



Web Navigator User Manual

Employee Settings

Employee Settings Overview

The Employee Settings enable you to add new employees, modify existing ones, edit an employee's personal information and permissions, modify the Employee's preferred substitute list, manage Employee Types, and more.

Employee Types

Master Data		Absence/Vacancy		Reference Data		Security		Reports	
CREATE VACANCY	ABSENCE MODIFY	ABSENCE MODIFY	ABSENCE MODIFY	EMPLOYEE TYPES	EMPLOYEE TYPES	SCHOOL	FIND EMPLOYEES		
Classes		Local User Groups		Absence Reason					
/Vacancy Chart				Vacancy Reason				Profile [My]	
vacancies/Vacancies	# Need Fulfillment			Skills				Name	Eric Sch
	1			Budget Codes				User ID	118
	2			Pay Codes				Email	goi
	3			Accounting Codes				Level	Sup
	1			Allocation Groups					
on Alerts				Distribution Lists					
		Message		Ethnicity					
		Please set		end dates, and					
		school. Click		here to define dates for your sc					

If you are adding an employee, you will first need to choose the employee type. An employee type is a broad classification for employees. Employee Types are important because they allow you to designate certain groups of employees. This is helpful when setting up the district calendar and absence approval among other things.

You can find Employee Types by going to the main menu bar and selecting **Reference Data** > **Employee Types**.

Creating a New Employee Type

Click the  icon to add a new record.

	1	2	3	4	5	6	7	8
	Description	Shift Types	External ID	Internal Data Analysis Category	Enforce Absence Reasons	Deduct Break Time	Balance Tracking Type	Rounding Rule
		Use Default			<input type="checkbox"/>	Default	Track Balances By Day	No Rounding
	Aide	Hourly	Aide		<input type="checkbox"/>	Default	Track Balances By Day	No Rounding
	Janitor	Use Default		Facilities Staff	<input type="checkbox"/>	Default	Track Balances By Day	No Rounding
	Nurse	Use Default		Nursing Staff	<input type="checkbox"/>	Default	Track Balances By Day	No Rounding

- 1 Enter a Description of the employee’s job.
- 2 Select a Shift Type for the employee: either Full/Half Day, Full Day Only, Hourly, or Both.
- 3 Give the Employee Type a unique External ID.
- 4 Select an “Aesop Internal Data Analysis Category.” This option helps Aesop to standardize job categories for all users.
- 5 Check the box if you wish to enforce absence reason balances for this employee.
- 6 Choose whether to deduct a break time from the Employee.
- 7 Choose whether you would like the Employee Type balance to be tracked by day or hour.
- 8 Choose whether you want balances to round up or down to the nearest quarter, half, or full hour.

