

Web Navigator User Manual

Substitute Settings





Substitute Settings Overview

The Substitute settings enable you to add new substitutes or modify existing ones. You can also control which schools they are allowed to view jobs from, and you can quickly access Fulfillment History and Performance reports.

Adding a Substitute

From the Main Menu Bar select *Master Data* > *Substitute* > *Add*. Then fill in the General Information for the new substitute.

Web Navigat	or	Master Data	Abs	ence/	Vacanc	y	Reference l	Data S	ecurity	Reports
		Organization I	Inform	ation	(Alt+O)		•	Å	
CREATE ABSEN		School (Alt+I)				AILY REPORT	VERITIME	SCHOO	
<u>Aesop Edge</u>	Cla	Employee (A	it+W)							
<u>Weekly Abse</u> Date	nce #	Vacancy Profi	le				ulfilled 🖉	III Rate		e <u>[My prof</u> e Eric Owe
03/26/2013	Abs	Substitute (A	Alt+S)				Add			I D
03/28/2013						<u>_</u>	General Ir	nformatio	n	
	1						Address			@د کا
Aesop Inform	atio	n Alerts					Permissio	ns		
Subject				Mess	age					
School Date				Dlea	co cot	tun e	Skills			





General Information Page

Each substitute has a general information page that holds information such as the sub's Identifier, PIN, active status, email, and more.

	Substitute Baker, Tom Addition General Information Last Update: 2/15/2013 10:200 AM Login to Web Si Remove Edit Apply Changes Cancel Fields marked with an asterisk * are required.	
First Name	Middle Name	Last Name Active
* Tom		*Baker 2
Salutation	Date of Birth	Join Date
	02/10/1980	
Identifier	Phone (login id)	
* BAKER55346 3	* 8647357367 4	
Pin	Pin Expired	Pin Expires
* 1212 <u>Change R</u> 5		
Alternate Login ID (8,9,11-20 characters)	External ID	E-Mail
		4thdoctor@gmail.cd

Login to Web Site: Clicking this link will log you directly into this substitute's web site. Note: this will also log you out of your Web Navigator session.

Active: marking the substitute as inactive keeps the data for record-keeping, but stops interaction with Aesop.

Identifier: The identifier is a unique designation that is given to all substitutes. It can be alpha-numeric and up to 30 characters.



Phone (Login ID): by default Aesop uses the phone as the login ID.

PIN: this number will be used in conjunction with the login id for the substitute to login to Aesop. The PIN can be set to expire but this is not recommended.



E-mail: It is recommended that substitute email addresses are put in so they can receive email notifications.





General Information Page (Continued)

Notes Mr. Baker speaks fluent Mandarin Chinese	1	Language English	
Ethnicity	Send Email Notifications		
Pay Code	Name Recorded	Substitute in Multiple Districts	
Regular Sub Rate	Yes 5	Yes	
Permanent Substitute	Permanent Substitute Rank	Gender	
3		Male	
	Remove Edit Apply Changes Cancel Fields marked with an asterisk * are required.		

Language: Here you can change the Substitute's language is Aesop.

Pay Code: a pay code can be assigned to this substitute so the code will be attached to any absence they accept.

Permanent Substitute: if this substitute is a Permanent Substitute you can choose which school and rank them here.

Remove: deletes substitute from the database and removes all historical data.



Substitute in Multiple Districts: Does this particular substitute work in other Aesop districts?

Finishing the Task

Immediately after clicking on Apply Changes, check the Address, Permissions, Skills, and Preferred Substitutes Lists tabs to ensure this person is set up exactly as you need.





General Information	Permiss	ions	Configuration	Settings	Schedule	Preferred Substitute List	s Reports	
Substitute General	Address	Resur	ne & Photo					
Select Another Subs	titute) Ad	ld a Su	i <u>bstitute</u> 🕑	Send Le	etter/Email			
			5	Substitute	e: <u>Baker, T</u> Substitute /	om 😭 😭 🏫 🈭 🕯 Address		
Address 1								
Address 2								
Address 3								
Address 4								
City		_			State/Prov			Zip
					none sel	ected	•	
			E	dit	pply Changes	Cancel		
			Fie	lds marke	d with an asl	erisk * are required.		

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.

