

**Welcome to the Unified Talent  
PowerSchool PowerUp!**



**August 2023**

# Today's Agenda

- Welcome
- Back To School Resources
- Professional Learning New PD Administration
- Breakout Rooms
  - Applicant Tracking
  - Employee Records
  - Perform
  - Professional Learning
  - SchoolSpring
  - SmartFind Express



# Back to School Resources

- Primary Point(s) of Contact
  - Customer Success Manager
  - Account Owner
- Something isn't working
  - Support Case
- Need help with Best Practices
  - Education Impact Consultant
  - Strategic Solution Consultant
- Need Training
  - Customer Education



# Professional Learning

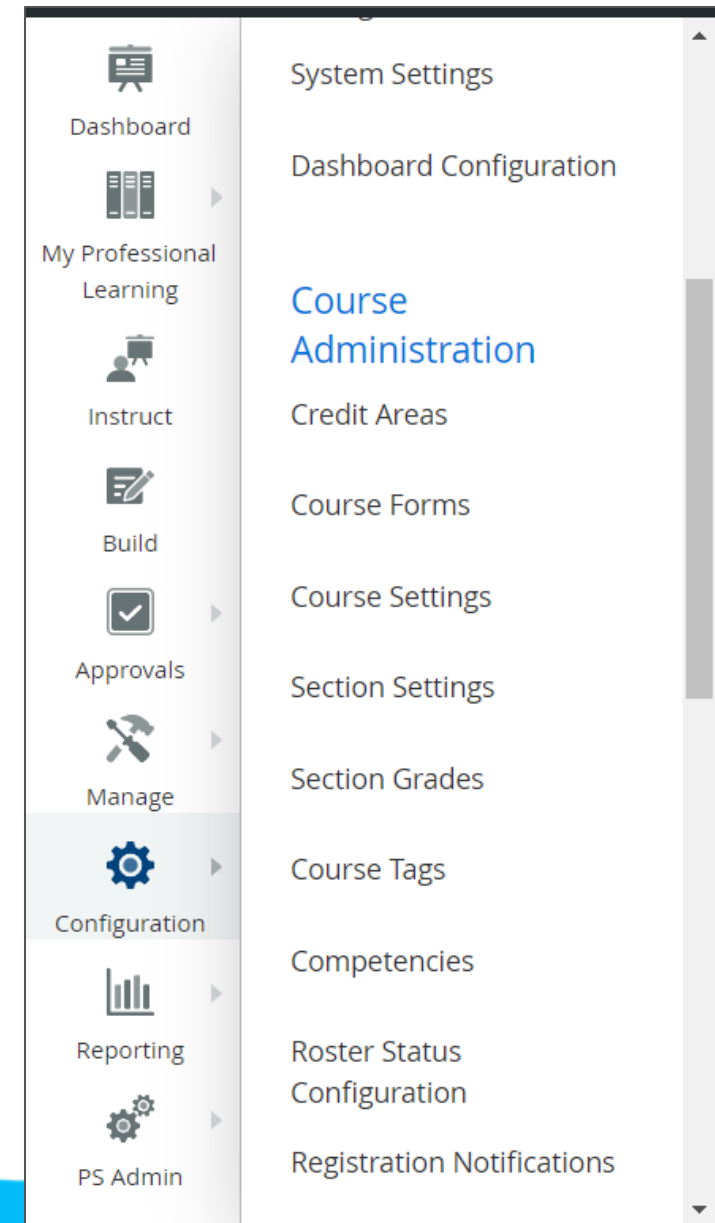
New PD Administration

# The *New* Professional Learning

**Self-Serviceability** that makes it easy for Professional Learning to work for *your* district

- Configure roles and permissions without asking PowerSchool!
- Configure courses and sections without asking PowerSchool!
- Configure your Professional Learning **without asking PowerSchool!**

Customers with the New Professional Learning felt it was **23% easier to make configuration changes** and felt they had **30% more autonomy** over their Professional Learning product.

