AESOP User Guide for Campus Users

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Introduction

This Campus User Guide will cover most of the features of the AESOP website. Be aware that since AESOP is a permission-based system you may see some features here that you do not have permission to view or access.

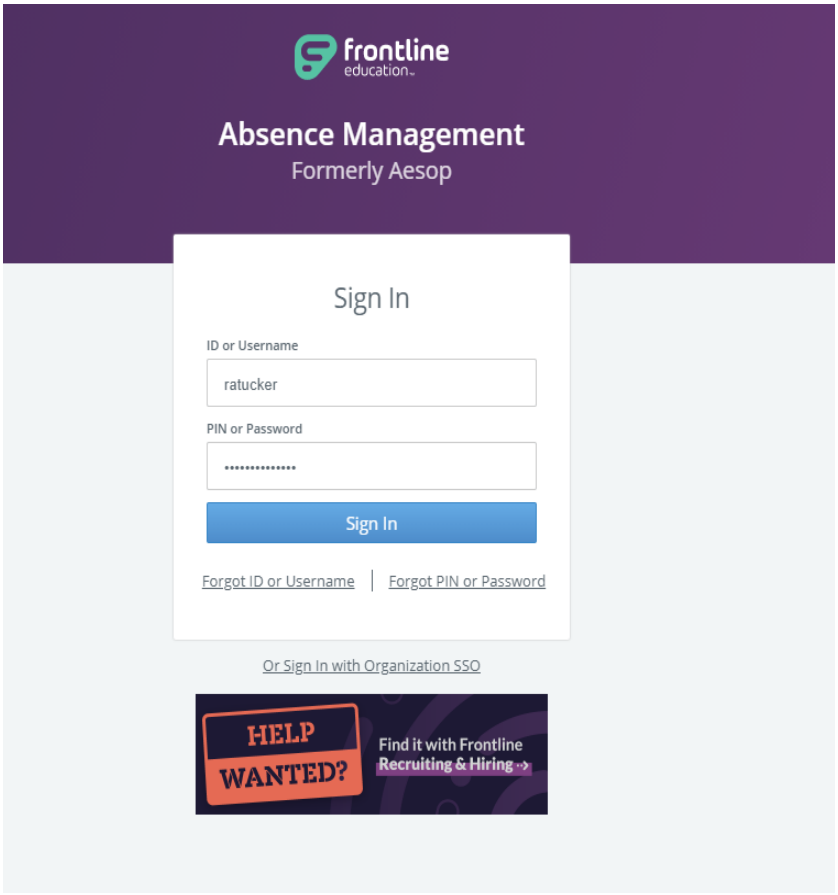
Depending upon your position at your school, you may have both an employee login and a campus user login. This should be set up so that you can toggle back and forth from the two different logins without having to have two completely different usernames and passwords. If you do not have that option, please contact the Custodial Service Department at 801-402-7880 for assistance.

All of the information contained in this document can only be view while logged into your Campus User profile. Be sure that you are in the correct profile before attempting any of these procedures.

~Desktop~

Logging In

The first step to log on to AESOP is to visit the website. Type www.aesoponline.com into your internet browser's address bar and hit the Enter button on your keyboard. This will take you to the AESOP website, enter your username and PIN on the following screen and click Sign In.

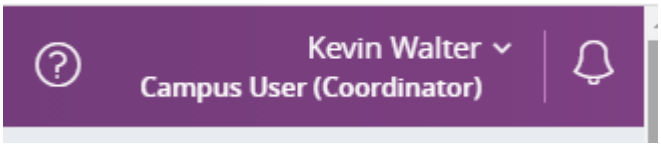


Forgot Your Username or Password?

If you have forgotten your Username and/or Password you can click on either of the links, Forgot my username or Forgot my Password. This will take you to a page where you can enter your email address and have a reminder sent to you.

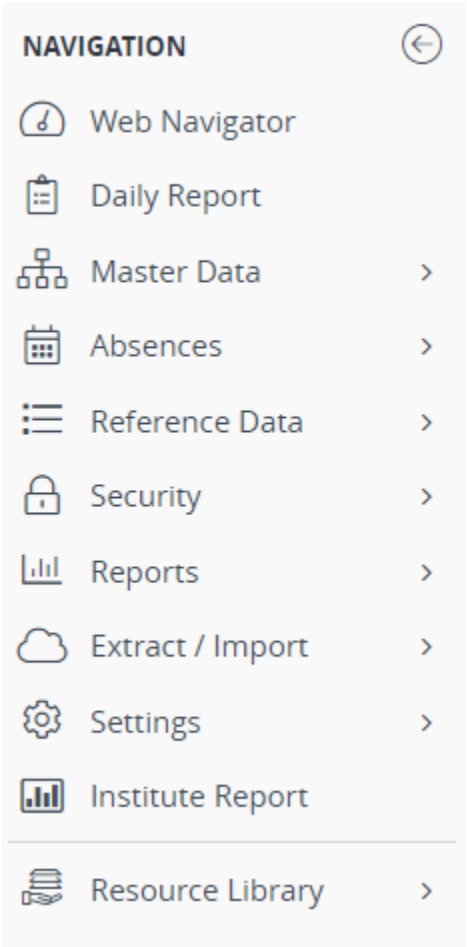
Home Page

For those campus users that are also employees that are submitting absences and/or time through AESOP, you will need to make sure that you are viewing your home page under the correct account. To verify, look under your name in the upper right-hand corner once you are logged into AESOP.
You should see the word Campus User under your name. If you do not, click on your name and select the campus user account from the drop -down.



Navigation

Under Absence Management on the left side of your screen, you will see that Navigation section. From here you will be able to navigate to the following areas:



Web Navigator - This will take you back to your main page from any screen within AESOP

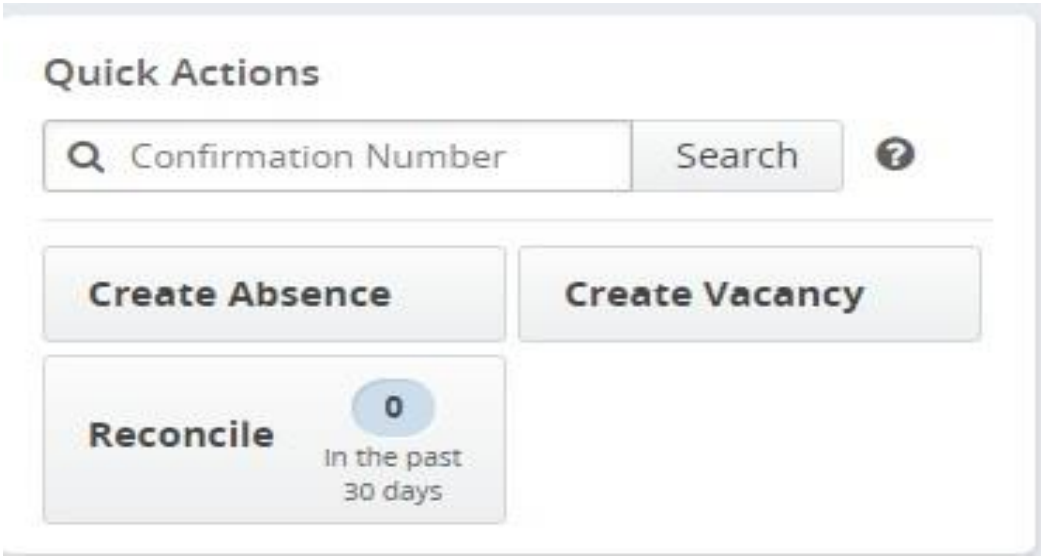
Absences - From this tab you can view and create absences

Reports - This section will take you to available reporting options

Settings - This section will take you to your personal setting as well as the school settings

Quick Actions

On the right side of your dashboard, you will have the options to search for an absence confirmation number, create and/or approve absences as well as create a vacancy.

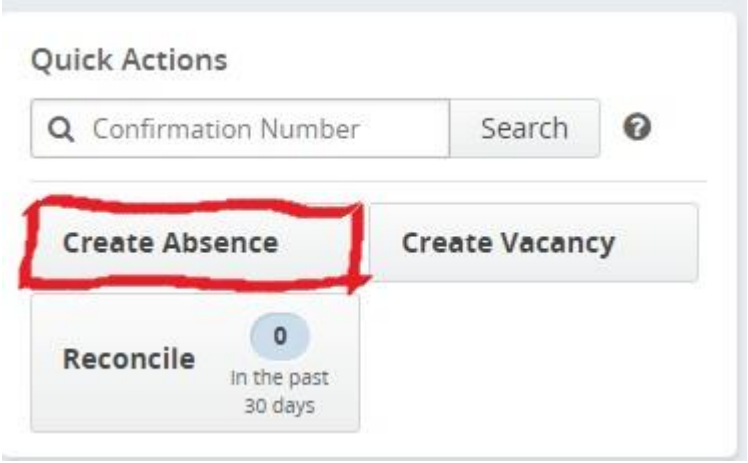


Absences and Vacancies

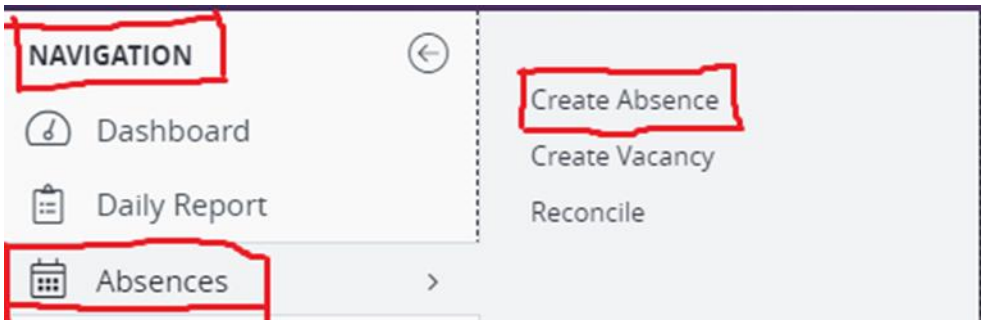
Creating an Absence

There are two places on the home page where you can access the page to create an absence for an employee.

1. You can click on *Create Absence* under the Quick Actions section on the right hand side of the screen.



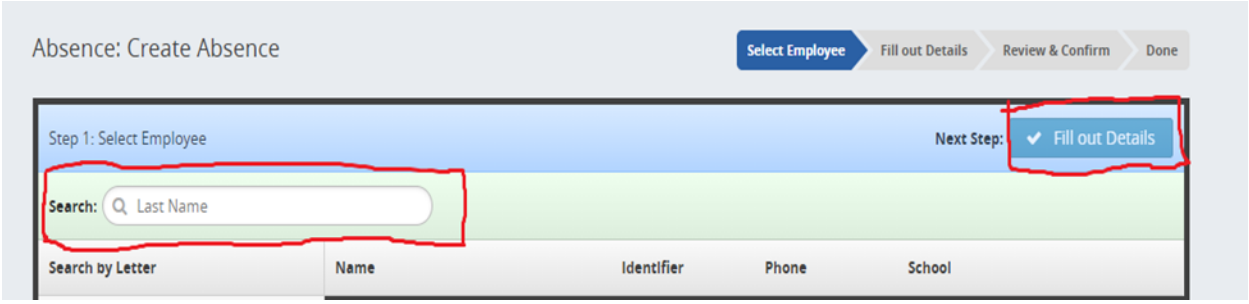
2. Under the Navigation section, click on Absences then Create Absence.



By using either of these options, you will be taken to a page where you can search for the employee you want to create an absence for. Simply begin typing the last name in the search bar on the right side of your screen. Once the employee's name appears, click the circle next to their name and then click the Fill *out Details* button.

Select Employee

The first step to create an absence is to select the employee you would like to create the absence for. You can search for the employee by their last name using the search box at the top of the page. Click the button next to the name of the employee you would like to choose and then click the green Fill out Details button to move on to the next step.

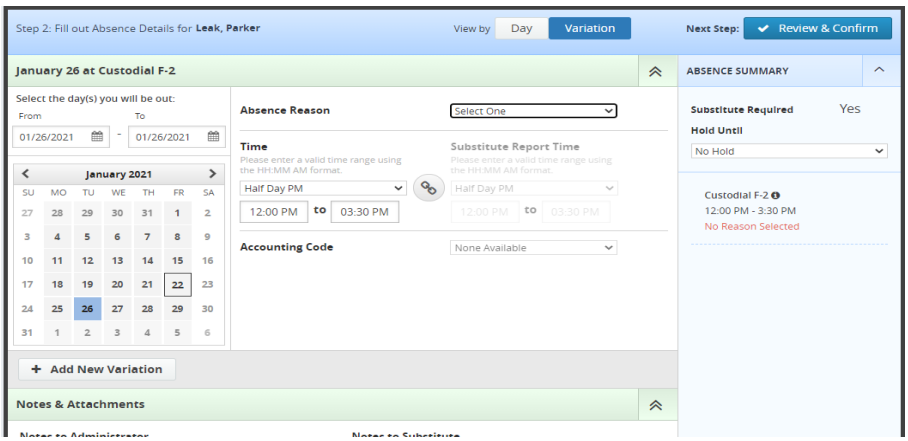


Fill Out Details

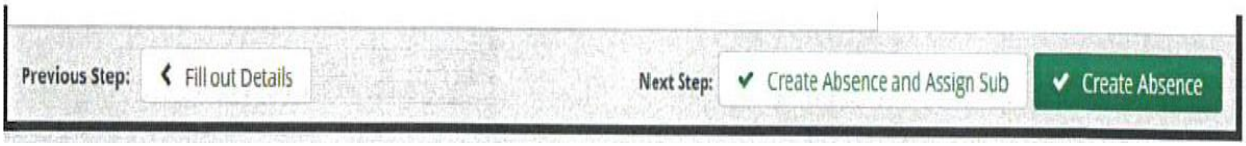
On the second step, you will fill out the absence details. You will need to complete:

- The date of the absence
- Absence Reason
- Time
- Substitute Required

Substitute Report Time (if different than the employee absence time) Once those sections are complete, click the *Review & Confirm* button.