Resume & Photo

You can store resumes and photos of the substitutes in Aesop. They can also be uploaded by the substitutes if you allow.

General Information	Permission	S Configuration Setting:	Schedule	Preferred Substitute Lists	Reports
Substitute General	Address R	esume & Photo			
Select Another Subs	titute। Add	a Substitute 🥑 Send	.etter/Email		
		Substitu	te: <u>Baker, T</u> Substitute	om ☆☆☆☆☆ Address	
Substitute Resume	& Photo				
Upload Restrictions					
Substitute may i	upload Resi	ume			
Substitute may i	upload Phot	:0			
Resume File					
BAKER-Tom-701835	.doc				
Photo File					
No photo on file					
Edit Apply Chang	les	Cancel			
Fields marked with an	asterisk * ar	e required.			
			26		

General Information Permissions Configuration Settings Schedule Preferred Substitute Lists Reports
Substitute General Address Resume & Photo
Select Another Substitute Add a Substitute 🔍 Send Letter/Email
Substitute: <u>Baker, Tom</u> Substitute Address
Substitute Resume & Photo
Upload Restrictions
Substitute may upload Resume
Substitute may upload Photo
Resume File
BAKER-Tom-701835.doc
Photo File
No photo on file
Edit Apply Changes Cancel
Fields marked with an asterisk * are required.
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Permissions

This section governs how a substitute is permitted to interact with Aesop.

- Allows them to Search for jobs
- Allows a sub to Cancel an accepted job
- Allows a substitute to choose which schools they prefer to work at





Skills

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

General Information Permissions Configu	ration Settings Schedule Preferred St	ubstitute Lists Reports				
Skills Preferred Schools						
Select Another Substitute Add a Substitut	e 🥑 <u>Send Letter/Email</u>					
Substitute: Baker, Tom Skills						
	Edit Apply Changes Cance	1				
Skill Description	Skill Expiration	Substitute Has Skill				
Aide		\checkmark				
Certified Teacher						
Espagnol						
	Edit Apply Changes Cance	1				

To add a new skill to a substitute, click the Add New Skills link.

Select Another Substitute Add a Substitut	te 🤍 <u>Send Letter/Email</u>	
View Current Skills	Substitute: <u>Baker, Tom</u> *** ** Skills	l
	Edit Apply Changes Cancel	
Skill Description	Skill Expiration	Substitute Has Skill
Calculus	¹	
Nurse	1	
Physical Education	ī	☑ 2
<u>Spanish</u>	1	
Special Education		
	Apply Changes Cancel	

1 Enter the date you would like this skill to expire. If you leave the date blank the skill will be assigned to the sub indefinitely.

Check the box for the skill(s) you would like to assign to this substitute.

Click **Apply Changes** to save the changes.

3







Preferred Schools

Aesop allows your substitutes to pick and choose the schools where they are willing to work. There are two major sections to this feature:

	General Inform	ation Per	missions	Configuration Settings	Schedule	Preferred	Substitute	Lists	Reports			
	Skills Preferr	ed Schools										
	Select Another	Substitute	Add a S	<u>ubstitute</u> 🥑 <u>Send Le</u>	etter/Email							
				Substitut	e: <u>Baker, To</u> Preferred S	om 😭 🏫						
	Substitute	wants to s	ee jobs a	t schools selected be	low.							
U	🔘 Substitute	does not v	vant to se	ee jobs at schools sele	ected below							
			Appl	/ Changes								
	Add Schools											
	Updates Succe	essful.										
				Edit	Apply Chang	es Canc	el					
								Da	ay Of We	eek		
	Selected			School		Sun	Mon	Tue	Wed	Thu	Fri	Sat
2	V	Victoria Co	ounty Cor	mmunity Schools		1	1	1	1	1	1	1
	1	Walke	r Middle S	School		\checkmark	1	\swarrow	1	1	1	~
				Edit	Apply Chang	es Canc	el					

Header: tells Aesop how to view the list

Details: tells Aesop the specific school(s)