Icon Key

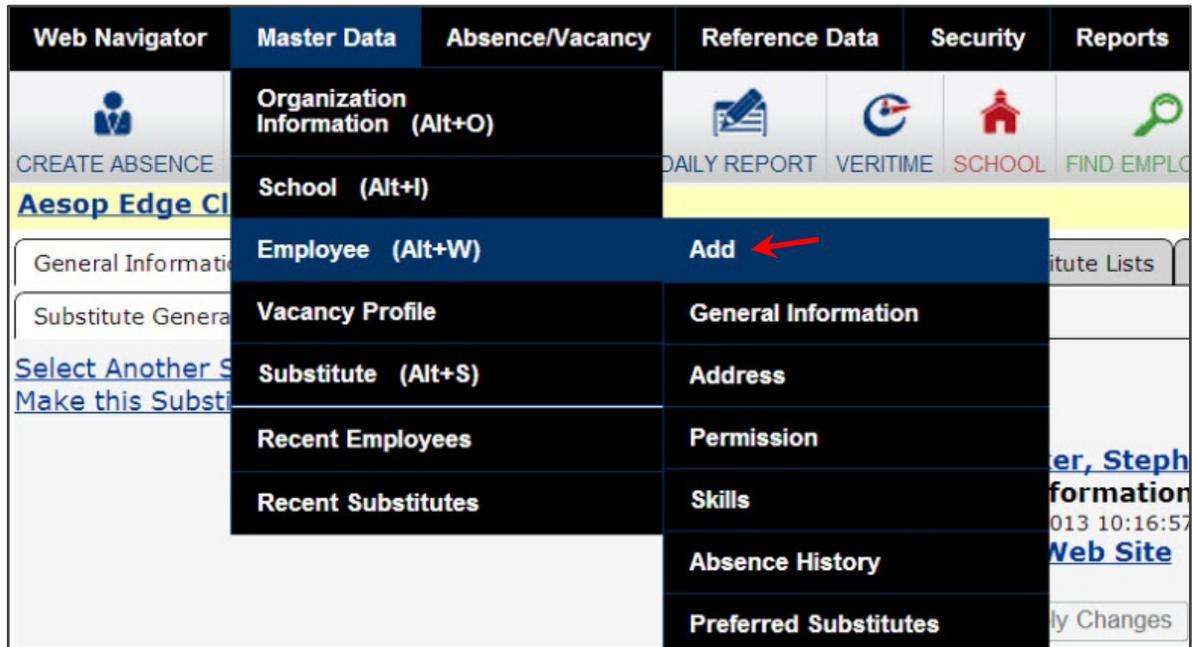
Click the  icon to **save**

Click the  icon to **cancel**

Click the  icon to **modify** a record

Click the  icon to **delete** a record

Adding New Employee



Employees can be added through the Data Import feature [Chapter 15] but they can also be added one at a time. From the main menu bar select **Master Data > Employee > Add**.

Fill in the General Information for the new employee.

General Information

Each employee has his/her own “general information” page. To select an employee, go to **Master Data > Employee**, click the alphabet letter corresponding to the first letter of the employee’s last name, or type the employee’s last name, phone, e-mail, or identifier in the Search box and click Search.

Employee: Hill, Rachel
General Information
 Last Update: 1/16/2013 9:45:37 AM
[Login to Web Site](#)
 Remove Edit Apply Changes Cancel
 Fields marked with an asterisk * are required.

First Name * Rachel	Middle Name 	Last Name * Hill	Active <input checked="" type="checkbox"/>
Identifier * 927206629	Employee Types * Teacher		
Phone (login id) * 5555551295	Alternate Login ID (8,9,11-20 characters)	Title High School Science	

Fields marked with an asterisk * are required when entering a new employee

- 1 **Login to Web Site:** Clicking this link will log you directly into this employee’s web site. Be aware that this will also log you out of your Web Navigator session.
- 2 **Identifier:** The identifier is a unique designation that is given to all employees. It can be alpha-numeric and up to 30 characters.
- 3 **Phone (login id):** The phone number will be the employee’s login id unless an alternate login id is specified.
- 4 **Employee Type:** Choose the general employee type for this employee.
- 5 **Active:** If the box is NOT checked, the employee will be marked as inactive. This keeps the employee data for record-keeping purposes, but stops any interaction with Aesop. The district is not charged for inactive employees.
- 6 **Title:** This is the employee’s specific title. Substitutes will hear this when they are offered jobs over the phone.

General Information (cont.)

Many fields on the General Information page are optional and may not be used by your district. Most fields can be reported on in Report Writer [See Chapter 14 for more information on Report Writer].

Pin * 4553 Change Pin 1	Pin Expired <input type="checkbox"/> 4	Pin Expires <input type="text"/>
School(s) * Vanderbilt High School 2		
Gender <input type="text"/>	Room * Main Office 5	
Start Date <input type="text"/> 3	End Date <input type="text"/>	Birth Date <input type="text"/>

*Fields marked with an asterisk * are required when entering a new employee*

- 1 PIN:** this number will be used in conjunction with the login id for the employee to log into Aesop. The PIN can be set to expire but this is not recommended. Click **Change PIN** to give the Employee a new PIN number.
- 2 School:** the location where a substitute will be told to report. To select multiple schools, hold down the **Ctrl key** and click on the schools from the list (see page 17).
- 3 Employee Times:** All times can be left blank, and Aesop will default to the school's times (full day, Half AM & Half PM).
- 4 Pin Expired:** Check this box to force the Employee's PIN to automatically expire, requiring a PIN change, on a certain date.
- 5 Room:** Enter the room that the Substitute will report to. We recommend entering "Main Office" in this field.

General Information (cont.)