You will then be shown the summary of the absence. If any details are left off or incorrect, click the *Fill out Details* button to go back to the previous screen. If all the information is correct, click *Create Absence and Assign Sub* (only if a substitute is needed and already contacted) or *Create Absence* (if a substitute is not needed or if one has not been chosen

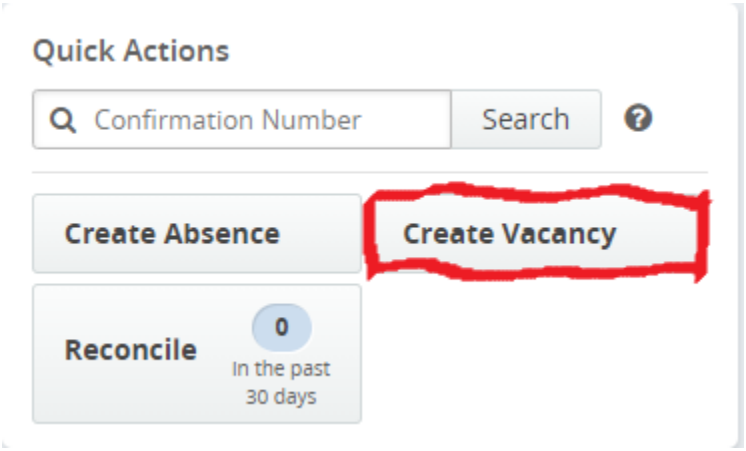


Creating a Vacancy

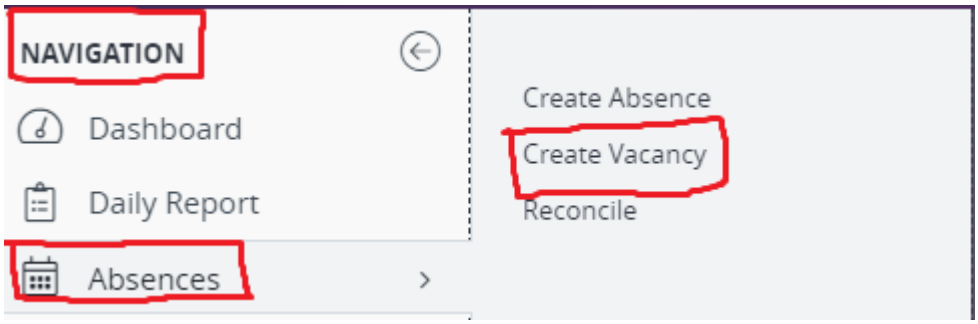
There may be a time that you are creating an absence for a vacant position. In this case, you do not have an employee to attach the absence to, you will need to create a vacancy instead. In most cases, as the campus user, you will be responsible for creating the vacancy and acquiring a substitute for the day. This option can be used in high schools if you are creating a absence for the Head Facilities Manager.

There are two places on the home page that you can access when trying to create a vacancy.

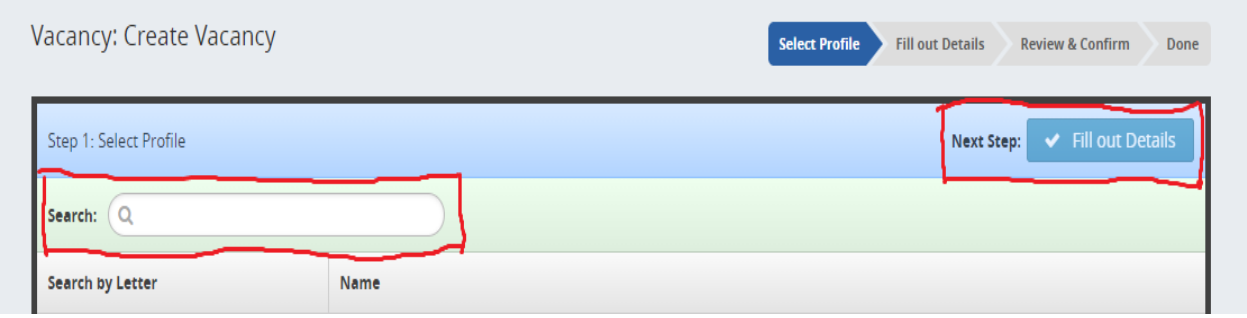
3. You can click on *Create Vacancy* under the Quick Actions section on the right-hand side of the screen.



4. Under the Navigation section, click on Absences then Create Vacancy.



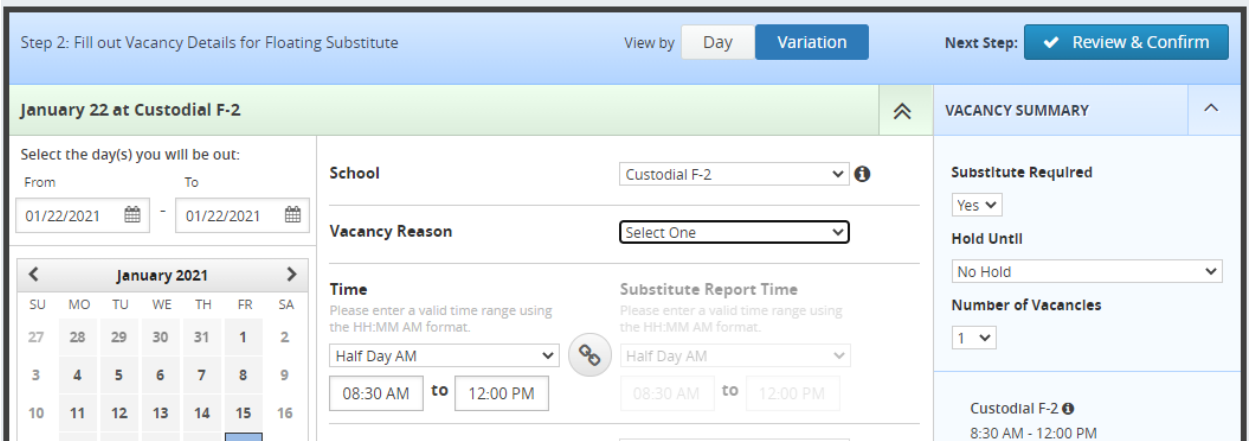
By using either of these options, you will be taken to a page where you can search for position you want to create the vacancy for. Simply begin typing the word ' vacancy' in the search bar on the right side of your screen. You will then see a list of the generic positions that you are creating the vacancy for, click the circle next to the applicable position then click the Fill *out Details* button.



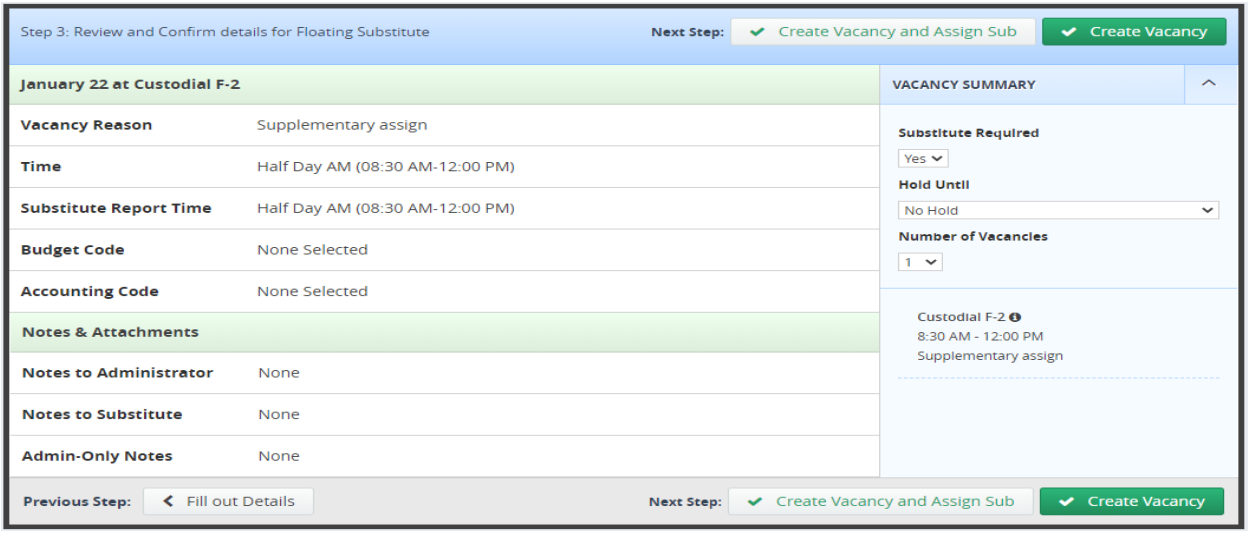
On the following screen you will need to complete:

- The date of the absence
- Absence Reason
- Time

Once those sections are complete, click the *Review & Confirm* button



You will then be shown the summary of the absence. If any details are left off or in correct, click the *Fill out Details* button to go back to the previous screen. If all the information is correct, click *Create Absence and Assign Sub* (only if substitute is needed and already contacted) or *Create Absence* (if substitute is not needed or if one has not been chosen).



Modify an Absence or Vacancy

Once an absence or vacancy is created you may, depending on your permissions, have the ability to edit details of the absence or even delete the absence completely.

To modify an existing absence, you can either:

- Enter the confirmation number in the *Quick Actions* section of your dashboard
- Search by the date of the absence by entering the date in the upper left side of your dashboard.

Once you have located the employee absence or vacancy, you will be able to click on the confirmation number to edit any necessary information.

On the modify page, you will see a few options. From this screen you can:

- Edit the absence - you can change the dates, time, or assigned substitute
- Split the absence - if this is a multiple day absence/vacancy, you can split it into multiple absences to allow different substitutes to take individual days of the absence or vacancy
- Delete the absence - if the employee is no longer taking the day off, you can delete the absence completely
- Reassign a substitute – if a substitute has already been assigned but is no longer available, you can reassign a new substitute if needed.

Absence Log

You can view all activity for a particular absence by clicking on the *Absence Log* tab. You can research who created the absence, who modified it, and when. Everything that has happened in regard to that absence will be available here.

Approver Log

You can view the workflow of the absence by clicking the *Approver Log* tab. This will show you who and when the absence was approved.

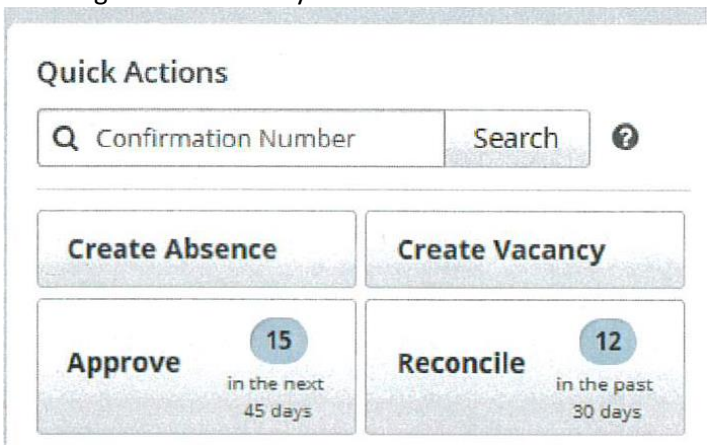
Absence Approval

As a Campus User, it may be your responsibility to approve employee absences for your school. This can be done while logged into your AESOP account. Please be sure that you are logged in as the campus user to ensure that your permissions are correct.

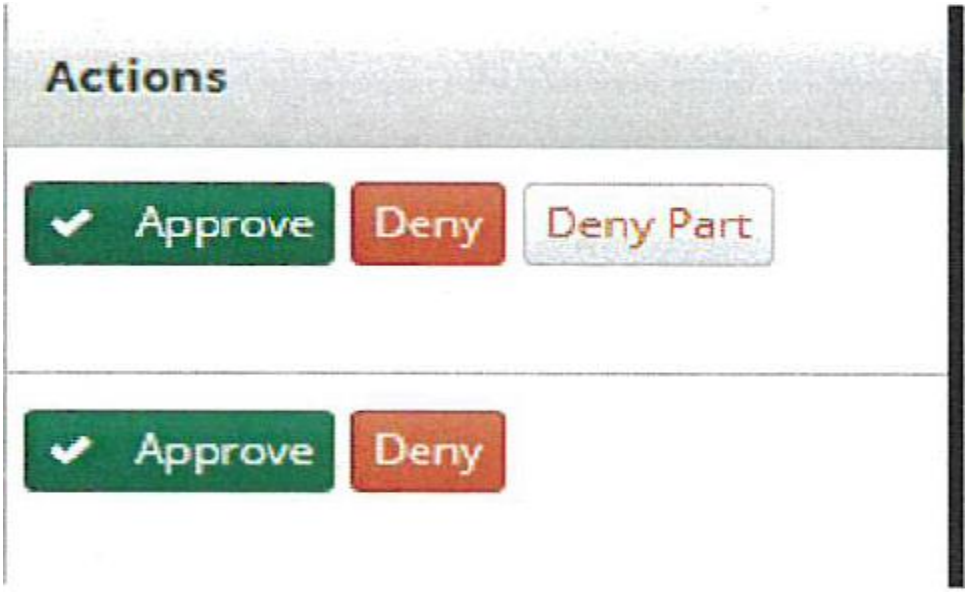
When an absence is created by an employee that you are responsible for approving, AESOP will automatically send you an email when the absence is submitted.

