



Automated Substitute Placement & Absence Management
Selected by more districts than all other systems combined

Rolling Over Absence Reason Balances



397 Eagleview Boulevard
Exton, Pennsylvania 19341

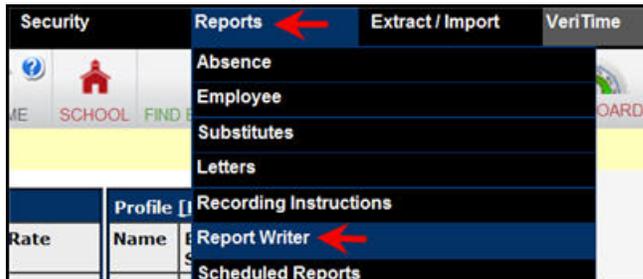
Intro

One thing many Aesop Administrators are asked to do during the summer break is to update the absence reason balances for all employees before the new school year starts. This doesn't have to be a tedious and time consuming task. This document will walk you through the best way to make these changes easily and efficiently.

Getting Current Balances

When rolling over absence reason balances many districts add days or hours to the current balance that the employee has. To do this you will first need to run a report to get the current balances. The best way to do this is with Report Writer. The good news is there is already a pre-created report in Report Writer for you to run to get this information.

To get to Report Writer click (in the Black Menu Bar)
Reports > Report Writer



There are a number of different report types here beginning with Absence Data. The report type you are looking for is **Absence Balances** and specifically the report **Absence Balance Rollover Report**. Scroll down on the page until you find it.

Absence Reason Balance (Create New)					
Name	Access	Created	Created By	Last Run	# Runs
Absence Balance Rollover Report		7/22/2010 11:04 AM	System	6/14/2011 11:06 AM	2
					Use as template Run with new filters Run with Saved Filters

This report has already been set up to pull the info you need so click the link **Run with Saved Filters**



On this next page you will choose what type of output you would like the report to be in. For what we are doing today we will need the report to be in Excel so check the box for **Excel Compatible**. You can uncheck the box for HTML. Leave the rest of the settings the way they are and then click the **Run** button.

A screenshot of the "Absence Balance Rollover Report" configuration page. The page title is "Absence Balance Rollover Report" with a template ID of 75367. Under the "Output Types" section, the "Excel Compatible (csv)" checkbox is checked and highlighted with a red box and a red arrow. Other options include HTML, Delimited Text (with a "Delimiter" dropdown set to "Tab"), and Fixed Length Text. Under the "Delivery Options" section, "Run for myself" is selected. The email address is "goinsa@schools.edu.org". There are checkboxes for "Attach results to email" and "Deliver to FTP Server", both of which are unchecked. At the bottom, there are "Run" and "Cancel" buttons, with a red arrow pointing to the "Run" button.

You will be taken to a page called **Report Executions** where you will see the message “**your report has been submitted for processing.**” This page will show you all the times you have run this report listed at the bottom of the page with your latest run at the bottom of the list. You will notice that the **Finished** column will be blank for the report you just ran. You should be able to refresh this page a few times and see that the report is finished. If you have thousands of employees in your district you may want to grab a cup of coffee and come back to refresh the page. Once you see a date and time in the **Finished** column you know the report is ready to be viewed. To view the report click the **Excel icon** in the **Output** column.

Entered	Started	Finished	User	Output
6/14/2011 10:51 AM	6/14/2011 10:52 AM	6/14/2011 10:52 AM	Nav. Super User	
6/14/2011 11:06 AM	6/14/2011 11:06 AM	6/14/2011 11:06 AM	Nav. Super User	
6/15/2011 11:54 AM	6/15/2011 11:54 AM	6/15/2011 11:54 AM	Nav. Super User	
6/15/2011 12:15 PM	6/15/2011 12:15 PM	6/15/2011 12:15 PM	Nav. Super User	

When you click the icon you will get a popup asking if you want to Open or Save the file. Click Save. This is a file you will want to keep even after you have completed the rollover process to have a record of the absence reason balances at this time. Save it somewhere on your computer that is easy to find, like your desktop. Once you have saved it go ahead and open the file and have a look.

Your excel spreadsheet should look something like this.

	A	B	C	D	E	F	G	H	I
1	Employee Full Name	Employee Iden	Absence Reas	Absence Re: External ID	As of date	Initial Bal	Days used	Days rem	Days remaining (after f
2	Bauer, Jack	927206648	Illness	ILL	7/1/2010	5	0	5	5
3	Blanche, Barry	927206612	Illness	ILL	7/1/2010	5	0	5	5
4	Campbell, Jason	927206623	Illness	ILL	7/1/2010	6	0	6	6
5	Cox, Tim	927206617	Illness	ILL	7/1/2010	5	1	4	4
6	Donaldson, Colby	927206606	Illness	ILL	7/1/2010	5	0	5	5
7	Dundon, Craig	927206636	Illness	ILL	7/1/2010	5	0	5	5
8	Foster, Jeff	927206599	Illness	ILL	7/1/2010	20	0	20	20

The report will have the following columns:

- Employee Full Name**
- Employee Identifier**
- Absence Reason**
- Absence Reason External ID**
- As of Date**
- Initial Balance**
- Days Used Since as of Date**
- Days Remaining (as of run date)**
- Days Remaining (after future absences)**

The Days Remaining columns are where you will find your employee’s current balances. **These are the totals you will want to add new balances to for the upcoming school year.**

Days Remaining (as of run date) will show the employee’s current remaining balance only taking into account absences that have happened up until the time the report was run.