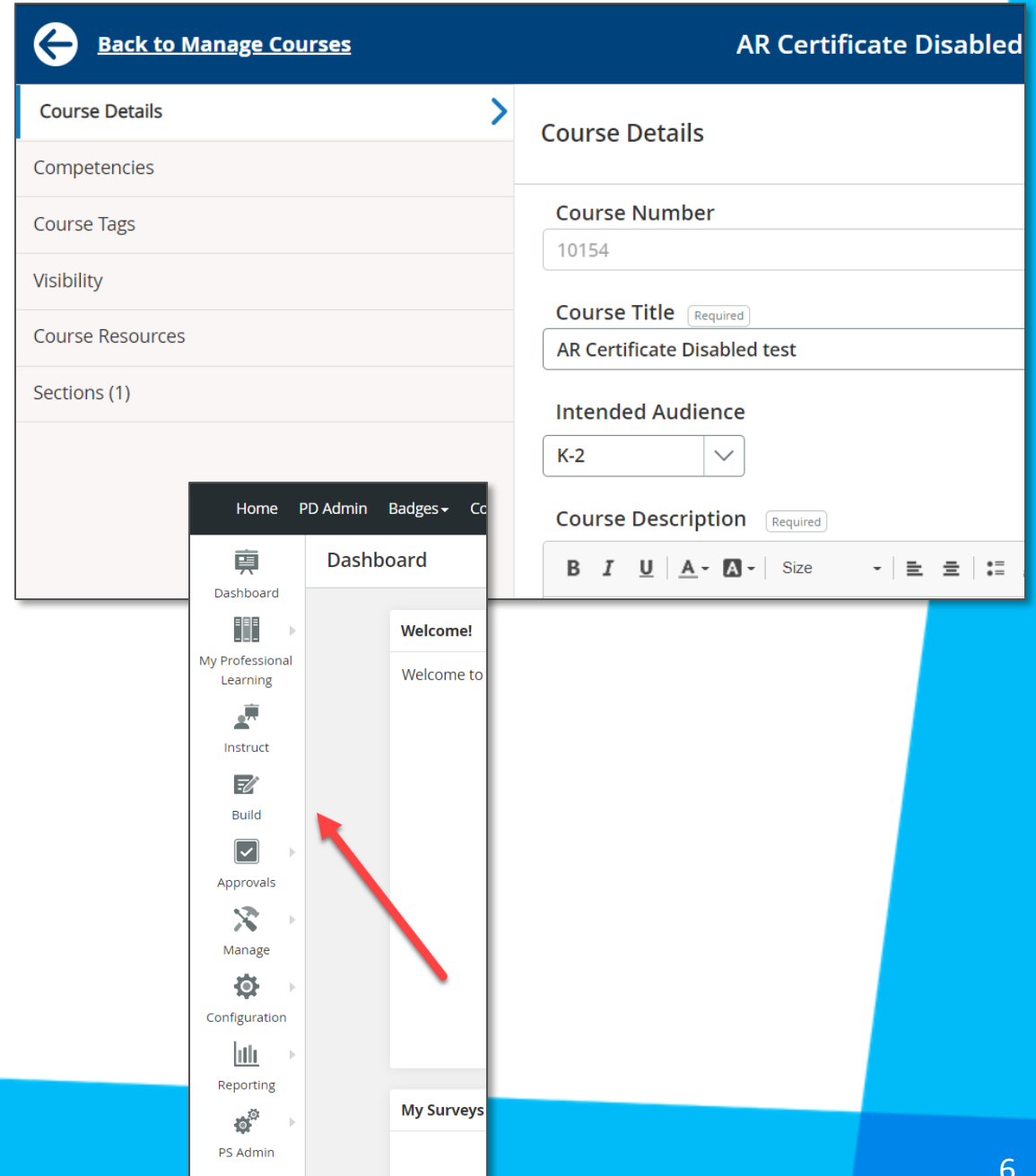


# The *New* Professional Learning

**Modern, intuitive design** that is simpler to navigate with a familiar PS interface

- Course information all on one page!
- Easier survey creation and management
- Everything you need is one click away on the left-side navigation bar
- Look and feel matches your other PowerSchool products!

Customers with the New Professional Learning created **65% less support tickets** than customers with the Old Professional Learning.



# Your Talent Education Impact Consultant Team



**Sean Vair**

**Experience:**

Classroom Teacher / Dept Coord  
*11 Years*

Educational Technology  
*8 Years*



**Stuart Aron**

**Experience:**

Teacher & Coach  
*32 Years*

Educational Technology  
*4 Years*



**Cortnie Shaffer**

**Experience:**

Classroom Teacher  
*5 Years*

Assistant Principal  
*3 Years*

Education Technology  
*1 Year*

# Your Talent Education Impact Consultant Team



**Edie Smith**

**Experience:**

Administrative & Onboarding  
*2 Years*

K-12 HR Software Administrator  
*4.5 Years*

Education Technology  
*1 Year*



**Marissa Gonzalez**

**Experience:**

Teacher and Specialist  
*9 Years*

District Level  
*8 Years*

Educational Technology  
*1 Year*



**Caitie Moss**

**Experience:**

Teacher and Building Level Tech  
Expert  
*10 Years*

Educational Technology  
*1 Year*



# Breakout Room Topics

## Applicant Tracking

- Maximizing Reporting

## Employee Records & Onboarding

- Targeting Checklists for the Start of the Year

## Perform (Product)

- New Roles Management & Scheduled Exports

## Professional Learning

- Reporting Basics

## SchoolSpring (Product)

- New User Interface

## SmartFind Express

- Planning for Success in the New School Year

# Applicant Tracking

Maximizing Reporting

# Agenda

- 1 Reporting in Applicant Tracking
- 2 Where to Start
- 3 Customizing
- 4 Questions

# Reporting in Applicant Tracking

- Why do you run reports?
- Which reports do you most frequently use?
- How often do you run reports?
- How do reports improve your hiring practices?



# Where to Start

- Useful built in reports
  - Report Sections
    - Monitoring
    - Hires
    - Application Reports
    - Recruiting
    - How to Create Custom Sections
  - Deconstruct

The screenshot displays a web application interface for reports. At the top, there is a 'REPORTS' section with a sub-header 'Click an icon to view, download, edit, copy or delete a report. Click the NEW REPORT button to create a custom report.' Below this are three buttons: 'MANAGE REPORT CATEGORIES', 'NEW CUSTOM SQL REPORT', and 'NEW REPORT'. The main content is organized into several sections:

- REPORTS**: Includes 'Background Check Info' and 'Red Flag Applicants'.
- APPLICATION REPORTS**: Includes 'Applications Per Day', 'Career Day 2', 'Employment History Report', 'Outstanding Interviews', 'Prescreening Status', 'Seniority Date Report', and 'Withdrawn Applications'.
- HIRES**: Includes 'Closed Position Summary', 'Closed Position Summary - Federal 2010', 'EEOC Report', 'EEOC Report - Federal 2010', 'EEOC Report By Date', 'EEOC Report By Date - Federal 2010', 'Hire Queue', and 'Job Category Summary'.
- RECRUITING**: Includes 'Applicant Sourcing', 'Career Day', 'Job Fair Comparison', 'Job Fair Summary', and 'Job Posting Interviews'.
- MONITORING**: Includes 'Job Posting Interviews', 'System Monitor - Candidate Applications', 'System Monitor - Login History For All Users', 'System Monitor - Login History For Each User', and 'System Monitor - Overall Application Usage'.
- OTHER**: Includes 'Blah', 'Recommend to Hire', 'Recommend to Hire', and 'Sample SQL Report'.
- CUSTOM FORMS**: Includes 'Recommend to Hire', 'Recommend to Hire', and 'Recommendation Test'.