You can click the first link in the email to be taken to your AESOP site to approve the absence. Once you log in you **WILL** see the absence with *Approve* and *Deny* buttons. Click on the appropriate button to approve or deny the employee's absence.

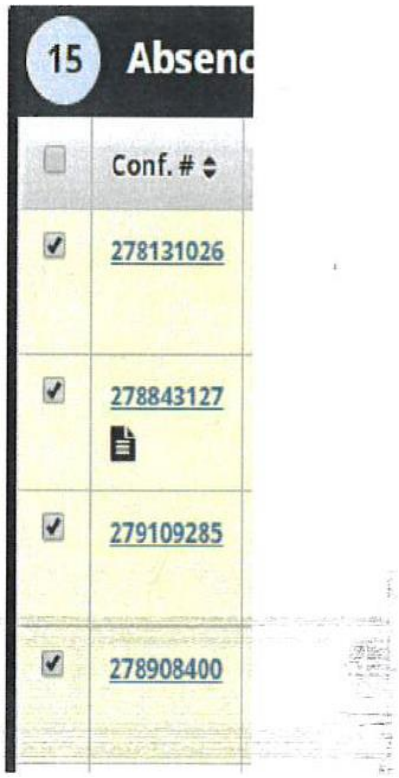
If you are already logged into your AESOP account, you can also click on the *Approve* button under the Quick Actions section on the right-hand side of your dashboard.



From this screen, you will see all the absences that are pending approval. You can approve or deny all the absences by clicking the appropriate button.



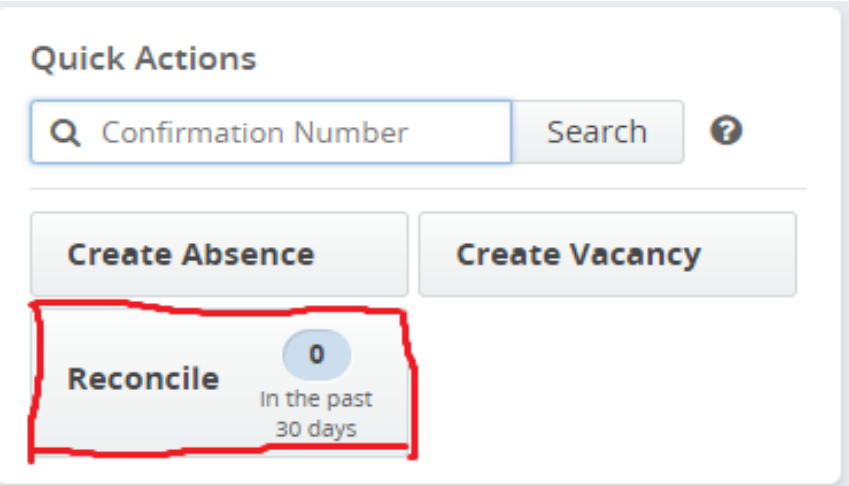
Your second option would be to select the box next to the absences that you would like to approve and then click *Approve Selected* in the upper right-hand corner.



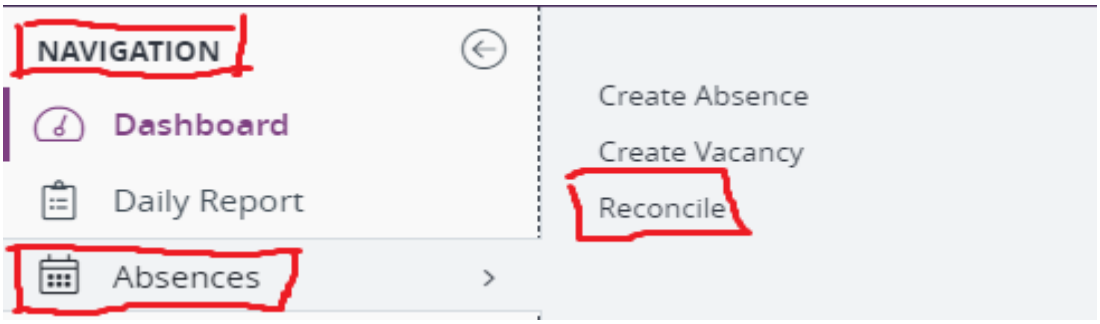
Reconcile Absences

Absences are reconciled or checked for accuracy before the information is put into the payroll system. As the Campus User, you are responsible for reconciling the absences for your school to ensure that the employee leave is correct, and the correct substitute has been assigned to certify accurate pay.

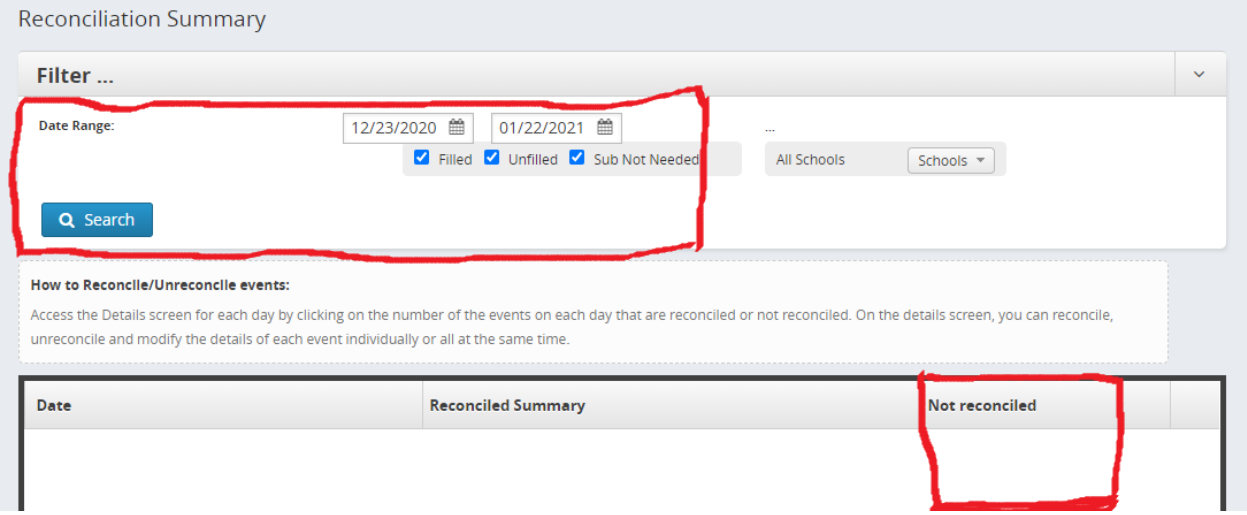
On the right-hand side of your dashboard, you will see Reconcile under the Quick Actions section. Click on this button to begin the process.



You can also select *Reconcile* under Absences in the Navigation section.



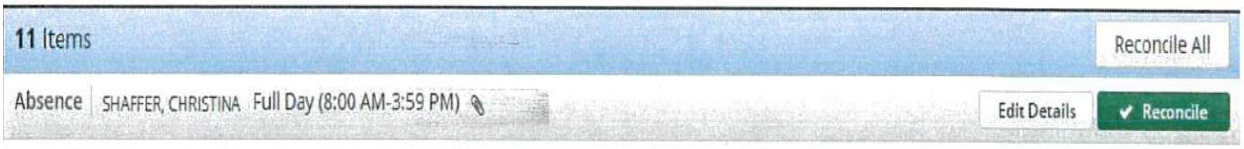
Once you have selected the option from either of these areas, you will see the list of all the absences to be reconciled. You can also enter a specific date range at the top of the screen if you are working on a specific period of time.



Under the column Not reconciled, you will see a button that has the number of absences that need to be reviewed. Click this button to be taken to the next screen.

From this screen, you can click edit to make any necessary changes by clicking the Edit button. This is the same process as described under the **Modify an Absence or Vacancy** section above.

From that screen, you can click the confirmation number hyperlink and it will take you back to the screen that looks like the screen where the absence was originally created. You can edit from this screen as well.

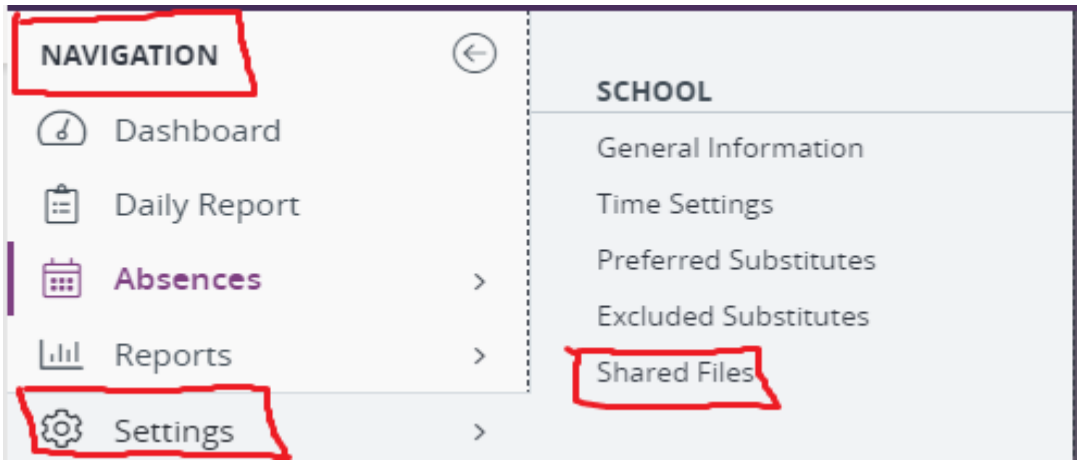


If the information is correct, then you can simply click Reconcile. If you have realized that you have reconciled the absence in error, you will still be given the option to reverse the process and then edit before reconciling the absence again.

Absence/Vacancy Files

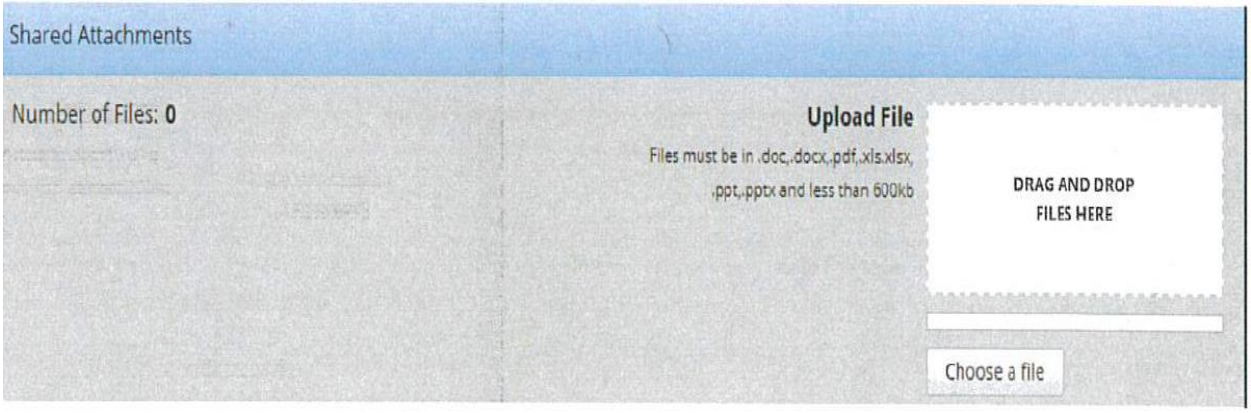
You can upload files that will be attached to every absence at your school for the period that you specify. This could be something like parking information, directions to your school, or anything that would be pertinent to the entire building.

To upload file, select Settings and then Shared Files under the navigation section on the



To upload a file, click the Browse button. This will open the file system on your computer where you can choose the file to upload.

Files must be in .doc, .docx, .pdf, .xls, .xlsx, .ppt, or .pptx format and no larger than 256kb.

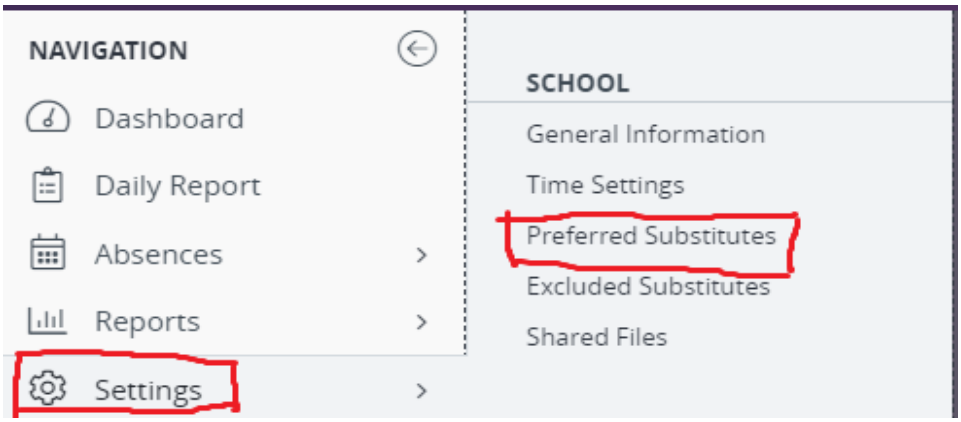


Once you have uploaded the file you will see it in the file list. Here you can give it a description and activate the To and From dates. The *To* and *From* dates will control when the files will be visible to the substitute that takes your absence.