	Substitute: <u>Baker, Ton</u> Preferred Sc	<u>n</u> 🖈 🖈 i hools	ir sir si					
	wants to see jobs at schools selected below. does not want to see jobs at schools selected below. Apply Changes							
	Edit Apply Changes	Cano	el					
				Da	y Of We	eek		
Selected	School	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	Victoria County Community Schools	1	~	1	1	~	~	\checkmark
1	Walker Middle School	1	1	1	1	1	1	1
	Edit Apply Changes	Cano	el					

To add a new school to the substitute, click the Add Schools link.

		chools	ninini					
	Edit Apply Chang	es Ca	ncel					
		-			ay Of We		- •	
Selected	School VC Elementary Schools	Sun V	Mon	Tue V	Wed	Thu	Fri	Sat ▼
	Columbia Elementary School	 ✓ 	 ✓ 	 ✓ 	 ✓ 	▼	 ✓ 	 ✓ ✓
	Jaspers Elementary School 2		 ✓ 	 ✓ 	 ✓ 	▼	✓	 ✓ ✓
	Sawyer Elementary School		 ✓ 	 ✓ 	 ✓ 	▼	✓	 ✓ ✓
	VC High Schools_	 ✓ 	 ✓ ✓ 	 ✓ 			 ✓ 	
					V	V		V
	Hamner High School	1	1	✓	v	V	1	<
	Vanderbilt High School	1	v	1	1	1	1	✓
	Williams High School	1	1	1	1	V	1	v
	VC Middle Schools	1	1	1	1	1	1	v
	Dell Middle School	1	1	1	v	V	1	V
	Apply Chang	es Ca	ncel	-	-		-	

1

2

Click the "Selected" box to the left of the school(s) you wish to select

Click the "Day(s) of Week" that this applies (optional)

3 Click Apply Changes to save*



You must tell Aesop Where to allow the sub to go!

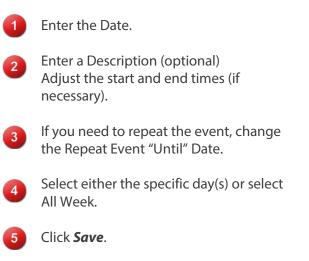
Substitutes only have access to the school where you place them, as well as to any school grouped under the list where you place them. This access is under the Preferred Substitute Lists > Schools tab [page 7-6] for each substitute. The Preferred Schools page is subject to your other settings.

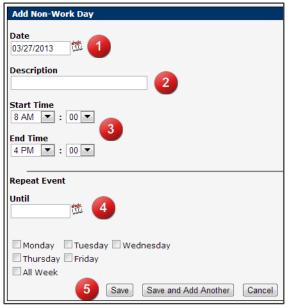
Non-Work Day

Non-Work days can be created for Substitutes indicating their unavailability. The Substitute can create them as well.

	issions Configuration Settin	gs Schedule Preferred Substitute Lists Reports			
Non-Work Day Call Times					
Select Another Substitute	Add a Substitute 🧐 Send	d Letter/Email			
Substitute: <u>Baker, Tom</u> ***** Substitute Non-Work Day <i>®</i>					
Add Non-Work Day Date	Duration	Comments	Delete		
02/21/2013	23:59		The second secon		
05/21/2012	23:59	Doctor's Appointment			
05/08/2012	23:59		杳		
05/07/2012	03:00	Doctor's Appointment	徸		
04/30/2012	03:00	Doctor's Appointment			

To add a Non-Work Day to the sub's profile, click the <u>Add</u> <u>Non-Work Day link</u>.











Call Times

Substitutes can adjust the times Aesop calls.

General Information Permissions C	onfiguration Settings Schedule Preferred	d Substitute Lists Reports						
Non-Work Day Call Times								
Select Another Substitute Add a Sub	stitute 🥘 Send Letter/Email							
Substitute: Baker, Tom Call Times								
Define call Times								
	Current call Times	;						
Start Time	End Time	Day of Week						
06:00	21:00	Monday						
	Current Call Time Disclaimer Acc	eptance Status						
Status	Disclaimer Text	Accepted Date						
Not Accepted								

To adjust a sub's call times, click the <u>Define call Times</u> link.