The screenshot shows a form titled "Deduct Break Time from Absence Duration/Balances" with a "Default" dropdown menu. Below this are several rows of input fields: "Language" (English), "Msg. Required" (None), "Budget Code" (empty), "Total Experience" (empty), "School Experience" (empty), "Accounting Code" (-- None Selected --), "E-Mail" (empty), "Name Recorded" (Yes), "Notes" (empty text area), and three "Employee External ID" fields (all empty). At the bottom, there are buttons for "Remove", "Edit", "Apply Changes", and "Cancel". Red circles with numbers 1 through 7 are overlaid on the form to indicate specific callouts.

- 1 **Deduct Break Time:** Choose whether or not to automatically deduct a break time from this Employee.
- 2 **Language:** English, Spanish, or French can be chosen as the default language for the phone system.
- 3 **Email:** It is recommended that the employee's email address is put in so they can receive email notifications.
- 4 **Notes:** Use this field to add extra notes about this Employee.
- 5 **Name Recorded:** This informs you whether the Employee's name has been recorded by the system (or manually recorded).
- 6 **Accounting Code:** An accounting code can be assigned to the employee so the code will be attached to any absence they create [see chapter 16]
- 7 **Remove:** This deletes Employee from the database and removes all historical data.

Address

If you enter addresses, you can use Report Writer to pull the address information out of Aesop and into an Excel spreadsheet for mail merges.

Employee: [Hill, Rachel](#)
Employee Address

Address 1

Address 2

Address 3

Address 4

City **State** **Zip**

Fields marked with an asterisk * are required.

Permissions

The Permissions section governs how an employee is permitted to interact with Aesop.

Employee: [Hill, Rachel](#)

Permissions

Can Assign Substitute to Absence 1

Can Hold Absence Processing 2

Can Upload Files

Email when Absence is Filled

Absence Cancellation 3

Can NOT cancel Absences

Can cancel UNFILLED Absences

Can cancel FILLED or UNFILLED Absences

Substitute Requirements 4

Does not require a Substitute

Always requires a Substitute

Can decide if a Substitute is required

Employee Preferred Substitutes List

Preferred Substitutes List Default: Edit Pref. List(Basic)

Use default setting 5

Can Hold Absence Till 'n' hours prior to Absence Start

Fields marked with an asterisk * are required.

- 1
Can Assign Substitute to Absence: Allows the Employee to directly assign a sub of their choosing when they create an absence.
- 2
Can Hold Absence Processing: Allows the Employee to put an absence on hold after they create it (not recommended).
- 3
Absence Cancellation: Choose if you want the employee to be able to cancel an absence once it is created. Cancel cutoff times can be set at the School's General information page.
- 4
Substitute Requirements: Does this employee require a substitute when they are absent? "Can decide" will allow the employee to choose if a sub is needed when they create the absence.
- 5
Employee Preferred Substitutes List: Choose what abilities you want the employee to have when setting up their preferred substitute list.
 - **Do Not Display Pref. List:** the employee will not be able to view or edit their preference list.
 - **Display Pref. List:** the employee will only see their preference list but will not be able to edit it.

- **Edit Pref. List (Basic):** they will be able to view and edit who is on their preference list.
- **Edit Pref. List (Adv.):** they will be able to edit their preference list including visibility settings (not recommended.)
- **Edit Pref. List (Basic) No Exclude:** same abilities as the Basic setting but without the ability to exclude substitutes.
- **Edit Pref. List (Adv.) No Exclude:** same abilities as the Advanced setting but without the ability to exclude substitutes
- **Use Default Setting:** Set the employee to the default setting on the School's General Info Page

Skills

If you are using skill matching, assign the new employee the appropriate skill requirement(s). See the Skills section [Chapter 9] for more details.

Adding a new skill to an Employee



Begin by clicking the [Add New Skills](#) link under **Configuration > Skills**.

Skills (cont.)