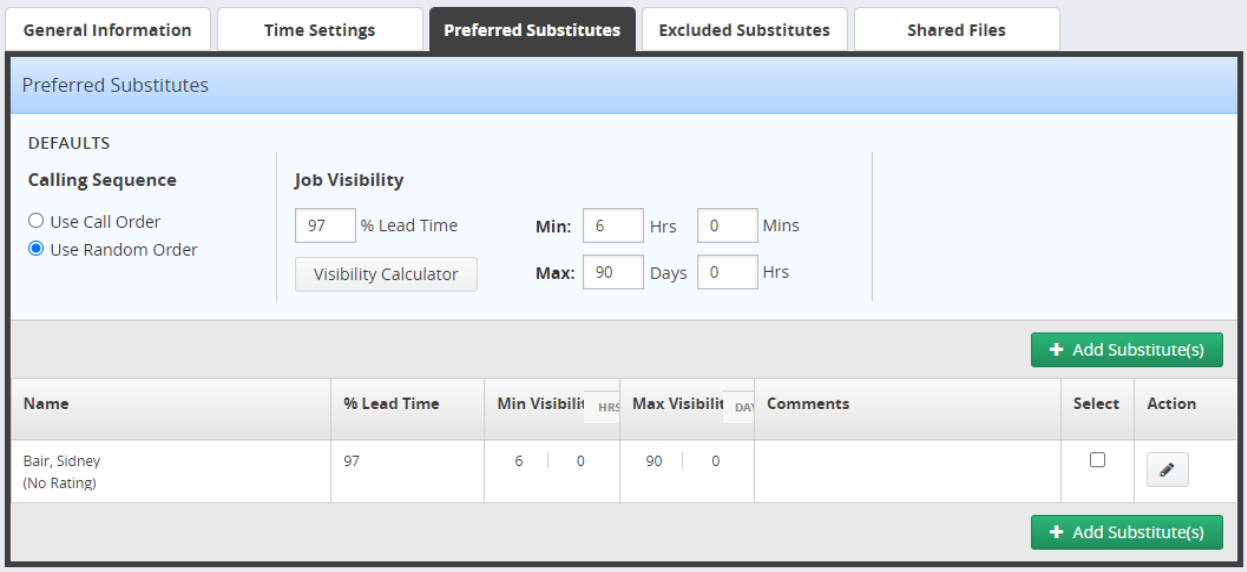
You can add additional documents from the same screen. Once all the information has been entered, click the *Save Changes* button.

Preferred Substitutes

As a Campus User, you will have the ability to set a preferred list of substitutes for your school. This will allow you to give certain substitutes an advantage when looking for jobs at your location. To set up the preference list select Settings and then *Preferred Substitutes* under the navigation section on the left side of your dashboard.



On the following screen, you have a couple of settings to consider.



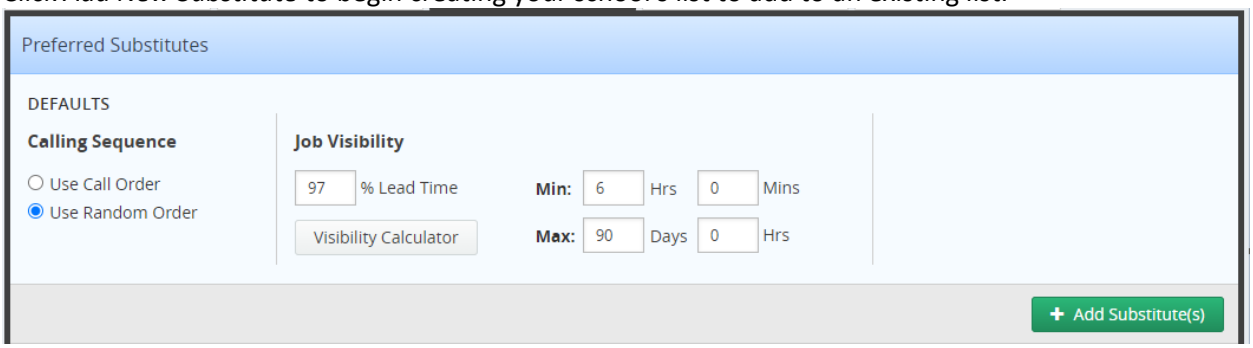
Calling Sequence - Here you can determine if AESOP will call substitutes on the preference list in a specific call order or random order. In almost all cases, you will leave this set to *Use Random Order* to give the substitutes an equal opportunity to accept the jobs.

Job Visibility - When in 'percent visibility' mode, the user can define a percentage of the lead time that the job will be visible to the substitute.

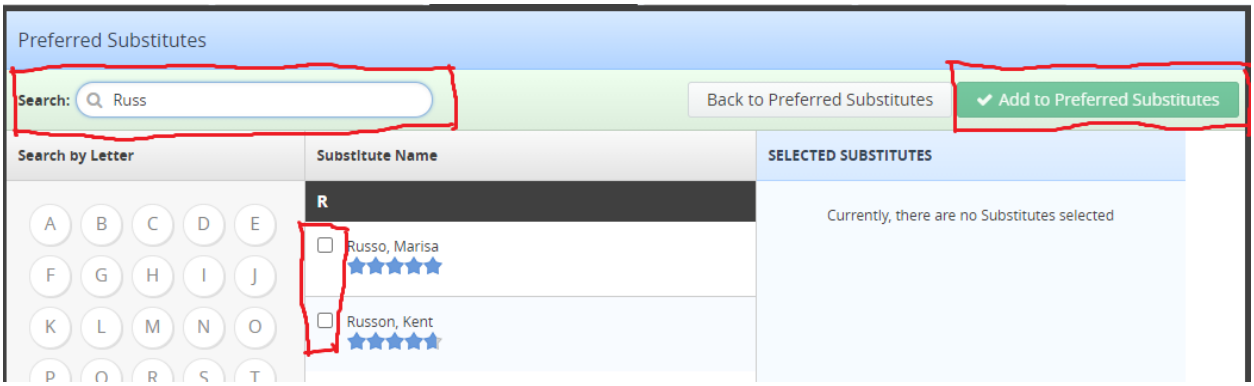
Please note: both of these settings have been predetermined by the school division and should be left as they are unless otherwise approved.

Adding a Substitute to the Preferred List

Click *Add New Substitute* to begin creating your school's list to add to an existing list.

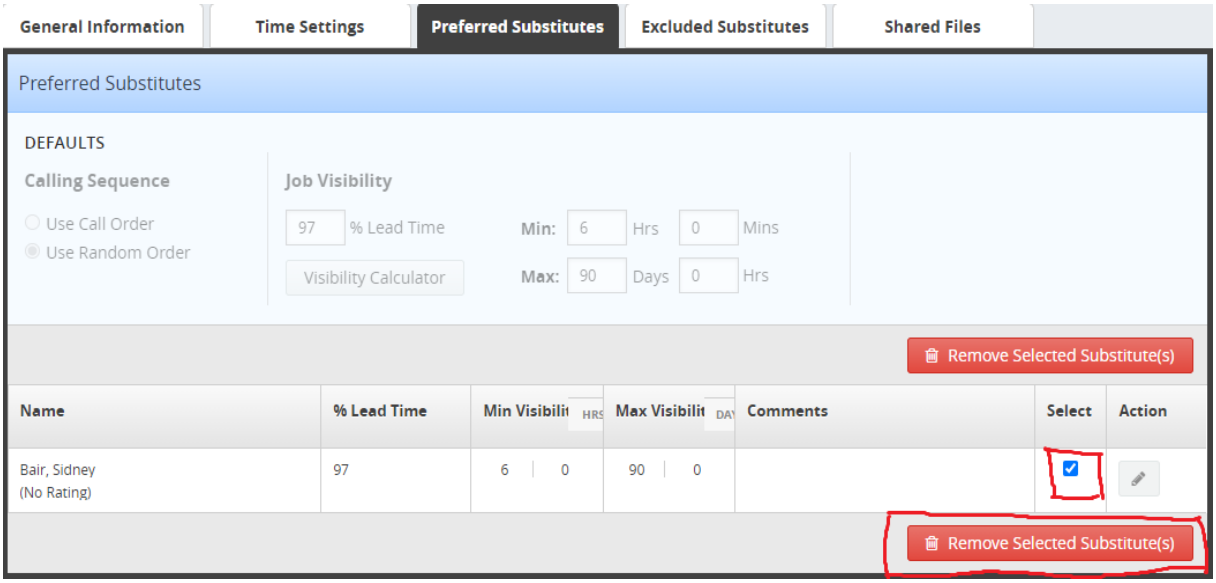


Begin by searching for the substitute in the search bar. Once the substitute appears in the middle of the screen, click the box next to their name and then click the *Add to Preferred Substitutes* Button.



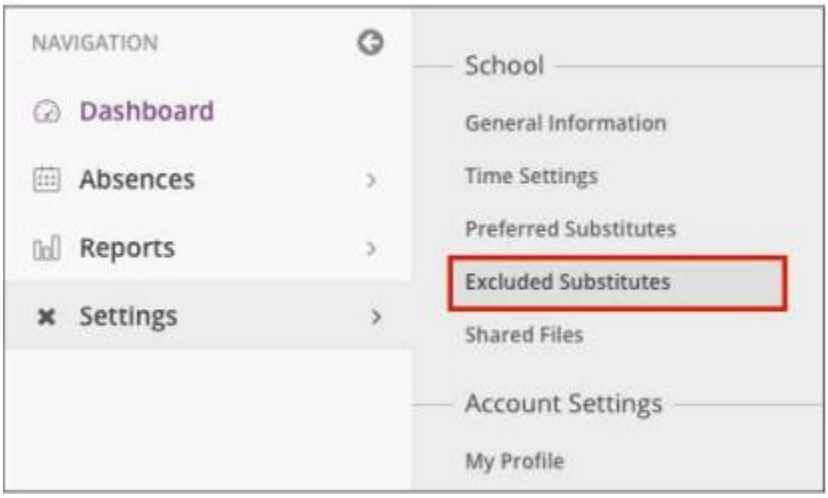
Continue this process until all the substitutes that you would like to be added are included in your school's list.

To remove a substitute from your preferred list, locate their name, click the box next to their name and then click *Remove Selected Substitute*.



Excluded Substitutes

You can exclude substitutes from viewing or accepting jobs at your school. When excluding a substitute, make sure an exclusion is warranted, because it prevents the substitute from viewing any available assignments at your school. Adding Excluded Substitutes Using the side navigation bar, hover over Settings and then click Excluded Substitutes.

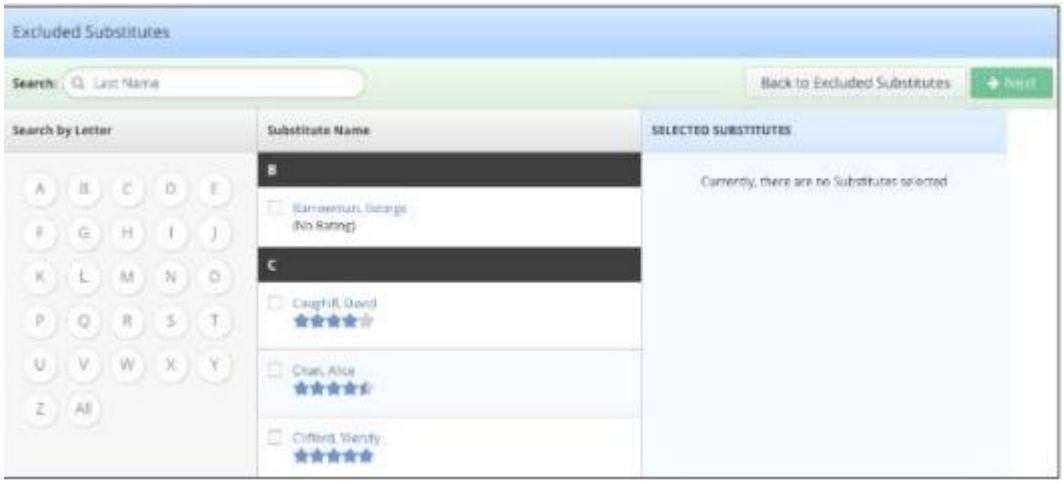


Once on the "Excluded Substitute" page, click **Add Substitute(s)** to add a substitute to the "Excluded" list.

After clicking "Add Substitute(s)", you may view a list of substitutes - in alphabetical order - by last name. You can search for a specific substitute by using the search box at the top of the page, or you can filter the results by selecting the first letter of the substitute's last name in the left column.

If you do not see the name of the substitute that you want to exclude, it may be because they are on the "Preferred Substitute" list for your location. To exclude these substitutes, you would need to remove them from the "Preferred Substitute" list for your school before excluding them.

Click the check box corresponding to one or more substitutes to select them. You can select as many substitutes as you want from the list. As you select them, their name appears in the "Selected Substitutes" column.



