

Administrator SFE 2.0 Web Reference

TO ACCESS SmartFind Express 2.0:

1. Type <http://charlotte-mecklenburg.eschoolsolutions.com> in the address bar on the web or Go to the CMS Homepage at www.cms.k12.nc.us
2. Click on “**Jobs**” at the top of the page.
3. Click on the “**SmartFind Express Teacher/Substitute system**” link on the left side of page.
4. Click on the “Welcome to SmartFind Express link.” Next to Welcome to SmartFind or on the SmartFind link under Related Links.
5. Login to **SmartFind Express 2.0: User ID = CMS/Lawson Employee ID.** and **PIN = number chosen when you registered on the SMARTFIND EXPRESS phone system.**
6. If you do not have a PIN call **980-819-4422** to register. You will enter your Access ID = CMS/Lawson Employee ID. 2x. Follow the prompts and create your PIN.
7. The system will open to a Home page, “**Welcome (your name)**” Screen. This page displays the User Name, and messages related to the school day.

WHEN YOU LOG IN:

1. Your Administrator Profile Homepage will open. To change to your Employee Profile Homepage to create your own absence click “**Employee**” at the top of the page under “Sign Out”. Click “**Help**” to view the help menu. Follow the instructions on the “SFE 2.0 Employee Web Reference”.

TO CREATE ABSENCES FOR AN EMPLOYEE:

1. Click the **ADMINISTRATOR** drop down, click **Create Absence.**
2. Absence can be entered up to 90 days in advance.
3. Search for the employee with their CMS/Lawson Employee ID or click name look up.
4. Select Employee
5. Location and Classification will automatically appear.
6. Click the drop box to choose the correct Reason. i.e.: (01 SL Personal ILL).
7. Is a Sub required? Yes/No. It will default to Yes if position requires a sub and NO if position does not require a sub.
8. Set the Appropriate Date and/or times. **½ day absences must equal less than 4.5 hrs.**
9. Specify the substitute with the **Substitute’s Employee ID.** Or lookup by name.
10. Has the substitute accepted this job? Yes/No. Click One. If yes, sub will not be called by the system. But will be assigned to the job at the same time as it is created and no one else can accept it. No will specify the sub and the system will call them first.
11. Special Instructions use as needed, Attach files as needed. i.e. (Lesson Plans)
12. Click the Submit button, Review information, Click Create Absence and receive the **Job #.**
13. If complete and correct, the following will appear: **The Job was created successfully.**
14. Click New Absence, Same Employee or Same Date Same Reason.

TO CREATE A VACANCY:

1. Click the **ADMINISTRATOR** drop down, click **Create Vacancy.**
2. Select Classification and reason code 09 Vacant Position, location will default.
3. Follow steps 8-13 above.

TO REVIEW ABSENCES:

1. Click the **ADMINISTRATOR** drop down, click **Job Inquiry/Reports.** Absence Information will remain in SmartFind Express for 730 days.
2. Click the drop down beside **Job Status** and select **All, exclude canceled.**
3. Enter the date range. Click Search.
4. Absence information will be shown.
5. If a change is needed click the job number.
6. Absence information will open.
7. Click Yes beside Cancel Job if needed. If job is canceled and you need to notify the sub click YES (yes is the default), If you do not want to notify the sub of the cancellation click NO.
8. Add/change sub etc. Click the job number, scroll down to Assigned Substitute, enter the substitute ID or look up by name, click save.
9. Cancel assigned substitute, click the job number, scroll down to Assigned Substitute, click Yes beside cancel the assigned substitute, choose yes or no beside call the assigned substitute, select a cancellation reason from the drop down list and click save.
10. You will return to the **Job Inquiry** page.

TO REVIEW ALL ABSENCES FOR YOUR SCHOOL:

1. Click the **ADMINISTRATOR** drop down, click **Job Inquiry/Reports**. Absence Information will remain in SmartFind Express for 730 days.
2. Job Type = Absences if you do not need to see your vacancies.
3. Click the drop down beside **Job Status** and select **All, exclude canceled**.
4. Enter the date range.
5. Sort Order = Employee Name, then by Start Date.
6. Click Search.
7. Absence information will be shown.
8. Click Create Report; Select your parameters, Click View Report. Print or Save as needed.

TO REVIEW ABSENCES FOR ONE EMPLOYEE:

1. Click the **ADMINISTRATOR** drop down, click **Job Inquiry/Reports**.
2. Click the drop down beside **Job Status** and select **All, exclude canceled**.
3. Enter the date range.
4. Click Sort Order = Start Date
5. Click More Search Options
6. Enter Employee Id or look up by name
7. Click Search, Absences for the employee will display.
8. Click Create Report; Select your parameters, Click View Report. Print or Save.