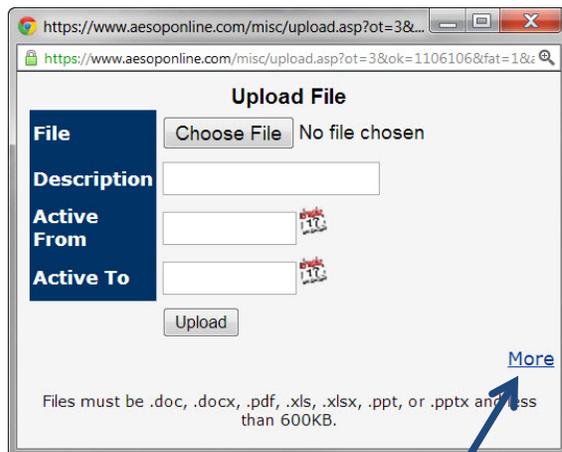
Skill Description	# Substitutes with skill	Fulfillment Skill	Expires	Fulfillment Requirements			Should Have "% Lead Time Enforced" Overrides		Should Have "Short Lead Time Boundary" Overrides		Should Have "Long Lead Time Boundary" Overrides			
				Must Have	Should Have	Must Not Have	Default	%	Default	# Hours	# Mins	Default	# Days	# Hours
Aide	4	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	10%	<input type="text"/>	12h 0m	<input type="text"/>	<input type="text"/>	3d 0h	<input type="text"/>	<input type="text"/>
Calculus	0	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	20%	<input type="text"/>	1h 10m	<input type="text"/>	<input type="text"/>	1d 6h	<input type="text"/>	<input type="text"/>
Certified Teacher	6	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	90%	<input type="text"/>	3h 0m	<input type="text"/>	<input type="text"/>	3d 0h	<input type="text"/>	<input type="text"/>

- 1 Next, check the "Fulfillment Skill" box for the skill you would like to assign to the employee.
- 2 Choose Must Have, Should Have, or Must Not Have for the new skill:
 - **Must Have:** Any substitute who wants to replace the employee absolutely must have the "skill" assigned to his/her record.
 - **Should Have:** The substitute who replaces the employee should have the "skill" on his/her record. This particular skill will expire at a point in time, allowing substitutes without the "Should Have" skill to see this employee's absences.
 - **Must Not Have:** Any substitute who wants to replace this employee must not have the "skill" assigned to his/her record. For instance, if you use skills of "male" and "female" for gender-specific positions, you may assign a "Must Not Have" skill of "Female" to a male employee, so that no substitutes with the "Female" skill will ever see this employee's absences.
- 3 Click **Apply Changes** to save the changes.

Absence / Vacancy Files

Files can be uploaded to an employee where the file/files will be attached to the employee's absences for the time period you designate.

To upload a new file, click the link [Upload New Files](#).



Click **Choose File** to browse your computer for the file you want to upload.

Give the file a description.

Choose a date range for which you would like the file to be active.

Click **Upload**.

Note: Word, PDF, and Excel documents may be uploaded.

Tip: You can upload multiple documents at once by clicking the [More](#) link.

Once the document is uploaded it will be attached to all absences for this employee that fall within the date range chosen. The substitute will be able to view the document once they accept the job.



Absence Reasons

This page allows you to adjust an individual employee's absence reason(s). The initial balance and as of dates can be changed from here. Please refer to the School Settings section [Chapter 5] for specific instructions on how to add new absence reasons or modify existing reasons.

General Information	Permission	Configuration Settings	Absence Reasons	Preferred Substitutes	Allocation Groups	Reports	Optional Features
---------------------	------------	------------------------	-----------------	-----------------------	-------------------	---------	-------------------

Select Another Employee | Create an Absence | Add Employee | Send Letter/Email

Employee: **Hill, Rachel**

Values in the fields below will update all Absence Reasons that are selected in the action column.

As of Date Add Balance to existing balance

Add Absence Reasons

Absence Reasons	Tracking Type	Initial Balance	As Of	Time Used	Current Balance	Time From Pending Absences	Action	Delete	Log
Illness	Daily	* 5	07/01/2011	0	5	0	<input type="checkbox"/>	<input type="checkbox"/>	Log
Personal Day	Daily	* 3	07/01/2011	0	3	1	<input type="checkbox"/>	<input type="checkbox"/>	Log

Fields marked with an asterisk * are required.

Preferred Substitutes

Employee: **Rachel Hill**
Substitute List

Calling Sequence: Job Visibility: [Visibility Calculator](#)

In The Call Order Specified Below
 In Random Order (Call Order is not used)

% Lead Time Visible: 100
 Minimum: 24 Hours 0 Minutes
 Maximum: 120 Days 0 Hours

To select Preferred Substitutes you must click "Add New Substitutes" - and check the box to the left of their name. To give the substitutes "Favorite 5" status, you must use the "Favorite 5" radio buttons to select and rank them. Pending availability and qualification, these substitutes will receive instant notification of your absence by email (if they have an email address in the system) and/or phone. You may select up to 5 favorite substitutes to function in this manner, any additional substitutes added to your list would not receive the email.