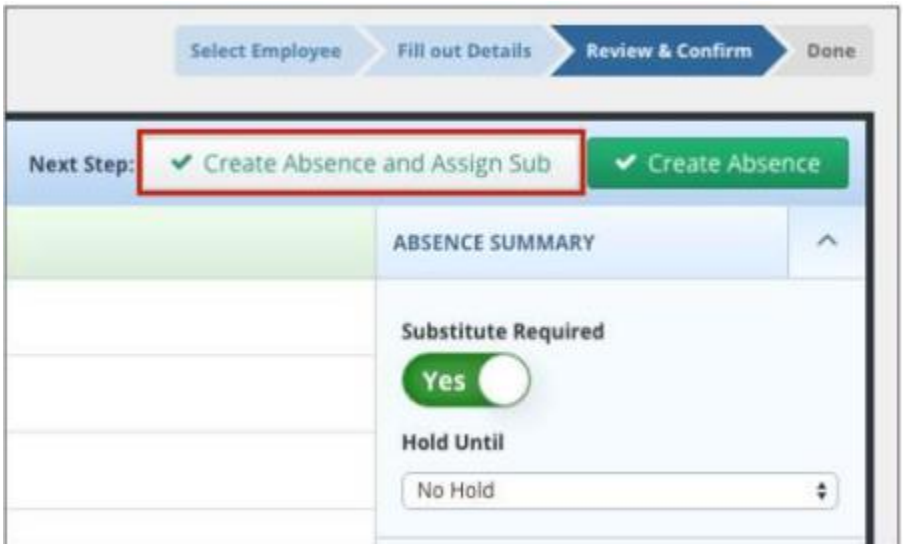
Once you have selected the substitute(s) you want to exclude, click the Next button. Once you make an entry, click Add to Excluded Substitutes List.

This adds the substitute(s) you selected to the Excluded Subs List, and they will not see job offers for absences you create.

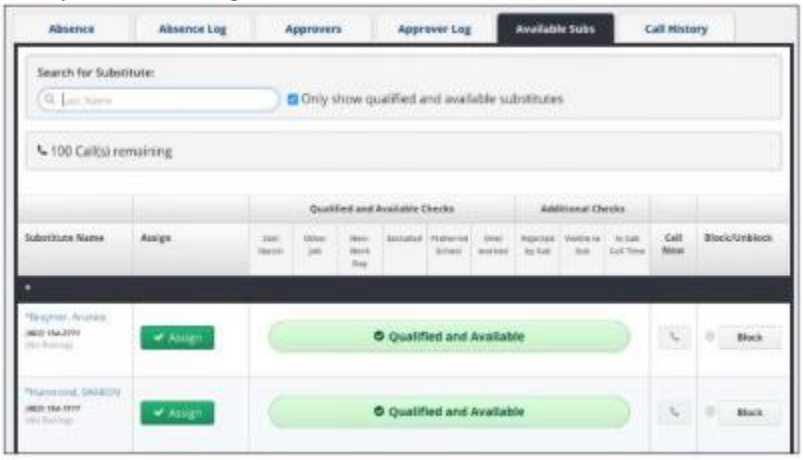
It is important to note that the excluded substitutes are not automatically removed from any future absences they may be assigned to at other schools. They would need to be removed manually, if necessary.

Assigning a Sub while creating an absence

If you know which substitute you want to assign, you can assign them during the absence creation process. Start by creating an absence. In the "Review & Confirm" step of the absence creation process, you will see a button that says Create Absence and Assign Sub. Click this button to save the absence and manually assign a substitute.

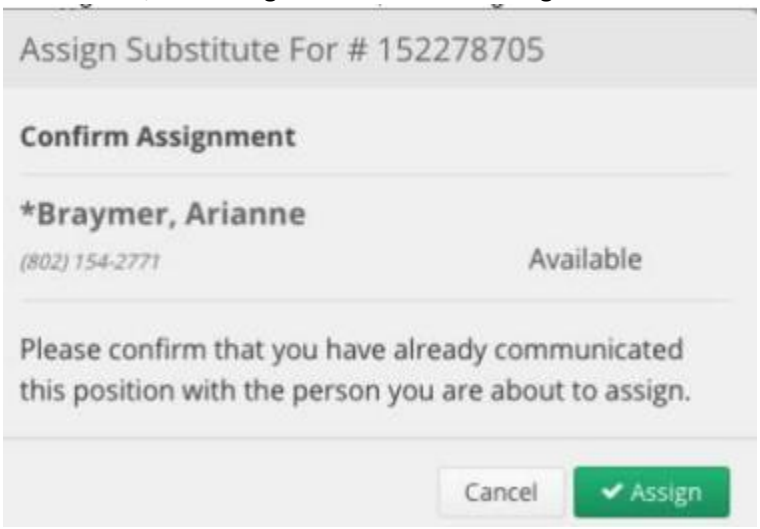


This will bring up a window where you can search for the substitute you want to assign. Type the last name of the substitute you are looking for or browse the list.



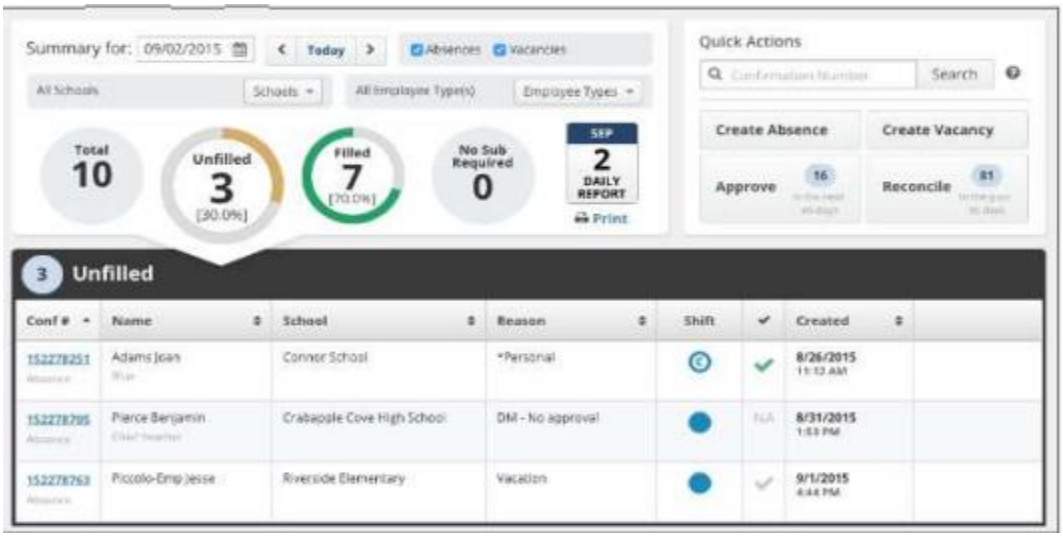
To assign a sub, click the green Assign button next to the substitute's name

A pop-up window will appear, asking you to confirm the assignment.
It is important that you communicate with the substitute and confirm with them that they are willing to fill the job before you assign it to them.
To assign the sub to the absence, click the green Confirm and Assign button

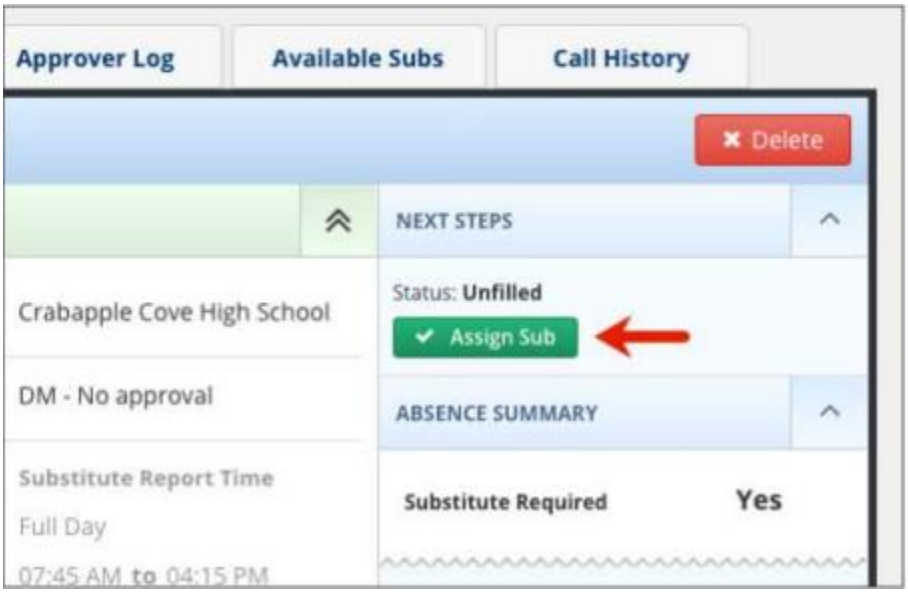


Assigning a sub to an existing absence

To assign a substitute to an already created absence, you must first find the absence you wish to assign, and you can do this via the dashboard.



Once you are on the "Absence Details" page, click the green Assign Sub button on the right side of the page.



This will bring up a window where you can search for the substitute you want to assign. Type the last name of the substitute you are looking for or browse the list.

To assign a sub, click the green Assign button next to the substitute's name.

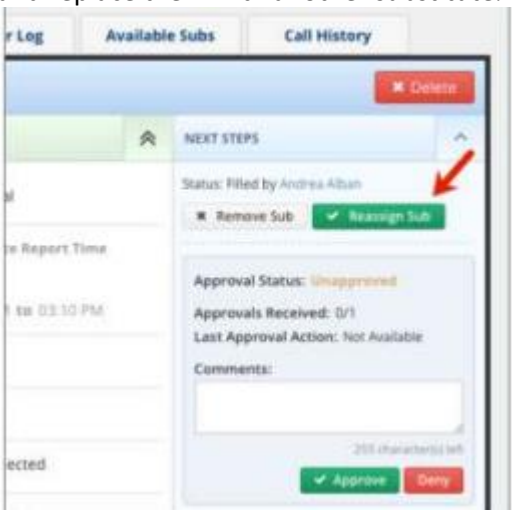
A pop-up window will appear, asking you to confirm the assignment.

It is important that you communicate with the substitute and confirm with them that they are willing to fill the job before you assign it to them. To assign the sub to the absence, click the green Confirm and Assign button.

Switching an assigned sub

If you need to switch out a currently assigned substitute with a different substitute, you can easily do so! First, find the absence. You can do this by using your absence management dashboard.

Once you are on the "Absence Details" page, click the green Reassign Sub button. This will allow you to remove the current substitute and replace them with another substitute.



This will bring up a window where you can search for the substitute you want to assign. Type the last name of the substitute you are looking for or browse the list.

To assign a sub, click the green Assign button next to the substitute's name

A pop-up window will appear, asking you to confirm the assignment.

It is important that you communicate with the substitute and confirm with them that they are willing to fill the job before you assign it to them.

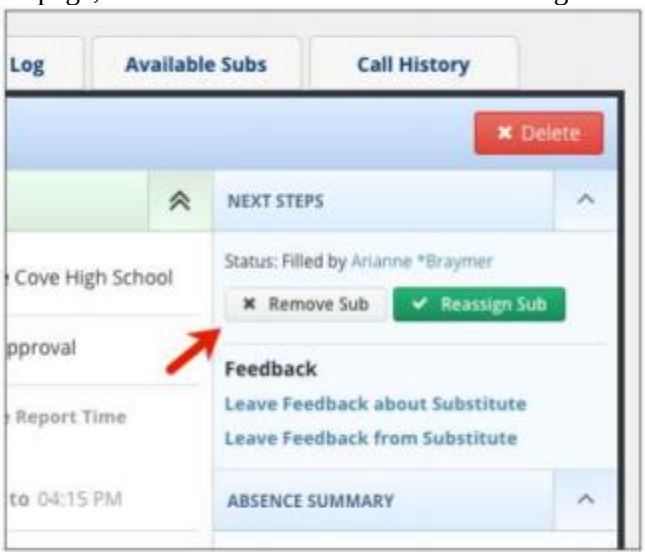
To assign the sub to the absence, click the green Confirm and Assign button.

Removing a sub from an absence

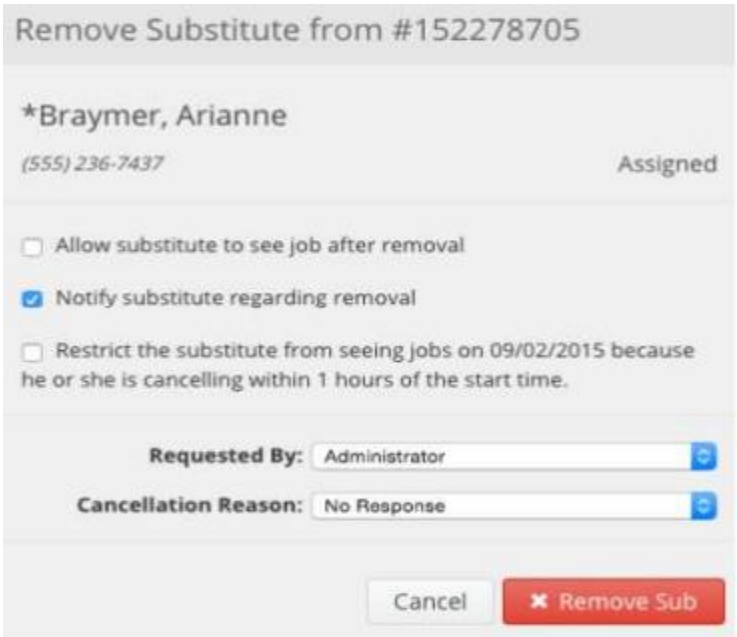
If plans change for an assigned substitute, you can easily remove that substitute from the absence.