A 'NEW REPORT' button is located at the bottom right of the interface.

# Customizing/ Building

- Report Categories
- Editing Reports
  - Description
  - Fields
  - Filters
  - Sorting
  - Schedule
  - Sharing
- New Reports
- Custom SQL Report

## 1 - REPORT DESCRIPTION

1 - DESCRIPTION 2 - FIELDS 3 - FILTERS 4 - SORTING 5 - DISPLAY FORMATTING 6 - SHARING 7 - SQL QUERY

Report Type: \* **Hires** This determines the set of fields you will have to select from.

Title: \*

Category: \*

Description:

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# Upcoming Events

Register for Unified Talent PowerUps (Applicant Tracking) - 2023



[Register Now for Unified Talent 2023 PowerUps \(Applicant Tracking\)](#)

The goal of the Applicant Tracking PowerUps meetings is to provide a forum for district leaders to collaborate, communicate, and learn from our team and one another about Applicant Tracking.

**Register to attend these FREE sessions**

**Topic: Maximizing Reporting**

Aug 8, 2023 09:00 AM PT  
Aug 9, 2023 07:00 AM PT  
Aug 10, 2023 12:00 PM PT

[REGISTER NOW](#)

**Previous Recording:**

January	<b>Preparing for Job Fairs &amp; Career Days</b> - <a href="#">Watch the Recording</a>
February	<b>Email Notification Best Practices</b> - <a href="#">Watch the Recording</a>
March	<b>Analyzing &amp; Building User &amp; Custom Filters, Applicant Tracking/Records Begin Hire Integration</b> - <a href="#">Watch the Recording</a>
April	<b>Managing Interviews</b> - <a href="#">Watch the Recording</a>
May	<b>Customizing Employment History Verification</b> - <a href="#">Watch the Recording</a>

As always, we will email the recording to all registrants and post the recording on the PowerSchool Community, once the session is complete.

We look forward to connecting with you soon.



## Office Hours

[Register Now for Applicant Tracking 2023 Office Hours](#)

Dear Valued Customers,

Connect with PowerSchool Support experts and peers and find solutions to your pain points. During these **hour-long sessions**, you'll learn some insider tips about using the Applicant Tracking solution. In addition, you can ask your questions through a **live Q&A forum** with our Support experts.

**Register to attend these FREE sessions.**

**Last Tuesdays of every month at 12 PM Pacific Time / 3 PM Eastern Time**

**The next session is on August 29, 2023**

**Topic - Job Postings/Requisitions/ Application Types/ Custom Forms**

[REGISTER NOW](#)

### Topics and Recordings:

Date	Topic
Tue 31-Jan-2023	<b>Candidate Portal/Buildings/Locations</b> - <a href="#">Watch the Recording</a>
Tue 28-Feb-2023	<b>Best Practices: Setting up a User, Daily Processes, How to Purge, Notifications, Drop Down Box Choices</b> - <a href="#">Watch the Recording</a>
Tue 28-Mar-2023	<b>Job Postings/Requisitions/ Application Types/ Custom Forms</b> - <a href="#">Watch the Recording</a>
Tue 25-Apr-2023	<b>Interviews/Screenings /Begin Hire/Job Offers</b> - <a href="#">Watch the Recording</a>
Tue 30-May-2023	<b>Views and Reports</b> - <a href="#">Watch the Recording</a>
Tue 27-Jun-2023	<b>Security/ Global Security Settings/ Custom Filters</b> - <a href="#">Watch the Recording</a>



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# Employee Records

Targeting Checklists for the Start of the Year

# Agenda

- 1 Update
- 2 Annual Checklists
- 3 Things to include
- 4 Options for Bulk Assigning
- 5 Questions

# Upcoming Release – 23.8.0.0

- Improvements to the PDF Form Builder
  - New "Link" Capability to embed links directly on your forms. URLs must start with "http://" or "https://"
  - The size of the Accessibility Label property has been increased to 2000 characters

Full Release Notes: [Release 23.8.0.0 - August 2023 \(powerschool-docs.com\)](https://powerschool-docs.com/release/23.8.0.0)

This release is scheduled for approximately 10:30 PM CT Sunday, August 20th, 2023.

# Reasons to prepare and send Annual Checklists

- To have a comprehensive list of things that need to be completed when returning for the new school year
- Nice way to welcome staff back
- Compliance needs
- Help make Employee Records a central location for staff paperwork

# Things to consider including

## Letters and Resources

- Welcome Letter
- Account Information
- Who to contact for assistance

## Annual and New Policies

## Review or Update Address

# Things to consider including

## Overview of Available Forms

- Emergency Contact
- Name Change
- FMLA
- Changes to Benefits

## Information regarding Benefits

- Where to locate more info
- Who to contact
- Quick reference information (e.g. Annual Leave, ERP)

# Bulk Assigning Checklists

## Configuration

- Access
  - Version
  - Full Records
- Security Level
  - System Admin or Custom
- Search
  - Name, Job Type, Job Title, Location, or Hire Date
- Select all
- Select individual
- Assign Due Date

## Custom Reports

- Access
  - Set Up
    - Export settings must be set to Collapse data
- Security Level
  - System Admin, HR Staff\*, or Custom
- Filter
  - Location or Job Types
- Assign to all results