*Your District may have applied adjustments to this process.

[Add New Substitutes](#)

Please type the first few letters:

View All
 View Excludes
 View Includes

On List	Substitute	Exclude	Include	% Lead Time Visible	Default	Override	Minimum Visibility	Maximum Visibility	Favorite 5					Comments
							Hours: Minutes	Days: Hours	1	2	3	4	5	
<input type="checkbox"/>	Baker, Tom	<input type="checkbox"/>	<input checked="" type="checkbox"/>	100%			24h 0m	120d 0h	<input type="radio"/>					
<input type="checkbox"/>	Barker, Bob	<input type="checkbox"/>	<input checked="" type="checkbox"/>	100%			24h 0m	120d 0h	<input type="radio"/>					
<input type="checkbox"/>	Dayst, Anthony	<input type="checkbox"/>	<input checked="" type="checkbox"/>	100%			24h 0m	120d 0h	<input type="radio"/>					

This list includes the preferred and excluded substitutes.

Note: See the chapter on preference lists for more details [Chapter 10].

Job Visibility

You can set a default for the list and override individual subs if necessary. This applies only to substitute's access to this school or schools/teachers grouped under this selected school.

To add a new substitute:

1. Click the [Add New Substitutes](#) link
2. Click on the alphabet letter corresponding to the desired substitute’s last name (or enter substitute’s last name into the “Search” box and click **Search**)
3. Click the “On List” box to select the substitute
4. Select either Exclude or Include
5. Enter days override settings if you wish to override the default visibility
6. Click the **Apply Changes** button to save*
7. Repeat Steps 2-6 for additional substitutes

If you do not wish to save the changes click the **Cancel button.*

Absence Approvers

When using the Absence Approval Feature [Chapter 12] you have the ability to assign multiple absence approvers who may approve/deny this employee’s request. This is where you can view a list of who is set up to approve for this employee.

Employee: Hill, Rachel		
Users allowed to Approve for this Employee		
1 level of Approval Required		
Level 1 Approvers		
Name	Receives Email Notifications	
Aaron Goins <input type="checkbox"/>	No	
Dean Winchester <input type="checkbox"/>	No	
Tara Markov <input type="checkbox"/>	Yes	

Absence History

The Absence History shows you all absences, as well as the absence reasons, from the past 366 days and scheduled for the next 366 days. If you have enabled Feedback, you can access any feedback by clicking the [Details](#) link.

Absence History (cont.)

General Information	Permission	Configuration Settings	Absence Reasons	Preferred Substitutes	Allocation Groups	Absence Approvers	Reports	Optional Features
Absence History	Qualified Substitutes	Communications to Employee	Change Log	Login History				

Select Another Employee | Create an Absence | Add Employee | Send Letter/Email

Employee: [Hill, Rachel](#)
Absence history for the next 366 days as well as the past 366 days

CONF#	Substitute	Feedback ABOUT Substitute	Feedback Left by Substitute	Start Date	Absence Reason	Days	School	Status
99217283	Parker, Stephanie	★★★★★ Details		01/18/2013	Personal Day	1.00	Vanderbilt High School	Filled

Tip: If you have enabled Feedback, you can access any feedback by clicking the Details link.

Note: Aesop will break the days down into percentages of days.

Qualified Substitutes

View all qualified substitutes for this employee. Aesop checks for substitutes with qualified skills. Aesop also allows you to see if the substitute is on the employee's Preferred Substitute List.

General Information	Permission	Configuration Settings	Absence Reasons	Preferred Substitutes	Allocation Groups	Absence Approvers	Reports	Optional Features
Absence History	Qualified Substitutes	Communications to Employee	Change Log	Login History				

Select Another Employee | Create an Absence | Add Employee | Send Letter/Email

Employee: [Hill, Rachel](#)
Qualified Substitutes

Specify the time till Absence start to test Should Have Skills.
Now Go

Please type the first few letters or choose a [link](#) from the list below. Search

A-T [W-Y](#)

View Qualified
 View All

Substitute Name	Must Have OK?	Skill Checks Should Have OK?	Must Not Have OK?	On Preference List(s)
Baker, Dee	✓	✓	✓	Yes
Baker, Tom	✓	✓	✓	Yes
Barker, Bob	✓	✓	✓	Yes
Barrowman, George	✓	✓	✓	Yes

Communications to the Employee

This page shows the history of the Letter Writer letters sent to this employee. Letter Writer letters can also be sent to this employee from this page.