First find the absence you want to assign the substitute to. You can do this with your absence management dashboard.

From the "Absence Details" page, click the Remove Sub button on the right side of the screen.



A pop-up window will appear where you can record who requested the removal. There are a couple other options you have here as well.



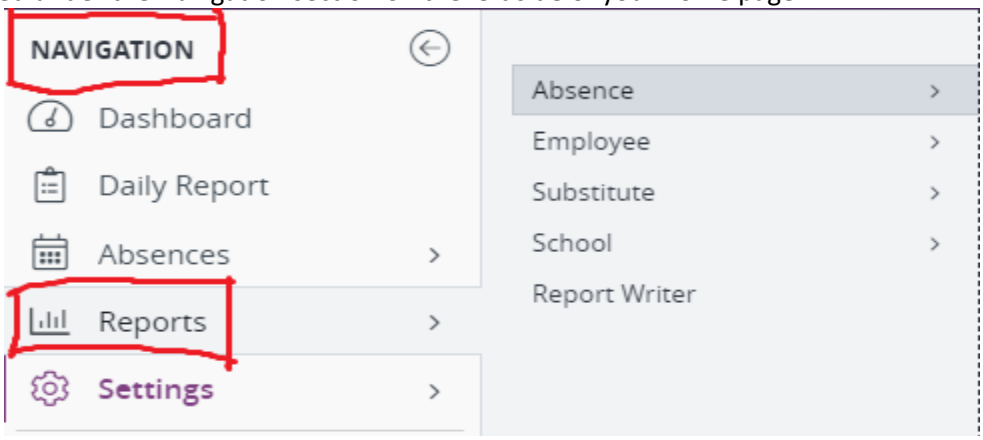
Allow substitute to see job after removal- Leave this box unchecked if you do not want this job to show up to the substitute as an available job after they have been removed.
Notify substitute regarding removal - If you want the absence management system to send the substitute a notification that they have been removed, leave this box checked.
Requested By - Choose who requested that the substitute be removed or if the substitute was a no-show. Absence management will record this information.
Restrict the substitute from seeing jobs on [date] because he or she is canceling within 1 hour of the start time - Checking this box will prevent the substitute from seeing jobs on the same day of the cancellation since they are canceling within an hour of the absence's start time.

Once you have made your selections, click the red **Remove Sub** button.

If the job is still in the future, absence management will begin to attempt to fill the job again with qualified and available substitutes.

Reports

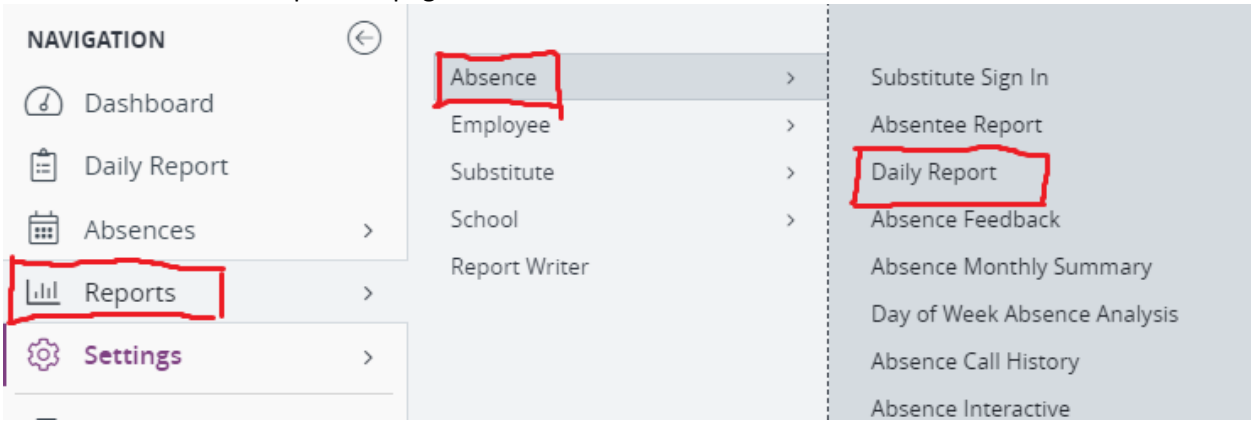
There are several reports that you will have access to from your AESOP home page. You can find these reports listed under the Navigation section on the left side of your home page.



We will begin to look at some of the more commonly used reports.

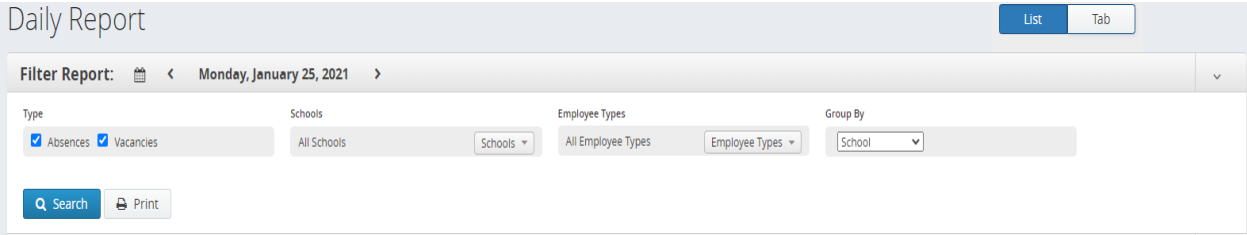
Daily Report

This is the most widely used report within AESOP. The Daily Report lists all the absence information for a specific day's absences. The report lists filled, unfilled and sub not needed absences. It has several filters to choose from at the top of the page.



From the Navigation section, click *Reports>Absence>Daily Report*

Please note: this report has been set up to be automatically emailed each morning. If you would like to run it separately or at a different time, these steps will explain the process.



Date: you can enter a specific date in this field. Hit Search to update the report

Today: use the left or right arrows to automatically change the view of the absence report below

Absences /Vacancies: you can select or deselect these options depending on the report you are looking to view. Hit Search to update the report

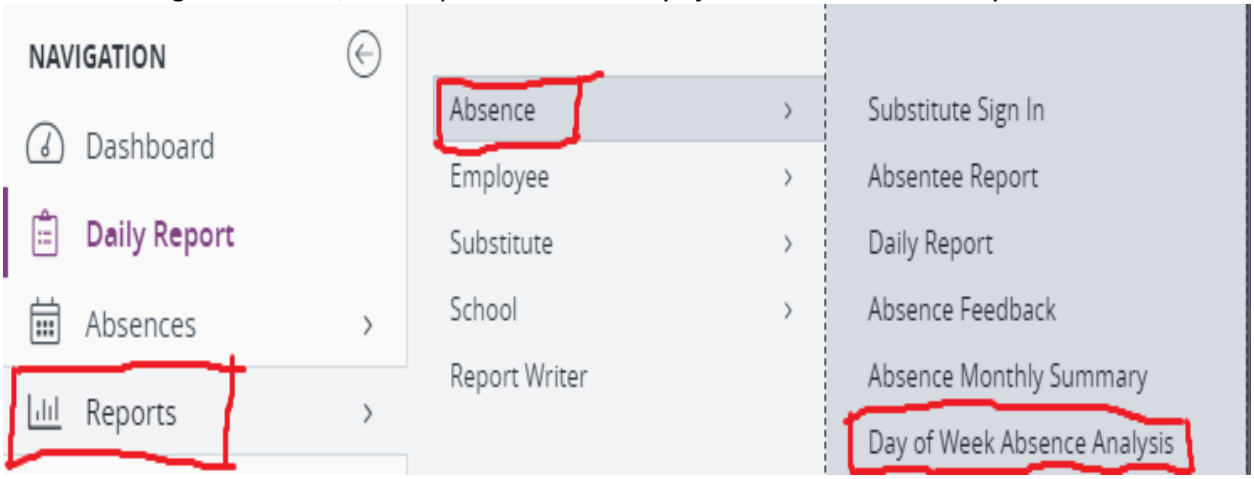
View: you can view the report on your screen in a list that will include all your search data or in a view that will put the data in tabs

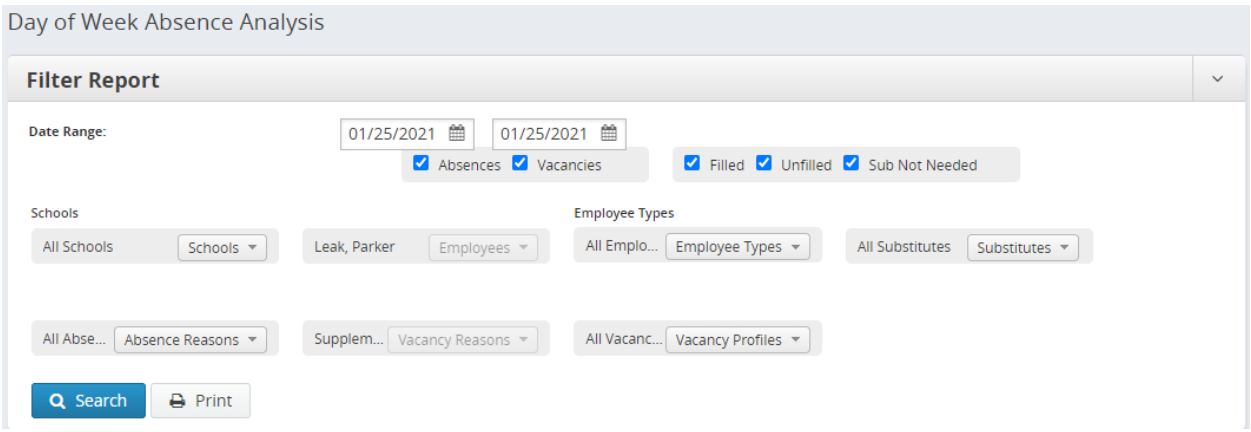
Day of Week Absence Analysis

This report allows you to specify not only the date range you are looking for, but you can also select many other categories such as the type of employee, absence reason or choose a specific employee.

This report breaks absences down by day, absence reason, and employee. The maximum date range is 92 days.

From the Navigation section, click *Reports>Absence>Day of the Week Absence Analysis*





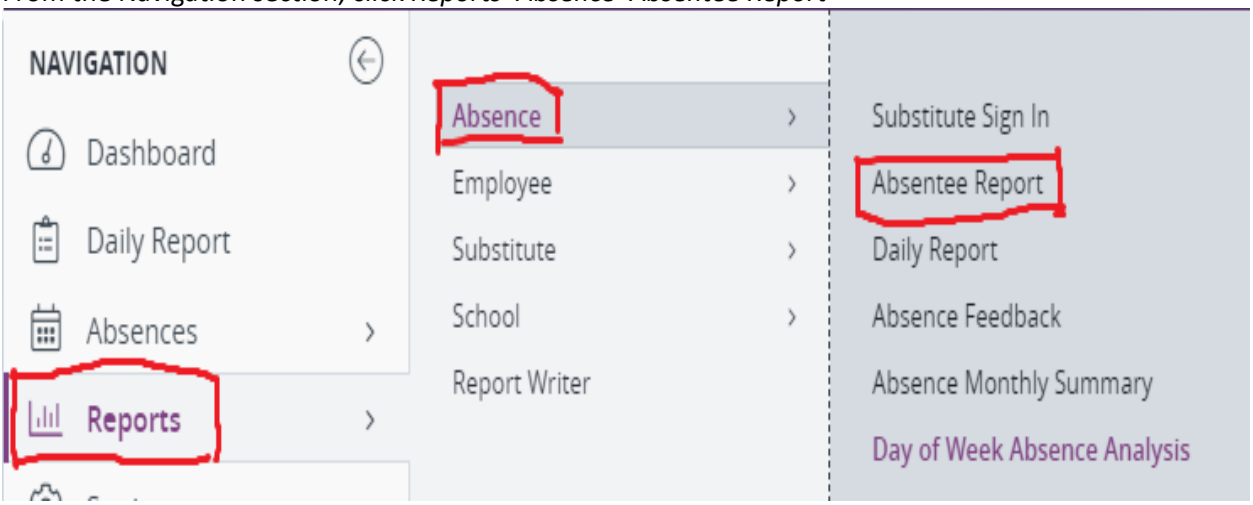
Once you have selected all the criteria you are looking for, click Search and the report can be viewed on your screen. You will also have the option to print the report by clicking the Print button.