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# Upcoming Sessions

- PowerUps:
  - [Registration Link](#)
  - Tuesday, September 12, 2023 at 9AM Pacific/12PM Eastern
  - Wednesday, September 13, 2023 at 7AM Pacific/10AM Eastern
  - Thursday, September 14, 2023 at 12PM Pacific/3PM Eastern
  - Recordings of previous sessions: [Records PowerUps](#)
- Office Hours:
  - [Registration Link](#)
  - Wednesday, August 30th, 2023 at 12PM Pacific/3PM Eastern
  - Recordings of Previous Sessions: [Records Office Hours](#)



# Professional Learning

Reporting Basics



August 2023



# Agenda

- 1 Staff Dashboard
- 2 Course Dashboard
- 3 Ad-Hoc Reporting
- 4 Reporting in PD Admin

# Staff Dashboard

## Staff Dashboard

Staff Dashboard

Include Inactive Users

- ▶ Browse Staff by Site
- ▶ Browse Staff by Demographics
- ▶ Search Staff
- ▶ Saved Staff Groups

Group Dashboard   Group Reports   Individual Information   **Course Completion Reporting**

Course Number:  Use "" or a comma separated list for specific course numbers.

Course Title:

Section Number:  Use "" or a comma separated list for specific section numbers.

Section Title:

Office:

Section Start Date: **Between**  **Reset** **and**  **Reset**

Section End Date: **Between**  **Reset** **and**  **Reset**

Status:  Not Registered  
 Registered  
 Completed

# Course Dashboard

▶ Browse Learning Opportunities by Instructor

▶ Search Learning Opportunities

▶ Saved Learning Opportunity Groups

### Learning Opportunity Dashboard

Learning Opportunity Dashboard

▼ Browse Learning Opportunities by Instructor

**Last Name, First Name (# Sections)**

- Abbott, Pat (6)
- admin, demo (1)
- Administrator, PowerSchool (13)
- Cino, Joey (1)
- Educator, Adam (1)
- Educator, Alexis (14)
- Educator, Archer. (3)
- Educator, Becky (1)
- Educator, Ethan (3)
- Educator, George (4)
- Educator, Heather (1)
- Educator, Henry (1)
- Educator, James (1)
- Educator, Matt (2)
- Gomez, Selena (11)
- Instructor, Bill (4)

▶ Search Learning Opportunities

▶ Saved Learning Opportunity Groups

Sections with the following Instructors: PowerSchool Administrator

[Save this Group](#)

1. 177: \*\* Using Baseball Card and 201: Spring 2019
2. 177: \*\* Using Baseball Card and 202: Summer 2019 - approval
3. 74: \*Are You SMARTER than You 71: Smartboard Basics
4. 75: \*Bloodborne Pathogens 75: \*Bloodborne Pathogens
5. PD11OC107M: Assessment: Get 13: Assessment: Getting Started
6. 180: AVID Refresher 215: Fall 2019
7. PD11OC117: Differentiated Instr 15: Differentiated Instruction: U
8. 28: Educator Evaluation 25: Educator Evaluation Spring C
9. 139: Famous Americans in the P 181: Copy of: Famous American:
10. 139: Famous Americans in the P 155: Famous Americans - June 1
11. 236: Literature in Math 257: Session 1
12. 95: Using Formative Assessment 98: Using Formative Assessment
13. 217: Using Schoology with Profe 239: February 5th

Group Dashboard | **Group Reports** | Learning Opportunity Information

Please Select an Area on which to Report: Attendance and Registration

Sections with the following Instructors: PowerSchool Administrator

**Attendance and Registration**

**Attendance Statistics**

● Attended All ● Attended None  
● Attended Some

**Class Size Statistics**

■ Avg Class Size ■ Max Class Size ■ Min Class Size

Note: This data is only accurate so far as attendance was recorded in the system by the instructors.

**Registration Status**

# Ad-Hoc Reporting

Ad Hoc feature allows users to **customize, share** and **run** multiple reports tailored to unique permission levels.

New Report

## Courses

Search the courses of the Course Management system. This search can include archived or historical courses. Filtering can be done on targeted demographics.

New Report

## Roster

Search for roster information in the Course Management system. Can search grades, registration status, completion date, etc.

New Report

## Sections

Search Sections in the Course Management system. Can search start and end date/time, wait list size, etc.

# Ad-Hoc Reporting

### Run Report

Report Type:  Raw Data  Graphical

**Save**

Name:

(Any report with the same name will be overwritten.)

Description:

