

## Inactivating All Substitutes for the Summer

Many of you may inactivate your substitutes for the summer and then reactivate them based on a certain criteria or once the substitute submits a particular form. Here are some instructions on how to quickly accomplish this.

### Step One: Pull the substitute information out of Aesop using Report Writer

1. Go to: **Reports > Report Writer**
2. Click the Create New link in the **Substitute Information** section
3. Drag-and-Drop **Identifier** into the *Reports Field* section
4. Click the **Filter, Group, Sort** tab
5. Drag-and-Drop **Active** into the *Filters* section
6. Check only the **Yes** checkbox
7. Change the **Report Name** (example: "Sub Identifiers")
8. Click **Save & Run**
9. Check the **Excel Compatible (csv)** checkbox
10. Click **Run**
11. Click the Download as Excel Compatible (CSV) hyperlink
12. In the *File Download* dialog box click **Save**. Save it somewhere easy to find because you will need this file later

### Step Two: Apply the Inactive field to the substitutes using the import feature

1. Go to: **Extract/Import > Import Templates**
2. Click the Template link under **Substitute Load**
3. Click **Save** in the *File Download* dialog box
4. Select a location to save at (Typically the **Desktop**)
5. Copy the Identifiers from the CSV file (from Step One) and paste into the **Substitute Load > Identifier** column (column A)
6. Put **N** in the **Active** column (column H) for all entries
7. Now **Save** the file (this is the file you will be importing in step 10)
8. Go to: **Extract/Import > Import Data**
9. Object type - use drop down window to select **Substitute**
10. File - click the **Browse** button and find the file you saved in step 7 and click **Next**
11. Preview Import - Click the **Submit Import** button at the bottom of the page
12. Import Options - leave **Load all data that does not contain errors** marked, click **Submit**
13. Aesop will take you to the **Import Status** screen where you can view the progress of your import

\* **Note:** To re-activate all substitutes just re-run the same excel spreadsheet but first change the **Active** column entries (from step 6) from "N" to "Y"