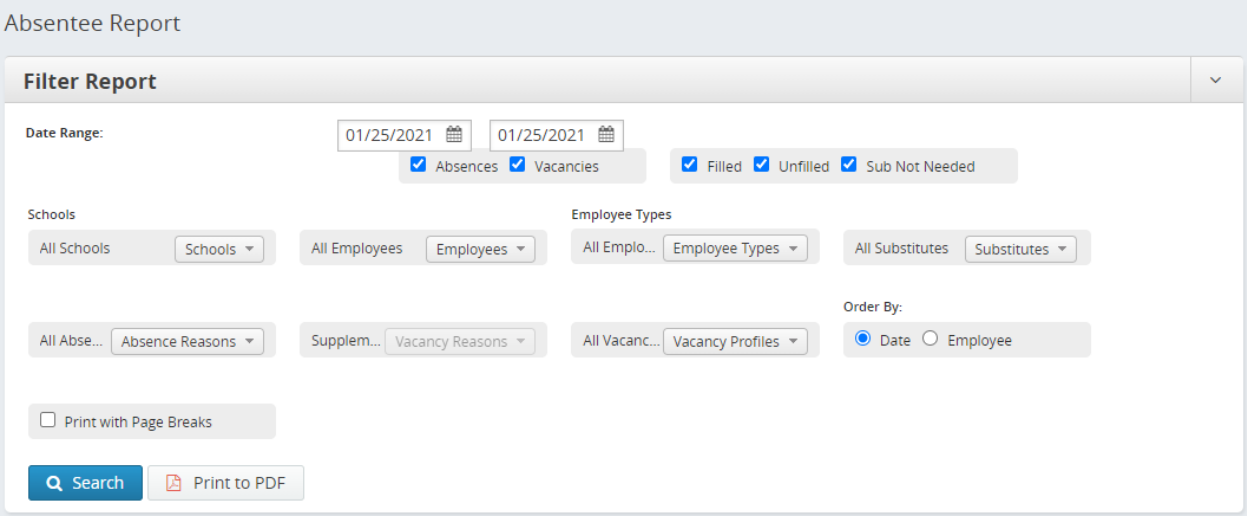
Absentee Report

This report is the same as the daily report, but the difference is that you can enter a date range instead of only searching for one specific date.

If you are running this report for your school, the maximum number of days you can view is 92.

If you are running this report for a specific person, the maximum number of days you can view is 365.
From the Navigation section, click *Reports>Absence>Absentee Report*





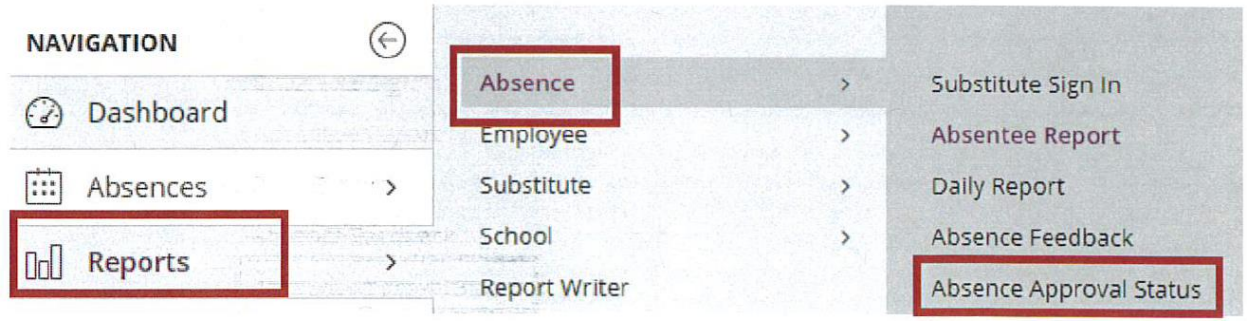
This report allows you to specify not only the date range you are looking for, but you can also select several other categories such as the type of employee, absence reason or choose a specific employee.

Once you have selected all the criteria you are looking for, click Search and the report can be viewed on your screen. You will also have the option to print the report by clicking the *Print to PDF* button.

Absence Approval Status

Use this report to view the approval status of all absences within a date range. The report can be filtered by employee name as well as absence reason.

From the Navigation section, click *Reports>Absence>Absence Approval Status*

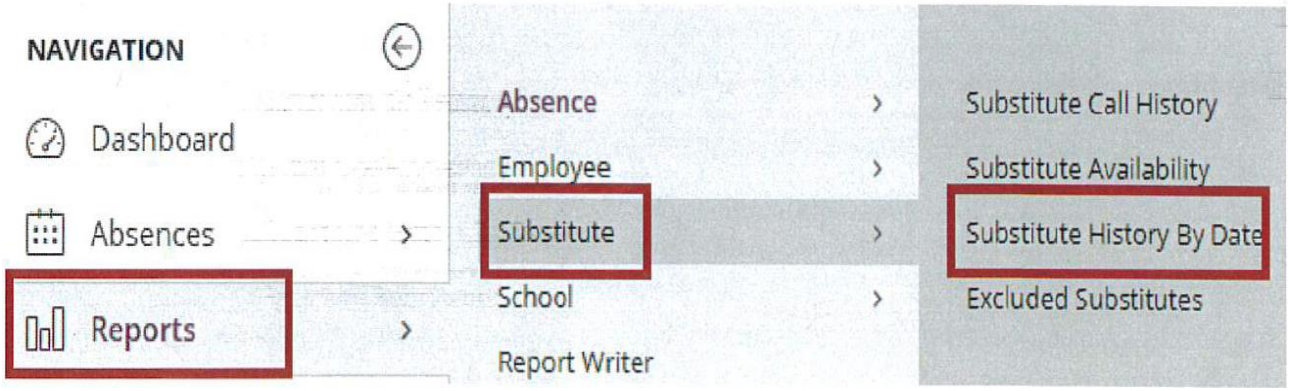


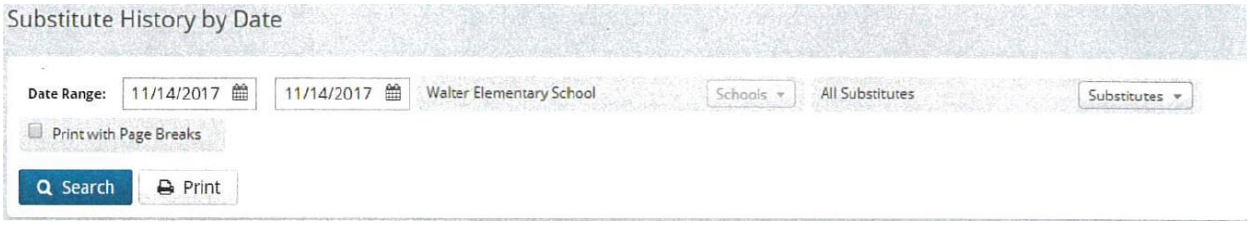
This report allows you to specify not only the date range you are looking for, but you can also select several other categories such as the type of employee, absence reason, or choose a specific employee.

Once you have selected all the criteria you are looking for, click Search and the report can be viewed on your screen. You will also have the option to print the report by clicking the *Print* button.

Substitute History Date

This report will show you the absence history of any substitute who has worked in your building. From the Navigation section, click *Reports>Substitute>Substitute History By Date*

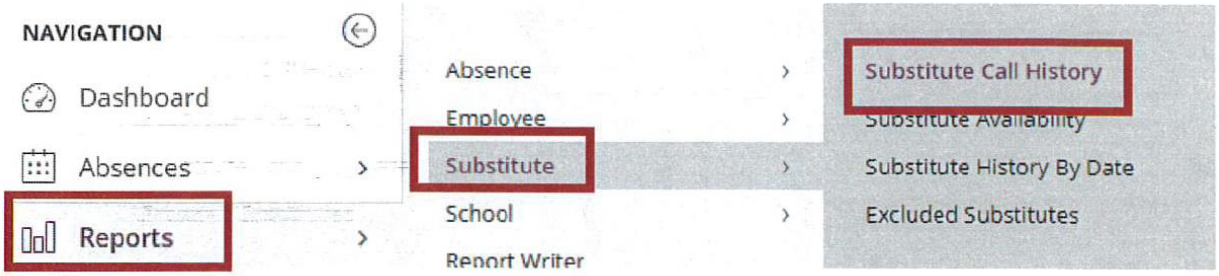




You can select all substitutes within a date range or select a specific substitute that you would like to view.
Once you have selected all the criteria you are looking for, click *Search* and the report can be viewed on your screen. You will also have the option to print the report by clicking the *Print* button.

Call History Report

View all outbound phone calls from AESOP to substitutes, as well as all inbound calls to AESOP from substitutes. This report also displays the details of those phone calls.
From the Navigation section, click *Reports>Substitute>Substitute Call History*

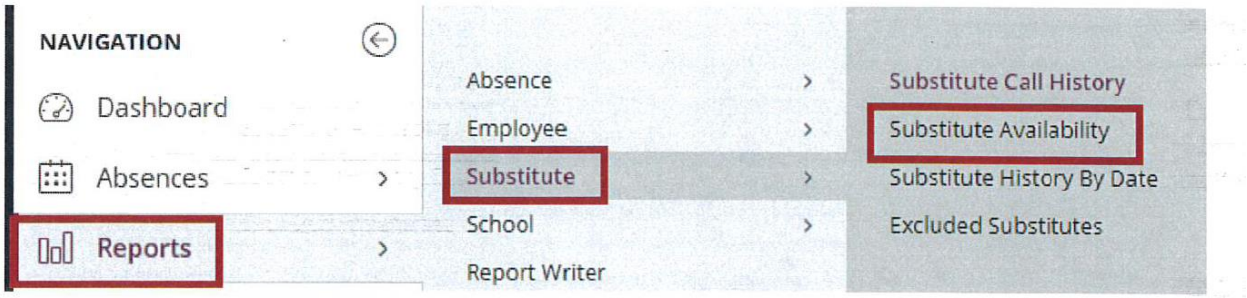


You can select all substitutes within a date range or select a specific substitute that you would like to view.

Once you have selected all the criteria you are looking for, click *Search* and the report can be viewed on your screen. You will also have the option to print the report by clicking the *Print* button.

Substitute Availability Report

You can review the availability of all substitutes for a specific date. This report also allows you to view all the substitute skills and if they prefer to work at your specific school location. From the Navigation section, click *Reports>Substitute>Substitute Availability*

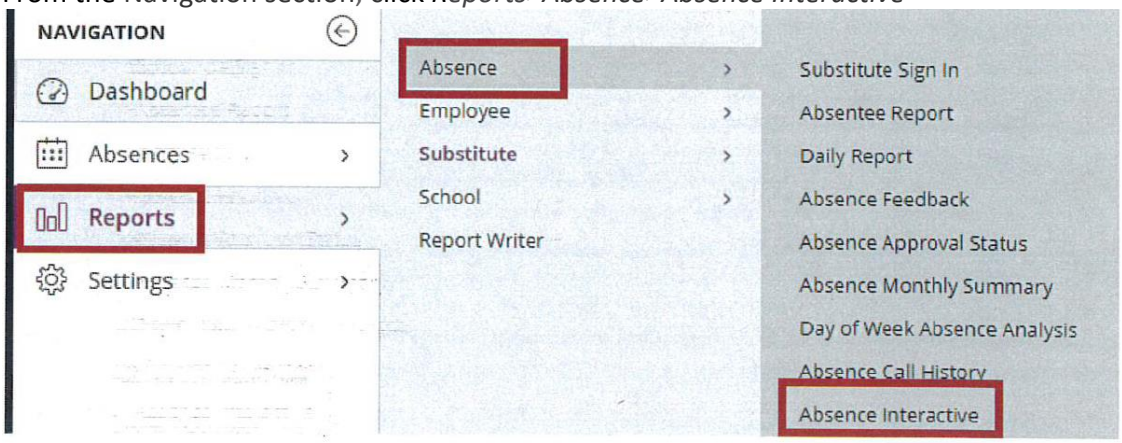


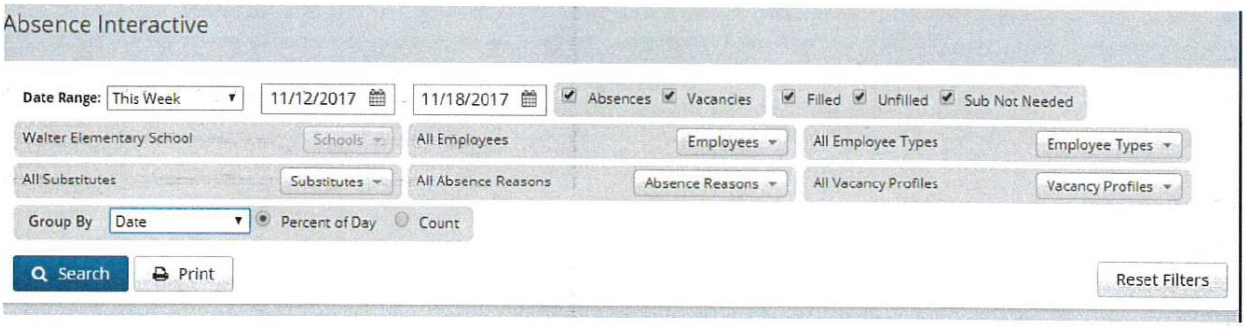
Enter the specific date you are looking for and then you can search for all substitutes or a specific substitute. If you want to review the skills they have (this determines if they are eligible to substitute for a specific employee) be sure to check the box next to *Show Skill* prior to running. The skills you would search for are CUSTODIAL.

Once you have selected all the criteria you are looking for, click *Search* and the report can be viewed on your screen. You will also have the option to p1int the report by clicking the *Print* button.