Restrict Results by Course Rights

Restrict Results by User Rights

Report Type:  Raw Data  Graphical

Include Summary Rows

Select All 
Sort  ↑  ↓
Filter Option 
Graph Option
SEARCH SECTIONS

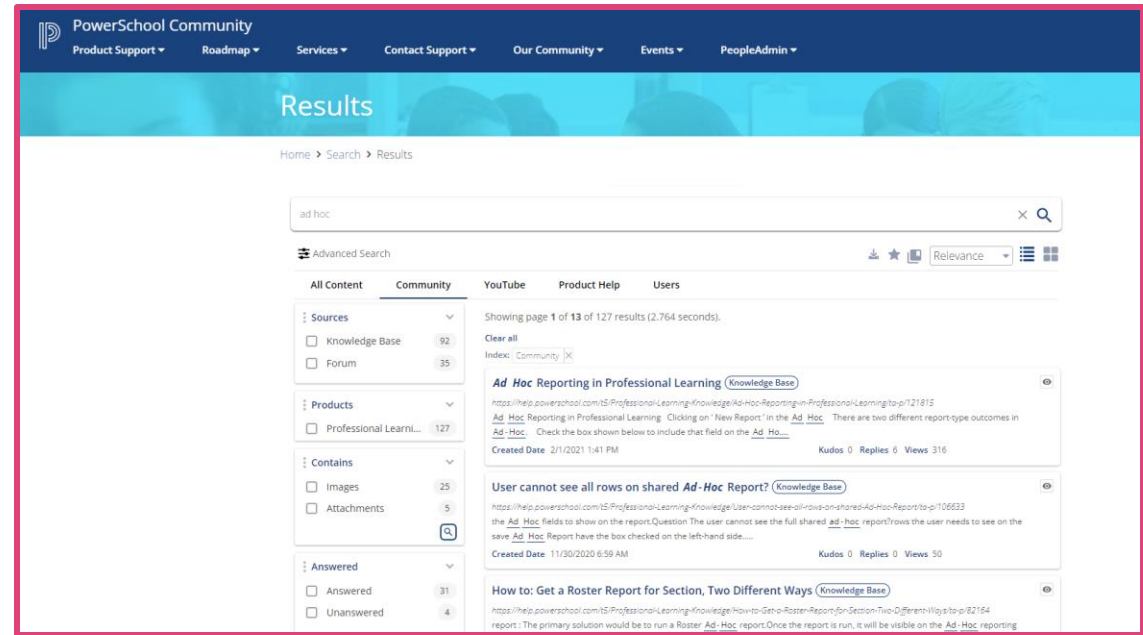
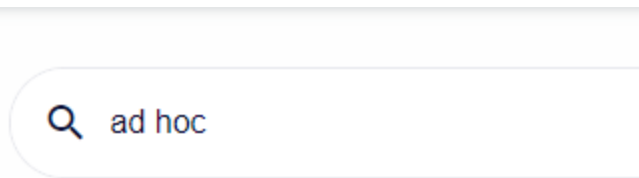
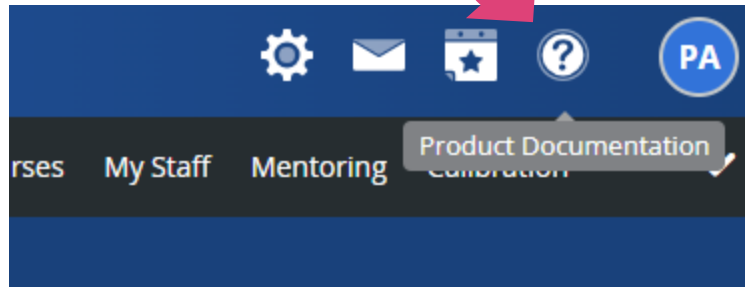
Select	Sort	Filter Option	Graph Option	SEARCH SECTIONS
<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	Pie <input type="radio"/>   Bar <input type="radio"/>   <input type="checkbox"/>	Section # <input type="text" value="Contains"/>
<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	Pie <input type="radio"/>   Bar <input type="radio"/>   <input type="checkbox"/>	Section Title <input type="text" value="Contains"/>
<input type="checkbox"/>	<input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	Pie <input type="radio"/>   Bar <input type="radio"/>   <input type="checkbox"/>	Attendance <input type="text" value="Equals"/> <input type="text" value="--"/>
<input type="checkbox"/>	<input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	Pie <input type="radio"/>   Bar <input type="radio"/>   <input type="checkbox"/>	Training Link <input type="text" value="Contains"/>
<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	Pie <input type="radio"/>   Bar <input type="radio"/>   <input type="checkbox"/>	Start Date <input type="text" value="Equals"/> <input type="text" value="--"/> <input type="button" value="Reset"/>
<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	Pie <input type="radio"/>   Bar <input type="radio"/>   <input type="checkbox"/>	End Date <input type="text" value="Equals"/> <input type="text" value="--"/> <input type="button" value="Reset"/>
<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	Pie <input type="radio"/>   Bar <input type="radio"/>   <input type="checkbox"/>	Start Time <input type="text" value="Equals"/> <input type="text" value="--"/> <input type="text" value="--"/> <input type="text" value="--"/>
<input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	Pie <input type="radio"/>   Bar <input type="radio"/>   <input type="checkbox"/>	End Time <input type="text" value="Equals"/> <input type="text" value="--"/> <input type="text" value="--"/> <input type="text" value="--"/>

# Reporting in PD Admin

The screenshot displays the PD Admin web application interface. At the top, a navigation bar includes links for Home, PD Admin (highlighted with a red box), Badges, Courses, Transcript, and Salary Scale. The main content area is titled "Dashboard" and features a "Welcome!" message: "Welcome to the Professional Learning system". On the left sidebar, the "Reporting" menu item (represented by a bar chart icon) is highlighted with a red box. A dropdown menu is open from this item, listing three options: "Adhoc Reporting (PD Reports)", "Adhoc Reporting (All Reports)", and "Report Builder". Other sidebar items include Dashboard, Professional Learning, Instruct, Build, Approvals, Manage, Configuration, PS Admin, and Catalog. At the bottom right, there is a section for "Unified Talent Mobile" with a QR code and text: "Introducing the Unified Talent Mobile" and "Download the app to view PD courses as both a scanning the QR code on sign-in sheets. As an in".