			Define (Call Times		
Call Times						
Your district h	as defined av	ailable call times:				
Morning: 5:30 Evening: 4:00						
You have furth	er defined you	ır call times as liste	d below.			
Sun	Mon	Tue	Wed	Thu	Fri	Sat
Call Anytime	6:00 AM 9:00 PM	🚡 Call Anytime	Call Anytime	Call Anytime	Call Anytime	Call Anytime
	9.00 PM					
Choose From	Below					
Specify Ca	ll Times					
🔘 Specify No	Call Days					
🔘 I Prefer no	t to be called	by Aesop				
Next Can	cel					

Select either: Specify Call Times, Specify No Call Days, or I Prefer not to be called.

Click the Next button





	Specify Call Times
	Start Time 08 AM : 00
1	End Time 04 PM 💌 : 00 💌
2	Select a day
	3 Apply Changes Cancel

Adjust the start and end times.



Select the days that the sub may be called.

Click **Apply Changes** to save.

Something to note:

If you selected "I prefer not to be called by Aesop," there is no Apply Changes button. You are finished after clicking **Next**. This setting applies only to Aesop calling the substitute. Substitutes can still logon proactively via the phone or Web.

Preferred Substitute List (School)

Give the substitute access to look for jobs. Select the "School" tab under the Preferred Substitute Lists tab. **School Level: 1** setting will suffice for most districts. On this level, a substitute is eligible to view jobs from the entire district.





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Adding a new school to the Preferred Substitute List:

- 1. Click the <u>Add New Schools</u> link
- 2. Click the "Selected" box to select the school
- 3. Click the Apply Changes button to save

See the chapter on preference lists for more details.

Forgetting this step will prevent the substitute from looking for jobs and his or her name will not appear on the Assign Substitute screen.





Preferred Substitute List (Employee)

This list shows all the employees who have chosen this individual as a preferred substitute. This substitute will be called first for all jobs registered for these employees.

General Ir	nformation F	ermissions	Config	guration	Settings	Schedule	Preferre	ed Subst	itute Li	sts Rep	ports		
School	Employee		•				-						
Select And	ther Substitu	ute) Add a	a Substitu	<u>ite</u> 🕐 j	Send Le	etter/Email							
						Sub	stitute: <u> </u> Em <u>Job \</u>	Baker, ployee Visibility	Lists	()	irs)		
Add New B	Employees												
					Plea	ise type th	e first fe	ew lette	ers.			Search	
♥ View A ♥ View E ♥ View Ir	xcludes												
							Edit	pply Cha	nges	Cancel]		
					% Lei	ad Time		opply Cha			Visibi	lity	Comments
Selected	Employee	Exclude	Include	Call Order	Default		Min Default	Visibili	ty #	Max Default	#	lity # Hours	Comments
Selected	Bauer,	Exclude ()	Include	Call Order N/A	Default		Min Default	Visibili #	ty # Mins	Max Default	# Days	#	Comments
		1		Order	Default		Min Default	Visibili # Hours	ty # Mins	Max Default	# Days	# Hours	Comments
	Bauer,	1		Order	Default		Min Default	Visibili # Hours	ty # Mins	Max Default	# Days	# Hours	Comments
	Bauer,	٢		Order	Default		Min Default	Visibili # Hours	ty # Mins	Max Default	# Days	# Hours	Comments
V	<u>Bauer,</u> Jack	٢	0	Order N/A	Default N/A	Override	Min Default N/A	Visibili # Hours	ty # Mins	Max Default N/A	# Days	# Hours	Comments
V	Bauer, Jack	٢	0	Order N/A	Default N/A	Override	Min Default N/A 24h	Visibili # Hours	ty # Mins	Max Default N/A	# Days	# Hours	Comments

Adding a new employee to the Preferred Substitute List:

- 1. Click the Add New Employees link.
- 2. Search for the employee.
- 3. Click the "Selected" box to select the employee(s).
- 4. Click the Apply Changes button to save

See the chapter on preference lists for more details.





