

- Select the *Create Report* button for a report
 - A report setup screen allows the choice of data to be included on the report
 - Select the *View Report* button
- Select the *Search* button for the search list
 - Modify Priority List
 - Select substitute to modify by selecting the substitute's name
 - Modify substitute list and/or level
 - Select *Save* button
 - Delete Substitute from Priority List
 - Place a checkmark in the Delete box
 - Select the *Delete* button

PROFILE INQUIRY/REPORTS

Choose the *Profile Inquiry/Reports* link to view and/or print a list of Employees and/or Substitutes for your location.

Profile Inquiry Tab

- Enter name, access ID, external ID or call back number (substitute only)
- Select the *Search* button
- Select a profile by clicking the *Select* link by the name
- View basic profile information on the profile tab

- Select employee or substitute tab and links within the tabs for detailed information

Employee Inquiry Tab

- Enter search criteria or select the *Search* button to return all employees at your location(s)
- Select a profile by clicking the *Name* link
- View basic information on the profile tab
- Select the employee tab and links within the tab for detailed information

Employee Report from the Employee Inquiry Tab

- Enter search criteria or leave blank for all employees at your location(s)
- Select the *Create Report* button
 - Select a report type from the report setup
 - Employee Detail Report
 - Employee Labels
 - Employee List
- Select the *View Report* button

Substitute Inquiry

- Enter search criteria or select the *Search* button to return all substitutes at your location(s)
- Select a profile by selecting the *Name* link
- View basic information on the profile tab
- Select the substitute tab and links within the tab for detailed information

Substitute Report from the Substitute Inquiry Tab

- Enter search criteria or leave blank for all substitutes at your location(s)
- Select the *Create Report* button
 - Select a report type from the report setup
 - Substitute Detail Report
 - Substitute List
 - Substitute Labels
 - Substitute Statistics
- Select the *View Report* button

PROFILE NEW

Choose the *Profile New* link

Profile New lets you create a new profile for an administrator, employee, and substitute.

- Enter basic profile information. Required fields have an asterisk (*).
- Select all the types that apply to this profile
 - Is Administrator
 - Check the *Type* box to enable administrator access
 - Check the boxes that apply to this profile
 - Is Employee
 - Check the *Type* box to enable employee access
 - Check the boxes that apply to this profile
 - Select a calendar to be followed by the employee
 - Is Substitute
 - Check the *Type* box to enable substitute access
 - Check the boxes that apply to this profile
 - Enter a callback number for the system to use to contact the substitute
- Select the *Save* button
- Additional tabs are displayed based on the type of profile being added. Complete the additional information to complete the profile

SIGN OUT AND WEB BROWSER INFORMATION

At any time during the session, the *Sign Out* link can be selected to end the session and disconnect from SmartFindExpress. Selecting the browser's back button or going to another site on the Internet does not disconnect the session from SmartFindExpress.

To ensure security and privacy of information, use the *Sign Out* link to disconnect from SmartFindExpress, and close the browser when you finish with your session.

Important Note: Do NOT use the browser's BACK button to navigate to screens. Navigation buttons are on the bottom of SmartFindExpress screens, such as the *Return to List* and *Continue* buttons.

ST. JOHNS COUNTY SCHOOL DISTRICT Administrator Browser Quick Reference Card

System Phone Number **823-0090**

Help Desk Phone Number **547-7636**

Write your PIN number here _____

Web Browser URL **www.stjohns.k12.fl.us**

BROWSER ACCESS INSTRUCTIONS

SIGN IN

Open your web browser and access the SmartFindExpress sign in page. Review the messages above the Sign In. Enter your Access ID and PIN. Review additional announcements on your home page, if any.

Important Note: Items in ***bold*** type are required to initiate chosen action.

ANNOUNCEMENTS

Choose the *Announcements* Link

- Create a new announcement
 - Select *New* button
 - Select the location for the announcement (default is your location)
 - Type in the text of the announcement
 - Select the *Save* button

CREATE AN ABSENCE

Choose the *Create an Absence* link

- **Enter employee's access ID or use the *Name Lookup* button.** If *Name Lookup* is selected
 - Enter the employee's first or last name (enter full or partial name)
 - Select the *Search* button
 - Select the Employee from the list by choosing the *Name* link
- Select a Location (default is employee's primary location)
- Select Classification (default is employee's primary classification)
 - To select a different classification, click the drop-down menu and choose the classification
- **Select Reason for this absence from the drop-down menu**
- **Select Start and End Dates for your absence**
 - Enter the dates with forward slashes (MM/DD/YYYY) or use the calendar icon