Absence Interactive Report

This report will allow you to pull information and statistics from AESOP for a large date range. This report also offers a variety of ways that the data can be grouped and gives you the ability to download the detailed information into an Excel spreadsheet.
From the Navigation section, click *Reports>Absence>Absence Interactive*

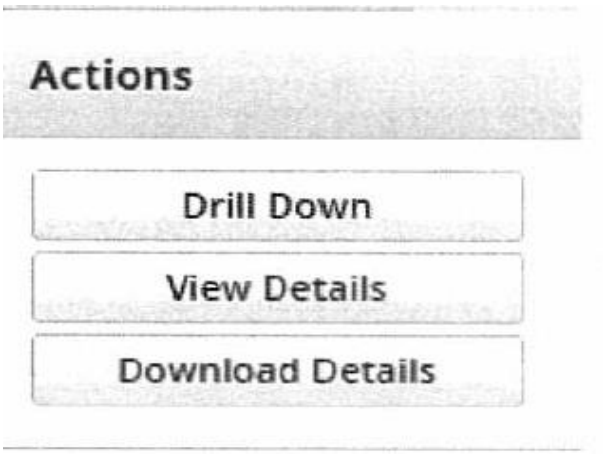




You can select all employees within a date range, select a specific employee, or select an employee type such as custodian. You can also select the absence reason and then choose how you want the data to be grouped.

Once you have selected all the criteria you are looking for, click *Search* and the report can be viewed on your screen. You will also have the option to print the report by clicking the *Print* button.

Also, on the report, you will be able to click from other options to be able to see more data or extract the data. You will see the following options on the right side of your report.



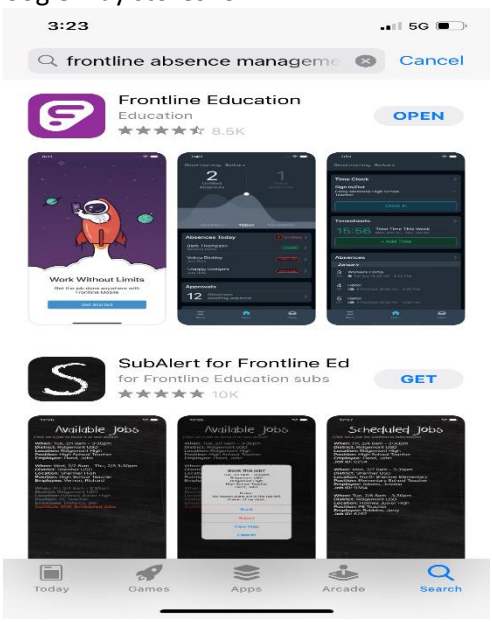
All District supervisors may receive Event Notification emails for one of the six following reasons:

- When an absence is created, cancelled, deleted, unfilled, filled, or reconciled
- When the absence reason, date, times, school, or type is modified
- When the absence notes to substitute, to administrator, or to administrator only are modified
- When a substitute is removed from the job
- When substitute report times are modified
- When the accounting, budget, or pay code is modified

~App~

Downloading the app

The easiest way to access AESOP is to download the Frontline Mobile App to your device. The app is available from either Apple or Google Play stores for FREE.



Logging in

Move the app to your home screen and click on it. Using your username and password log into the application.

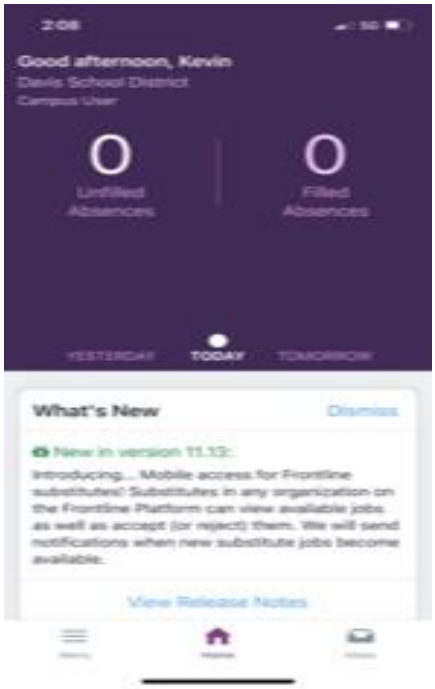
Forgot Your Username or Password?

If you have forgotten your Username and/or Password you can click on either of the links, Forgot my username or Forgot my Password. This will take you to a page where you can enter your email address and have a reminder sent to you.

Home Page

From your Homepage, click on Schedule an Absence to enter an absence. Features on your home page include pending approvals, unfilled absences, and a collective count of filled absences for the current and/or upcoming day.

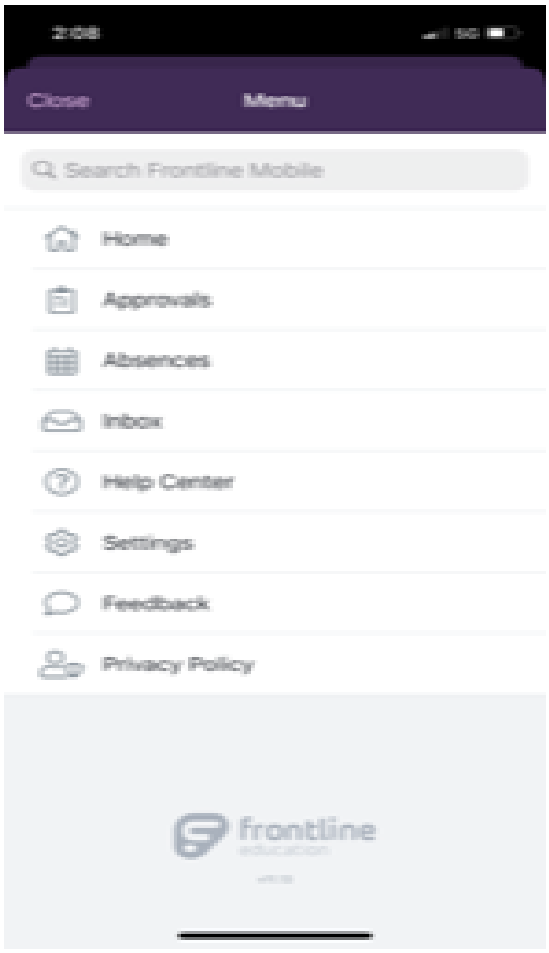
You can select a particular timeframe (Yesterday, Today, and/or Tomorrow) to review your location's absence requirements and reference the purple graph to review absence details. You can also select Approvals (to review absences pending approval), Absences Today (to identify which of your district absences are filled, unfilled, and do not require substitutes), or People (to email or call an individual from your contacts list).



Menu/Side Navigation

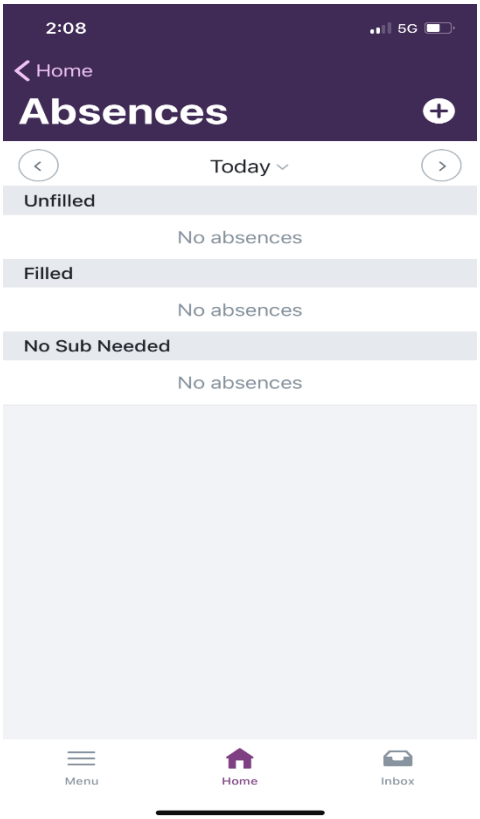
The “Menu” option opens a side navigation bar where you can access current tools and settings.

- Click People to view your contact list and reference email and/or personal phone options.
- Select Absences to identify which of your absences are filled, unfilled, and/or do not require a substitute and select an individual from the list to review his/her details.
- Select Approvals to review absences and approve or deny a request.
- Choose Calendar to view upcoming scheduled absences and any Professional Development events you have registered for through Professional Learning Management. (Note, the user can also use the mobile app to electronically check in prior to attending the event.)



Absences

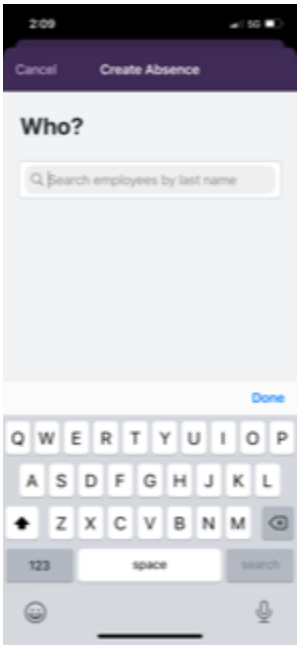
The Absences page provides an overview of available Paid Time Off (if leave balances are enabled) or absences this past year (if available). The page also includes upcoming, past, or denied absences.



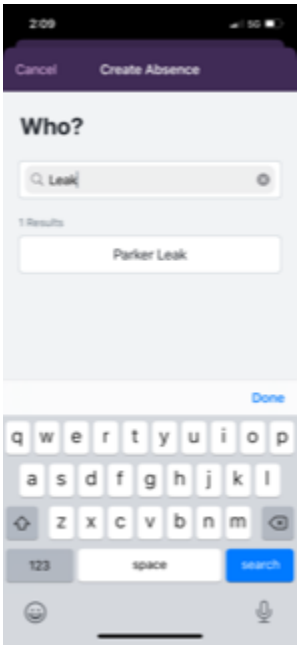
Create an absence

Choose your absence time frame, indicate whether a substitute is required, and include notes for the Admin or sub.

When you click on absence you will be taken to a page where you can search for the employee you want to create an absence for.

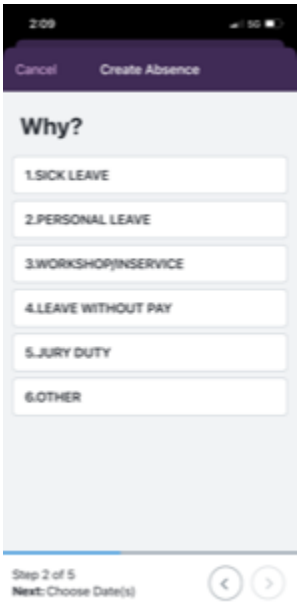


Simply begin typing the last name in the search bar. Once the employee's name appears, click on their name.



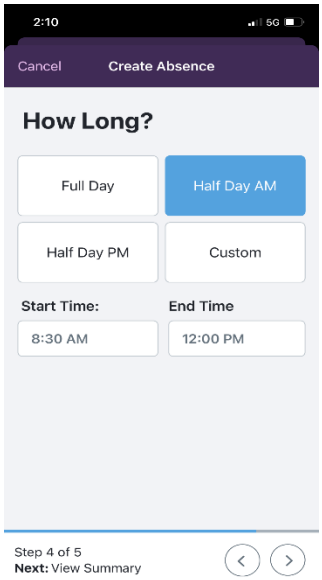
You will need to complete the following:

- Reason for the absence

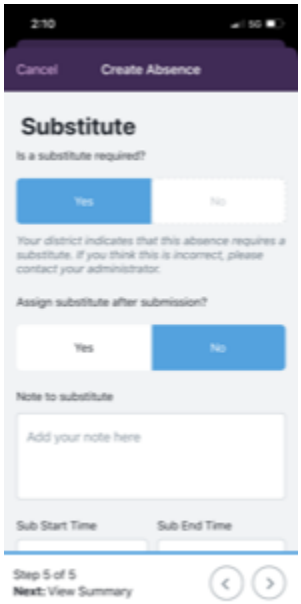


- The date of the absence

- Time

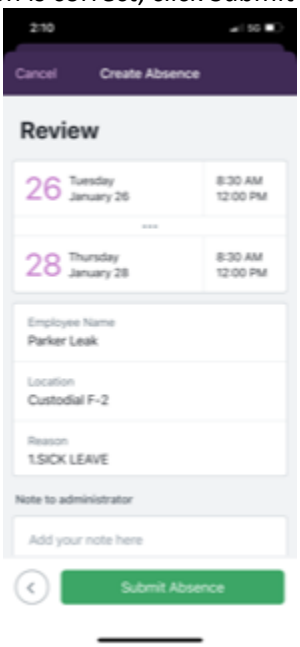


- Substitute Required and any notes



Once those sections are complete, click on the Review and Confirm button.

You will then be shown the summary of the absence, if any details are left off or incorrect, go back to the previous screen. If all the information is correct, click Submit Absence.



Frequently Asked Questions

Q. Is there an option to view a substitute's phone #? For example, in the case that a sub has accepted a job and has not arrived by the time the assignment is set to start.

A: Yes, by following the below steps:

1: Click on the confirmation # of the sub who has not arrived.

2: When screen opens to the absence details, click on the tab at the top named Available Subs.

3: You will then see a search bar where you will enter the sub's last name.

Q. Am I able to "Request" a sub?

A. You are not able to request a sub; however, you can build a preferred sub list and it gives those subs the first opportunity to fill the absence.

Q. What if I forget my username?

A: Contact Raini in the office and she can send you an email to reset your information.

Q. How far in advance can I create an absence?

A: Absences can be entered up to one year in advance.

Q. Why didn't my preferred sub get the job?

A: Preference lists are one of a variety of factors that come into play when subs are offered assignments. A preferred sub list provides the best chance at selecting your favorite sub, but the list does not serve as a guarantee. Even if you have already made arrangements with a qualified sub it is recommended that you assign the sub to a job.