Fulfillment History

General Informa	tion Permissions			Preferred Substit	usta Linta I D	leports				
		Configuration Setting	gs Schedule I	Preferred Substi	tute Lists K	reports				
Fulfillment Histo	ry Available Jobs	Performance Job \	Visibility Hierarchy	Communicati	ons to Substit	itute Change Log	Login H			
Select Another Substitute Add a Substitute 🧐 Send Letter/Email										
	Substitute: Baker, Tom 😭 😭									
		Fulfilln				ell as the past 36	6 days			
	Feedback	Feedback	-		-					
CONF# A	BOUT Substitute	Left by Substitute	Employee	Start Date	Length	School				
			Chesterton, Ian	02/22/2013	1.00 Dav	Walker Middle Sch	aal			
<u>99193851</u>			chestereon, ran	_ 02/22/2015	1.00 00,	Walker Flidare ben	001			

The Fulfillment History shows you all jobs worked for the past 366 days as well as jobs scheduled 366 days in the future. You can view feedback by clicking the Details link. Check the Days column to see if this absence is a one day absence or a multiple day absence.

Available Jobs

General Information	Permissions	Configuration S	ettings Schedule F	Preferred Substitute List	s Reports	-			
Fulfillment History	Available Jobs	Performance	Job Visibility Hierarchy	Communications to :	Substitute	Change Log	Login History	Call History	
Select Another Subs	titute) Add a Su	<u>ibstitute</u> 🕐 <u>S</u>	Send Letter/Email						
			Please note, Jo	titute: <u>Baker, Tom</u> Available Job bs will not appear if the	5				
Carl Dec. (A)	ool 🔘 Date/Emplo	oyee 🔘 School/	/Date 🔘 Employee/Dat	te Go					
	Starting Scho	ool		Employee	Title				CONF#
Start Date	Starting Schoor Vanderbilt Hi			Employee Fox, Tim		School Scienc			CONF# 106019182
Sort By Date/Sch Start Date 04/01/13 Date 04/01/13 (Mon)	-		To 3:15 PM			School Scienc Schoo			

The Available Jobs report shows you all jobs this substitute is able to accept. This is the same information the substitute would see on their Web site or hear on the phone.





Performance

General Information Permissions Configuration Settings Schedule Preferred Sul	bstitute Lists Reports
Fulfillment History Available Jobs Performance Job Visibility Hierarchy Communi	cations to Substitute Change Log Login History Call History
elect Another Substitute Add a Substitute 🥑 Send Letter/Email	
	er, Tom 全全全全全 ice for the last 90 days. ⑧
Status	Where Count
Single Absence Assigned	Teacher Web 5
Single Absence Assigned	Web Navigator 10
Single Absence Accepted	Outbound Call 1
Single Absence Rejected	Outbound Call 6
All Absences Rejected	Outbound Call 2
Unknown Status	Outbound Call 2
Hang-up	Outbound Call 32
	Outbound Call 63
Ring No Answer	

The Performance report shows how the substitute has interacted with Aesop the last 90 days.

To view the report in more detail, click the <u>Details</u> link.







Job Visibility Hierarchy

Job Visibility Hierarchy shows if the substitute is able to view jobs from the particular school.

					~			1
General Info	ormation	Permissions	Configuration Set	tings Schedule	Preferred Substitute Lists	Reports		<u> </u>
Fulfillment H	listory A	Available Jobs	Performance Jo	ob Visibility Hierarc	hy Communications to S	ubstitute Change Log	l 🗸 🗌	Jaspers Elementary School (2)
<u>Select Anoth</u>	ier Subst	iitute) <u>Add a S</u>	ubstitute 🧐 Se		bstitute: <u>Baker, Tom</u> 🖇	rdententente	~	Sawyer Elementary School (3)
School Li	ete (All le	avole)		s	(~)	VC High Schools (1)		
© School Li © School ar	sts (1,2)							The number in
			Job Visibility		tion (Victoria County S : 100% ; Min: 1 Hour (Days O Hours	parentheses indicates the
List Type	Inc Exc	List Name			% Lead Time Visibility	Min Visibility	Max Visit	
School	1	Victoria Cou	nty Community 9	Schools	100%	11 Hours O Minut	tes 30 D	the school who have this
School	×	<u>Administra</u>	tion Building					substitute on their
School	(🖌)	Beacon Sc	hool		100%	11 Hours 0 Minut	tes 30 D	preference list.
School	(🖌)	VC Elemen	tary Schools (1	1)	100%	11 Hours 0 Minut	tes 30 D	
School	(*)	<u>Columbia</u>	Elementary Scl	hool_(1)	100%	11 Hours 0 Minut	tes 30 D	

The green checkmark (✓) indicates the sub is on the school's preference list and they are able to view jobs.

