Redlands Unified School District
Administrator Browser Quick Reference Card

System Phone Number	**(909) 307-5345**
Help Desk Phone Number	**(909) 748-6778 or (909) 748-6774**
Write your Access ID here	______________________
Write your PIN here	______________________
Web Browser URL	**https://redlands.echoolsolutions.com**

WEB BROWSER ACCESS INSTRUCTIONS

SIGN IN/PIN REMINDER

Open your browser and access the SmartFind *Express* 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. When the *PIN Reminder* link is selected, the system displays the PIN Reminder Request page. The user's Access ID and the security code being displayed must be entered on this page. **Note:** *You must be registered with the system to use this option.*

PROFILE/SELECT ROLE

Profile: View profile information, update email or change password.
Select Role: For multi-role administrators, click on the desired icon to access another profile. No need to log out of the system and back in again!

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.
  - 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
- **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 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

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LOCATION BALANCES

Choose the *Location Balances* link. Location balances allows you to search and view remaining balances for substitute allocation units.

- Select a location
- Select SAU
- 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 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

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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 or Do Not Use)
    - Select Classification from drop-down menu
    - 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 or 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
- 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.

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 the *Create Report* button
  Note: The Substitute List will give you a quick list with Substitute's Names, IDs and Phone Numbers.
- Select the *View Report* button

ABSENCE APPROVAL

Choose the *Absence Approval* link to search, approve/deny or modify absence approval requests or to create an Absence Approval report.

View Absence Approval Requests

- Enter search criteria or select the Search button to return all absence approval requests
    - Create Report creates a report of the selected absence approval information. Select report options from the report setup page

Approve/Deny Absence Approvals

- Click in the Select field and then click the Approve or Deny button. To view the history on the specific request, click the *Level* link to display the Absence Approval History page. A comment can be added to the approval request.

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 SmartFind *Express*. Selecting the browser's back button or going to another site on the Internet does not disconnect the session from SmartFind *Express*.

To ensure security and privacy of information, use the *Sign Out* link to disconnect from SmartFind *Express,* and close the web 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 SmartFind *Express screens, such as the Return to List and Continue buttons.*