# Need More Information



Reach out to your CSM and connect with an EIC



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# SchoolSpring Updates

May, 2023



# Agenda

- 1 Welcome
- 2 SchoolSpring Updates
- 3 General Q/A
- 4 Wrap-up



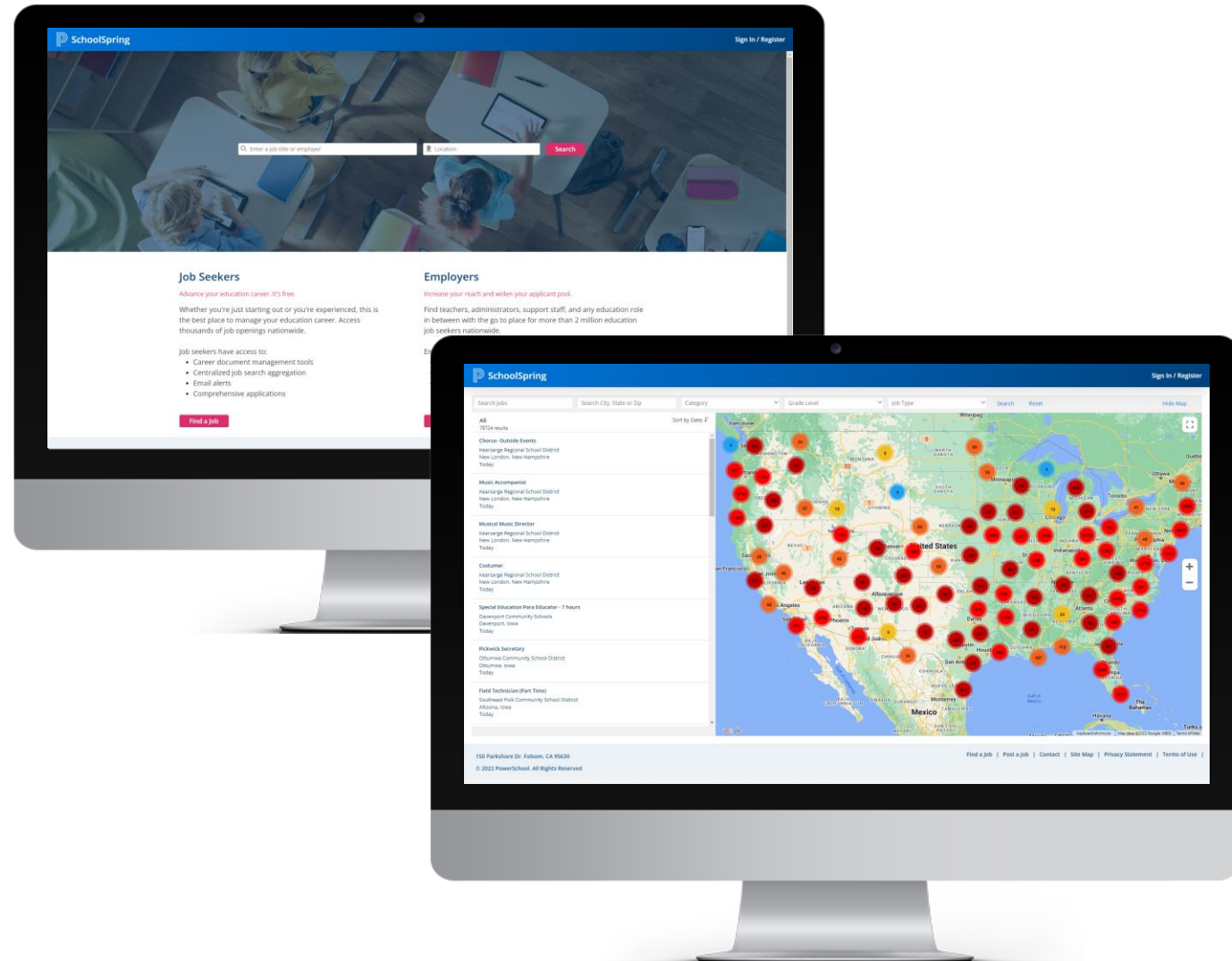
# SchoolSpring – New User Interface

## Modern, accessible, mobile friendly

### Highlights

- Dynamic map
- SchoolSpring will direct job seekers to consortium or ATS district site\*

*\*Requires new ATS enhanced candidate portal*



# SchoolSpring

## New Job Seeker Portal

*In Controlled Availability*

**Simplified, modern  
applicant experience**

### Highlights:

- Streamlined navigation
- Same SchoolSpring features
  - Save Jobs
  - Job Alerts
  - Single Sign on with Unified Talent Applicant Tracking
- In-app walkthroughs, KnowledgeBot

The screenshot displays the user profile interface for Ms. Stella Garland. At the top, the SchoolSpring logo and 'Unified Talent' tagline are visible. The user's name, 'Ms. Stella Garland', is accompanied by a profile picture with the initials 'SG', a phone number '916-596-0011', and an email address 'Stella.Garland@xyz.com'. A navigation menu on the left includes 'Find a Job', 'Jobs', and 'My Profile'. The 'My Profile' section is active, showing a list of profile categories: Personal Information (checked), Professional Experience, Education (selected), Licenses & Certificates, References (checked), Other Experience, Additional Information (checked), and Attachments (checked). An 'Add Education' button is located above the education entry. The education entry for 'The Hotchkiss School' is listed as a 'High School' from '2001-2003', with edit and delete icons. The PowerSchool logo is in the bottom right corner.

# SchoolSpring Single Candidate Portal

Target Release: Fall 2023

Applicants manage all  
SchoolSpring & ATS jobs in  
one place

## Highlights:

- One login to apply
- ATS Application statuses sync to SchoolSpring applicant portal
- ATS actions (screenings, interviews, job offers) sync to SchoolSpring applicant portal
- Applicant profile fields auto populate ATS applications

Find a Job Apply to Email Notification Test

Personal Information

This section contains profile data. Any changes made will also be made on your Profile.

Demographic Information

Gender

Not provided

Male

Female

Are you Hispanic or Latino?