The red X (\mathbf{x}) indicates the sub is not on the school's preference list or they have been excluded at this school and they are not able to view jobs.

If a symbol is in parentheses, the substitute's settings for that school are derived from the parent level, and the substitute is not actually listed on that list.

You have 3 view options:

1. School Lists (All Levels)

2. School Lists (Levels 1,2)

3. School and Employee Lists

Communications to Substitute

The history of the Letter Writer letters sent to this substitute can be found here. Letter Writer letters can also be sent to the substitute from this page.





General Information Permissions	Configuration Settings Schedule P	referred Substitute Lists Rep	orts					
Fulfillment History Available Jobs F	Performance Job Visibility Hierarchy	Communications to Substitute	Change Log	Login History Call History				
Select Another Substitute Add a Sul	bstitute 🥝 <u>Send Letter/Email</u>							
Substitute: Baker, Tom Article								
		Send a new letter or email nplate: Substitute Welcome I	etter Template	- 1				
		Print Letter Send Email	2					
Name	Generated	Su	cessful?	Delivery Method				
Substitute Welcome Letter Template	3/29/2012 11:	45:32 AM Yes		Letter				

To send a letter from the Communications to Substitute page:



Choose the letter template you would like to use.



Click the **Send Email** button.

Change Log

		(<u> </u>		<u> </u>				
General Information F	ermissions	Configuration Settings Sch	edule P	referred Substitute L	ists Rep	orts			
Fulfillment History Ava	ilable Jobs	Performance Job Visibility I	Hierarchy	Communications to	o Substitut	e Change	Log Login Histor	y Call History	
<u>Select Another Substitu</u>	ite) Add a S	Substitute 🥑 Send Letter/	'Email						
			Subst	itute: <u>Baker, Tom</u>	***	**			
Change Log									
	Start	Date: 02/28/2013	End Date		🖞 Cate	gory: All		▼ Go	
	Juli	Date: 02/20/2013	Linu Date						
Date	Action	Object	Field		Dld	New Value	Who	Where	Category
Date 3/27/2013 2:52:36 PM			Field		Dld		Who Nav. Super User		Category Preferred Schools
	Removed		Field		Dld		Nav. Super	Where Web	

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





Login History

General Information	Permissions	Configuration Set	tings 🖌 Schedule 🕇 P	referred Substitute Lists	Reports			
Fulfillment History	Available Jobs	Performance Jo	b Visibility Hierarchy	Communications to Sub	stitute	Change Log	Login History	Call History
Select Another Subs	stitute) Add a S	Substitute 🤍 Se	end Letter/Email					
			Subst	itute: <u>Baker, Tom</u> 😭 Login History	****			
		Sta	art Date: 02/28/201	3 🤷 End Date:		1	Go	
	Logged In			Logged Out		Tim	ed Out?	Wh
3/5/2013 11:37:12	AM		3/5/2013 1:01:58	PM			Yes	Substitute Web
3/25/2013 10:05:0	6 AM		3/25/2013 12:03:	17 PM			Yes	Substitute Web

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

Call History

General In	formation	Permissions	Configuration	Settings Schedule	Preferred Su	ubstitute Lists Report	5			
Fulfillment	History	Available Jobs	Performance	Job Visibility Hierard	hy Commur	nications to Substitute	Change Log	Login History	Call History]
Select Another Substitute Add a Substitute 🔍 Send Letter/Email										
Substitute: Baker, Tom AAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA										
Date	Time	Direction	Status	Line	Substitute	School		Start Date I	ind Date	Confirmation #
02/26/2013	4:00 PM	0	Aborted	Answer	Baker, Tom	Vanderbilt High Sc	hool	02/28/2013 0	2/28/2013	97792059
02/26/2013	5:15 PM	0	Aborted	Answer	Baker, Tom	Vanderbilt High Sc	hool	02/28/2013 0	2/28/2013	97792059
02/26/2013	6:31 PM	0	Aborted	No Answer	Baker, Tom	Vanderbilt High Sc	hool	02/28/2013 0	2/28/2013	97792059

View all outbound phone calls from Aesop to the substitute, as well as all inbound phone calls to Aesop from the substitute. This report also displays the details of these calls.