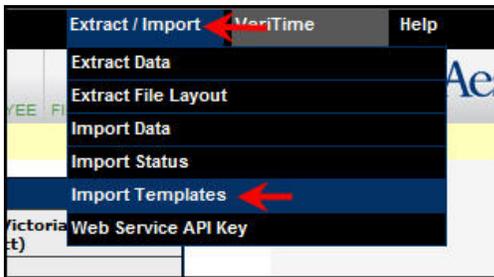
Days Remaining (after future absences) will show the employee’s remaining balance after subtracting the time for any scheduled future absences.

Note about Days vs Hours: Even though the column header says **Days**, the number you see in the column will reflect the number of days **or hours** that the employee has remaining.

Uploading New Balances

To upload new absence reason balances to Aesop you will use the Data Import feature. First you will need to populate the Data Import Template with the new balances. To get to the data import template go to

Extract/Import > Import Templates



The template you want is the **Employee Load**. Click the link that says **Template**.



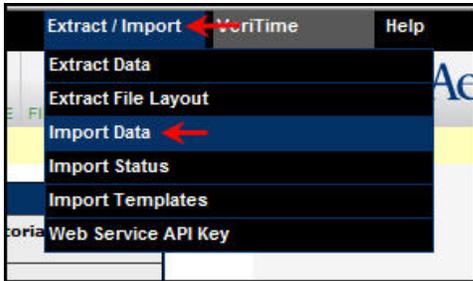
You will get a pop up box asking you if you want to open or save the file. Go ahead and save it somewhere on your computer that will be easy to find later. Once you have saved it open the file. The employee import template has around 55 columns but for this you will only need 4 of them. The very first column (**Identifier**) will need to be populated to identify the employees you want to update. The other columns you need to fill in can be found by scrolling over to the columns that are colored green, specifically **Absence Reason External ID**, **Balance**, and **As Of Date**.

	AU	AV	AW	
File	Absence Reason External ID	Balance	As Of Date	Re

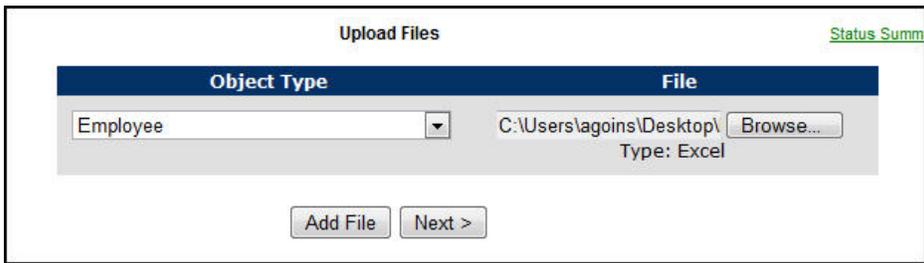
This is where you can use the **Report Writer report you created earlier** to help fill in this template. Data like the identifiers and absence reason external IDs can be copied from that file directly into the columns on this file. Once you have filled in the new **balances** and **as of dates** you are ready to save the file and upload it.

VERY IMPORTANT: When importing absence reason balances into Aesop you are not adding to the employee's current balance but **replacing their current balance** with a new balance. The balance and as of date that you put in the import file will replace their current balance and as of date.

To import the template you just saved go to **Extract/Import > Import Data**

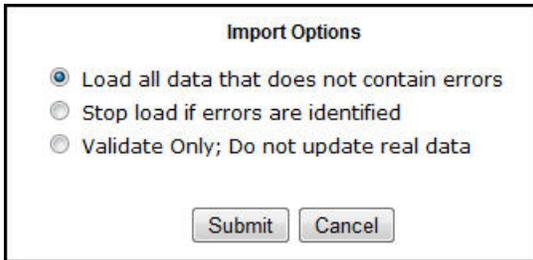


On the next page leave the Object Type as **Employee** and then browse to find the file you saved. Then click **Next**.



On the Preview Import page you can **SCROLL ALL THE WAY TO THE BOTTOM OF THE PAGE** and click **Submit Import**.

On the next page, Import Options, choose your option and click **submit**. In most cases you will want to stay with the option **Load all data that does not contain errors**.



Now your file has been submitted for import and your new Employee Absence Reason Balances will be uploaded in no time. Refresh this page to update the status of your import.

Import Status New Import								
<input checked="" type="checkbox"/> View imports from all users								
#	Submitted	User	Status	# Files	Rows	Error		
<input type="checkbox"/> 53224	6/17/2011 2:47 PM	Nav. Super User	Submitted	1	19	0	Cancel	Details
<input type="checkbox"/> 52168	6/14/2011 11:37 AM	Nav. Super User	Completed	1	1	0		Details

For more information on importing data into Aesop check out the **Data Import** document found in your Training and Reference Materials.

If you need further help with your absence reason balances feel free to contact Aesop Client Services with any questions.