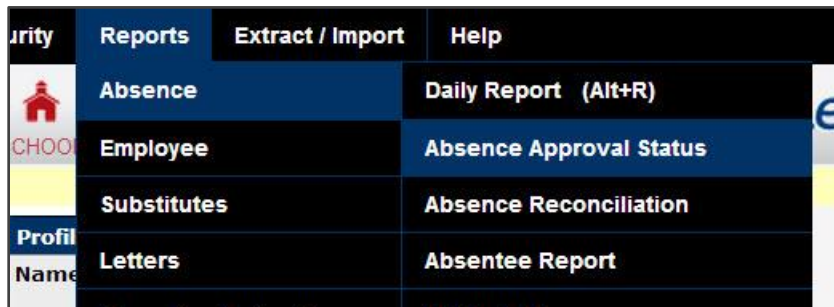

On the approval page the user can enter a date range to see all absences that need to be approved in that range. Check the box on the left and click "Approve" or "Deny." When an absence is denied the absence is deleted but is still visible for review. Multiple absences can be approved or denied at the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

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

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.

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.

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