Yes

No

Other Race(s)

Alaska Native

American Indian

Asian

Black or African American

Filipino

Native Hawaiian or other Pacific Islander

White (not of Hispanic origin)

Veteran Status

Not provided

Veteran Branch

Air Force

Veteran Country

Previous

SchoolSpring

Find a Job

My Jobs

My Profile

### Job Applications

Submitted Applications Incomplete Applications

All Search

Job Title	School District	Status	Application Date	Actions	Job Application
Lead Teacher	Los Angeles Unified School District	Application Received	08/23/2022	Interview	View
Senior Teacher	Martin County School District	Hired	07/13/2022	Job offer	View
Senior Teacher	Los Angeles Unified School District	Application Received	07/01/2022	Screening	View
Associate Teacher	Martin County School District	Application Received	06/27/2022	Interview Screening	View
Lead Teacher	Santa Ana Unified School District	Application Received	06/20/2022	Go To Action	View
Teacher	Santa Ana Unified School District	Closed	06/13/2022	Closed	View

# SmartFind Express

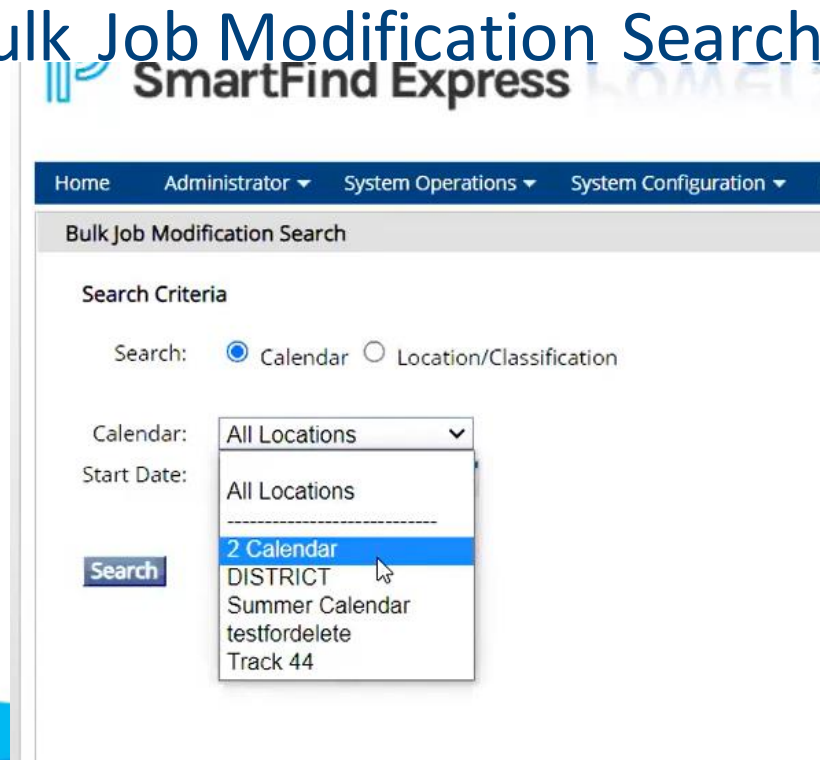
Planning for Success in the New School Year

# Agenda

- 1 **Calendar Update: Bulk Job Modifications**
- 2 **Review Roles and Permissions**
- 3 **Reports to Save or Schedule**
- 4 **Sharing Resources & Training**
- 5 **Questions**

# Calendar & Bulk Job Modifications

- Bulk job modifications allows you to block holidays, eachers' works days, snow days, etc. When there is already a job booked on that day.
- System Configuration>Calendar>Search
- System Operations>Mass Update>Bulk Job Modification Search



The screenshot shows the 'Bulk Job Modification Search' interface in SmartFind Express. The navigation bar includes 'Home', 'Administrator', 'System Operations', and 'System Configuration'. The page title is 'Bulk Job Modification Search'. Under 'Search Criteria', there are two radio buttons: 'Calendar' (selected) and 'Location/Classification'. Below this, there are two dropdown menus: 'Calendar:' and 'Start Date:'. The 'Calendar:' dropdown is open, showing a list of options: 'All Locations', '2 Calendar', 'DISTRICT', 'Summer Calendar', 'testfordelete', and 'Track 44'. A mouse cursor is pointing at '2 Calendar'. A 'Search' button is located to the left of the dropdown menus.

# Calendar & Bulk Job Modification

- Select the date
- Select from:
  - No Calendar Entry – Removes a previously scheduled event
  - No Substitute Required – Staff lose a day but no substitute is needed to fill
  - Holiday – No request off or sub is needed
- Provide it with a unique name

### Calendar

Modify Date: 08/18/2023

No Calendar Entry  
 No Substitute Required  
 Holiday

\* Name:

\* From:  \* To:    
(MM/DD/YYYY) (MM/DD/YYYY)

[Save](#) [Return To List](#)

< [Prev Month](#) All Locations August 2023 [Next Month](#) >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

# Updating System Info



Profile Basic Information  
Import



Approving Admin Import  
and/or Profile Based  
Approving Admin



Adjusting Necessary  
Parameters



Text Message Job  
Offers



# Reports to Save or Schedule

# Today's Jobs

- Displays all job information for the administrator's location(s) for a single day.
- On the report setup page, select the search criteria for the report and the data to display on the report.
- Enter a name and description
- Can be viewed, saved, or scheduled.
- Beneficial for location admin to save and schedule for M-F at 7 or 8 am.

The screenshot shows the 'Custom Report Detail' form for 'Today's Jobs'. It includes fields for 'Start Date' (04/07/2020) and 'End Date' (04/07/2020), both with calendar icons. The 'Job Status' is set to 'Open & Active'. 'Location/Group' is 'All Locations', 'Classification/Group' is empty, and 'Reason' is empty. 'Sort By' is 'Job #' and 'Sort Order' is 'Ascending'. 'Output Format' is 'PDF'. Under 'Display Fields', 'Job Status', 'Assigned Substitute', 'Job Times', 'Location', 'Classification', 'Employee Name', and 'Reason' are all checked. The 'Report Title' is 'Today's Jobs'. The 'Save Report As:' section has 'Name: Today's Jobs' and 'Description: Customized report of jobs for a single day'. Buttons for 'Return To List', 'View Report', 'Save Report', 'Save & View', and 'Save & Schedule' are visible.