- **Select Start and End Times for your absence. Default times are listed**
 - To change defaults, enter the time in HH:MM am or pm format
 - Ensure that the correct time is entered. If the times for the substitute are different than the absence times, please enter the adjusted times
- Multiple Day (Recurring) Absence. Select the *Modify Schedule* button
 - The default work schedule is shown. Remove the checkmark(s) from the Work Days boxes that do not apply to this absence
 - Modify daily schedule and/or times for absence and substitute
 - Select the *Continue* button
- Request a particular substitute
 - Enter the substitute's access ID number or use the *Name Lookup* button to find the substitute by name
- Indicate if the requested substitute has accepted this job
 - Yes = substitute is prearranged and will not be called and offered the job
 - No = call will be placed and the substitute will be offered the job
- Enter special instructions for the substitute to view
- Enter comments for administrator viewing only
- **Select the Continue button**
- **Select the Create Absence button to receive a Job Number. Please record this Job Number**

CREATE AN ABSENCE

Choose the *Create an Absence* link

Quick Absence Entry for one (1) day Absence for today using default times

Items in Bold are **required** to complete an Absence and receive a Job Number.

- **Enter employee's access ID or use Name lookup**
- **Select Reason for Absence**
- Specify a Substitute
- Prearrange Substitute
- Enter instructions for Substitute and Administrator
- **Select the Continue button**
- Confirm the Absence information
- **Select the Create Absence button to receive a Job Number. Please record this Job Number**

CREATE A VACANCY

Choose the *Create Vacancy* link

- **Select Calendar for Vacancy**
- **Select Location for Vacancy**
- **Select Classification for Vacancy**

- **Follow steps in Create an Absence Entry, starting at "Select Reason"**
- **Select the Create Vacancy button to receive a Job Number. Please record this job number**

DAILY JOB COUNTS

Choose the *Daily Job Counts* link

The Daily Job Count allows you to search and view a count of jobs at your location for a month. Past, present and future job counts can be viewed.

- Select Month and Year (defaults to current month and year)
- Select Reason for absence or leave blank for all reasons
- Select Location (default will be your location)
- Select *Search* button

You may search other months by using the Previous Month or Next Month buttons

LOCATION BALANCES

Choose the *Location Balances* link

Location balances allows you to search and view remaining balances for substitute allocation units and in-house filling.

- Select a location
- Select either SAU or IFC
- Select a date range
- Select *Search* button

JOB INQUIRY/REPORTS

Choose *Job Inquiry/Reports* link

Job Inquiry allows you to search, view and print job reports for your location. Past, present and future jobs may be viewed or modified

Today's Job Inquiry

- Select the *Search* button or *Create Report* button for a list of all jobs for today

Job Inquiry

- **Enter a Job Number or Search criteria for a list of jobs**

Search Criteria

 - Job Types - All (both Absences and Vacancies), Absences and Vacancies
 - Job Status - All, Open & Filled, Open, Filled, Finished & Verified, Finished, Verified, Cancelled
 - Sub Status - All, No Sub Required, Filled, Not Filled.
 - Date Range - Defaults to Today. Enter dates or use the calendar icons to select dates
 - Select the *More Search Options* button to expand search criteria options to create a more defined search

- Select Sort Order
 - Budget Code, Classification Name, Employee Name, End Date, Job # (default), Location Name, Reason Name, Start Date, Job Status, Job Sub-Status, Substitute Name
 - Select "Then By" Sort order (same options as Sort Order)
- Select the *Search* button to view a list of jobs or select other options
 - *Create Report* creates a printed report of the selected job information. A report setup screens allows a choice for the printing of detailed or summary information
 - *Export* creates a data file of the job information
- If you pressed the *Search* button, select the *Job Number* link to view or modify details of the job
 - Modify job actions to change the job's status including stop callout, re-open, cancel, and verify
 - Modify job information - Details of the job (time, reason, substitute, etc.) can be modified prior to the job ending
 - Select the *Save* button

Other actions on the job detail screen

- *Filling Details* button – Detailed information regarding all calls and disqualifications for the job
- *Reset* button – Return the data to its original state before selecting the *Save* button
- *Return to List* button – Return to the list that was created by the search

PRIORITY LISTS

Choose the *Priority Lists* link to view, modify, and print priority lists of substitutes for your location. Substitutes are assigned a list number and level, which determines the order they will be called for jobs. The lowest order is called first.

New Priority List

- Select the *New* button
 - Enter substitute's access ID or use *Name Lookup* button
 - Select List Type from drop-down menu (Preferred, Auto Assignment, Do Not Use)
 - Select Classification from drop-down menu or enter the classification code
 - Select either a location or employee, but not both
 - Enter the sub list and level. (Default is 1)
 - Select the *Save* button

Priority Lists Inquiry

- Enter the search criteria or press the *Search* button for all priority lists
 - Select List Type from drop-down menu (Preferred, Auto Assignment, Do Not Use)
 - Select Classification from drop-down menu
 - Select Location
 - Enter employee's access ID or use *Name Lookup* button
 - Enter substitute's access ID or use *Name Lookup* button

- Select the sort order
 - Select sort by (default Substitute name) and "then by" sort order