TO REVIEW ABSENCE TOTALS PER EMPLOYEE:

1. Click the **ADMINISTRATOR** drop down, click **Job Inquiry/Reports**. Absence Information will remain in SmartFind Express for 730 days.
2. Job Type = Absences
3. Click the drop down beside Job Status and select All, exclude canceled.
4. Enter the date range.
5. Sort Order = Employee Name
6. Click Search.
7. Click Create Report;
8. Remove the check mark beside Print Details
9. Under Print Totals for Primary Sort, Put a check mark beside Totals by Reason
10. Click View Report. Print or Save as needed.

TO SEARCH FOR A SPECIFIC EMPLOYEE OR SUBSTITUTE:

1. Click the **ADMINISTRATOR** drop down, click **Profile Inquiry/Reports**, click General
2. Search by name, or Access Id etc.

TO REVIEW EMPLOYEE LIST:

1. Click the **ADMINISTRATOR** drop down, click **Profile Inquiry/Reports**, click Employee
2. Select Search Criteria, Status = Active
3. Select your Location
4. Click Search, Click Create Report; Select your parameters, Click View Report. Print or Save.

TO REVIEW SUBSTITUTE LIST:

1. Click the **ADMINISTRATOR** drop down, click **Profile Inquiry/Reports**, click Substitute
2. Select Search Criteria, Status = Active, Registered = Yes, Expired Subs = NO.
3. Click Search, Click Create Report; Select your parameters, or Click View Report under Sub List.
4. Click View Report. Print or Save.

TO CREATE OR MODIFY PRIORITY LIST:

1. Click the **ADMINISTRATOR** drop down, click Priority Lists.
2. Click New to add a substitute. Enter Id or look up by name.
3. Click substitute name to select. Select Preferred from drop down.
4. Select Location.
5. Select Sub list and Level, Click Save

TO REVIEW FOR PAYROLL VERIFICATION:

1. Click the **ADMINISTRATOR** drop down, click **Job Inquiry/Reports**
2. Click the drop down beside **Job Status** and select All, exclude canceled.
3. Enter the date range = Current Payroll range.
4. Click the drop down beside **Sort Order** and select Location Name.
5. Click **More Search Options**.
6. Click the drop down beside **Classification Group** and select **Payroll Report Classifications 001**.
7. Click Search
8. **REVIEW** All Absence Information. Make any needed corrections. If more than one page or absence information exists a **NEXT** button will be at the bottom of the page.
9. **When all information is correct THE PRINCIPAL will login to verify.**

TO VIEW UNVERIFIED ABSENCES:

1. Click the **ADMINISTRATOR** drop down, click **Job Inquiry/Reports**
2. Click the drop down beside **Job Status** and select **Finished**.
3. Enter the date range. Current Payroll range.
4. Click the drop down beside **Sort Order** and select Start Date.
5. Click **More Search Options**.
6. Click the drop down beside **Classification Group** and select **Payroll Report Classifications 001**.
7. Click Search
8. If any absences are at the bottom of the page they have **not been** verified and steps 10-18 from the above section **TO VERIFY FOR PAYROLL** need to be completed.
9. If the message **NO RECORDS FOUND** is at the top of the page all absences **have been** verified.

REPORTS:

1. Click the **REPORTS** drop down
2. Click Report List to View Frequently used reports.
3. Click the link for the report you want to use.
4. Or click Today's Jobs, Today's Available Substitutes, or Active Substitutes: Schedule/Unavailability to view these Reports.

MY SAVED REPORTS:

1. To create your own saved reports
2. Click the **REPORTS** drop down
3. Click Report List
4. Click the link for the report you want, i.e. Job Inquiry
5. Enter Your Search Criteria
6. Select your Output Format from the drop down, i.e. HTML, PDF, DOCX, and etc.
7. Select your Parameters under Print Details
8. Enter a Report Name and Description
9. Click Save Report, or Save & View.
10. **If you don't want to save the report** Click View Report.
11. Once you have saved your reports, Click the **REPORTS** drop down, Click My Saved Reports
12. Click View Report beside the Report Name to view your saved report.
13. Click Edit Report beside the Report Name to change your saved report and run again.
14. You can change your Search Criteria, i.e. date range, job status and etc. and run the report again with the same parameters.
15. Or you can change the Search Criteria and Parameters and run the report.
16. Click **View Report** to view or Save again with your new information.