General Information	Permission	Configuration Settings	Absence Reasons	Preferred Substitutes	Allocation Groups	Absence Approvers	Reports	Optional Features
Absence History	Qualified Substitutes	Communications to Employee	Change Log	Login History				

Select Another Employee | Create an Absence | Add Employee | Send Letter/Email

Employee: [Hill, Rachel](#)
Communications to Employee

Send a new letter or email
 Choose a letter template: Employee Welcome Letter Template

Print Letter Send Email

Name	Generated	Successful?	Delivery Method	Emailed To
Employee Welcome Letter Template	1/18/2013 1:30:09 PM	Yes	Letter	

Choose the letter template to use. Click the **Send Email** button.

Change Log

Details of changes made to the employee's record are recorded in the Change Log.

General Information	Permission	Configuration Settings	Absence Reasons	Preferred Substitutes	Allocation Groups	Absence Approvers	Reports	Optional Features
Absence History	Qualified Substitutes	Communications to Employee	Change Log	Login History				

Select Another Employee | Create an Absence | Add Employee | Send Letter/Email

Employee: [Hill, Rachel](#)
Change Log

Start Date: 12/18/2012 End Date: Category: All Go

Date	Action	Object	Field	Old Value	New Value	Who	Where	Category
1/8/2013 3:37:48 PM	Changed	Personal Day	Projected Balance	3	2		Automated Process	Absence Reasons
1/9/2013 10:14:00 AM	Added	Stephanie Parker				Nav. Super User	Web Navigator	
1/16/2013 9:45:37 AM	Changed		Title		High School Science	Nav. Super User	Web Navigator	General
1/17/2013 3:00:32 PM	Added	Seating Chart.xlsx				Nav. Super User	Web Navigator	

Login History

Aesop records every time the employee logs into Aesop on the web or over the phone.

Employee: [Hill, Rachel](#)
Login History

Start Date: 12/18/2012 End Date: Go

Logged In	Logged Out	Timed Out?	Where
1/7/2013 10:55:42 AM	1/7/2013 11:55:49 AM	Yes	Teacher Web
1/7/2013 4:24:15 PM	1/7/2013 5:25:00 PM	Yes	Teacher Web
1/8/2013 3:09:19 PM	1/8/2013 4:37:51 PM	Yes	Teacher Web

Adding an Itinerant Employee

An itinerant employee is an employee who can work at more than one location. You can select multiple schools on the employee's General Information screen by holding down the **Ctrl key** as you click.

In the example below, the person entering the information clicked on Vanderbilt High School; then while holding down the **Ctrl key** on the keyboard, clicked on Williams High School. As a result, they're both highlighted. You can select as many schools as you need this way.

The screenshot shows a form with the following fields:

- Pin:** 4553
- Pin Expired:**
- Pin Expires:**
- School(s):** A multi-select dropdown menu containing:
 - Hamner High School
 - Vanderbilt High School (highlighted in blue)
 - Williams High School (highlighted in blue)
 - VC Middle Schools
- Gender:** none selected
- Room:** Main Office
- Start Date:**
- End Date:**
- Birth Date:**
- Start Time:** (indicated by a red arrow)
- Half Day Break (1st Half End/2nd Half Start):**
- End Time:**
- Hours Per Day:** Override

For most employees, you can leave the Start/Half Day Break/End Times blank if you want the school's defaults to apply. However, for an itinerant employee, more than one school's default times apply. You must define these times for itinerant employees. The times you set will determine the following types of absences:

- **Full Day:** From Start Time to End Time
- **Half Day AM:** From Start Time to the first Half Day Break Time
- **Half Day PM:** From the second Half Day Break time to the End Time

If the predefined Full/Half Day Times will not work for an itinerant employee's absence, he/she can customize the absence to reflect accurate information. Once an absence is created for an itinerant employee, the substitute will know exactly where to be and at what times, and the principals will know about the absence without having to check a special report – it will be on the same reports as their other employees.

Creating an Absence for an Itinerant Employee

Refer to the Absence Data section [Chapter 8] to see how an absence is created for an itinerant employee.