Sample Report View

Today's Jobs										As of Apr. 07 2020
Job #	Status	Job Date	Job Time	Sub Time	Location	Employee Name	Assigned Sub	Classification	Reason	
606	Stopped	02/03/2020 - 05/28/2020	7:30 AM - 4:00 PM	7:30 AM - 4:00 PM	ZZ Test Location	Vacancy		ZZ Test Classification	job import	
611	Open	04/07/2020 - 04/07/2020	9:30 AM - 4:00 PM	9:30 AM - 4:00 PM	ZZ Test Location	Vacancy		English K-6	Approval vacancy Classified jobs	

# Today's Available Substitutes

- Displays availability information on all substitutes for the current day.
- On the report setup page, select the search criteria for the report and the data to display on the report.
- Enter a name and description for the report.
- Beneficial to save and schedule M-F at 7 or 8 am.

Sample Report View

As of Apr 09, 2020 10:53 AM

### Today's Available Substitutes

Substitute Name	Access ID	Call Back #	Status	Level	New Jobs	Is Reg	Is Exp	Is Cert	Last Day Worked
Admin-Operator, Guest	4444		Active	1	Yes	Yes	No	Yes	
Bradley, Bret	333333		Active	1	Yes	Yes	No	Yes	
Énergie - 1, Suppléant	17777777	514566666	Active	1	Yes	Yes	No	Yes	
Énergie - 2, Suppléant	27777777		Active	1	Yes	Yes	No	Yes	
Griffiths, Dana	92870		Active	1	Yes	Yes	No	Yes	

# Employee Reason Balances

- Displays reason balance information on a single employee or on multiple employees based on the search criteria.
- Based off the Employee Detail Report
- Beneficial for Payroll
- Save and Schedule for a specific date each month.

As of Apr 03, 2020 8:57 AM

### Employee Reason Balances

Name	Access ID					
10072018, 10072019	207					
<b>Reason Balances</b>	<b>Reason</b>	<b>Uses Allocation From</b>		<b>Calculation Date</b>	<b>Interval</b>	
	<b>Allocation</b>	<b>Used</b>	<b>Balance</b>	<b>Pending</b>	<b>Balance After Pending</b>	
Adams, REBECCA	1258					
<b>Reason Balances</b>	<b>Reason</b>	<b>Uses Allocation From</b>		<b>Calculation Date</b>	<b>Interval</b>	
	<b>Allocation</b>	<b>Used</b>	<b>Balance</b>	<b>Pending</b>	<b>Balance After Pending</b>	
Adams, Tom	217					
<b>Reason Balances</b>	<b>Reason</b>	<b>Uses Allocation From</b>		<b>Calculation Date</b>	<b>Interval</b>	
	Stress Sick Jury Duty			11/01/2019 11/01/2019	Hours Days	
	<b>Allocation</b>	<b>Used</b>	<b>Balance</b>	<b>Pending</b>	<b>Balance After Pending</b>	
	400.00	7.30	392.30	0.00	392.30	
	10.0	0.0	10.0	0	10.0	

Custom Report Detail

Employee Reason Balances [Return To List](#)

Report Criteria [Return To List](#)

Access ID:

OR

Status:  All  Active  Inactive

Registered:  All  Yes  No

Itinerant:  All  Yes  No

Calendar:

Classification:  OR

Location:  OR

Type:  From:  To:

Dates:  (MM/DD/YYYY)  (MM/DD/YYYY)

Expired Dates:  (MM/DD/YYYY)  (MM/DD/YYYY)

Custom Fields:

Sort List by:  Name

Then by:  Access ID

Output Format:  PDF

Display Fields -  Select/Deselect All

Primary Sort is on a new page

Secondary sort prints on a new page

Absences: From  (MM/DD/YYYY) To  (MM/DD/YYYY)

Name  Address  Priority Lists

Access ID  Basic Information  Reason Balances

PIN  Comments  Schedule

Web User ID  Dates

Web Password  Custom Fields

External ID

Report Title:  Employee Reason Balances

Save Report As:

Name:  Employee Reason Balances [Save Report](#) [Save & View](#) [Save & Schedule](#)

Description:  Customized report of employee reason balances

[View Report](#) [Return To List](#)

# Substitute Time Worked

- Enables administrators to generate a report of the calculated total hours worked by a substitute.
- Can be filtered by Location/Group and Classification/Group.
- Beneficial for Payroll
- Save and Schedule for a specific date each month.

The screenshot shows a web form titled "Custom Report Detail" for "Substitute Time Worked". It includes fields for "Search from" and "Search to" (both set to 04/03/2020), "Substitute Access ID", "Location/Group" (set to All Locations), "Classification/Group", "Sort By" (Substitute Name), "Sort Order" (Ascending), and "Output Format" (PDF). There are also "Save Report As" options (Name: Substitute Time Worked, Description: Customized report of substitute time worked) and buttons for "View Report" and "Return To List".

## Sample Report View

As of Apr 03, 2020 9:05 AM

Substitute Time Worked			
Substitute Name	Access ID	Total Hours Worked	Hours Accrued
test ,Connie3	3333	7.50	0.25

# Substitute Statistics

- Displays statistics on assignment calls, type of assignment call, and assignment type for all substitutes that match the search criteria. Must enter date range.

As of Apr 03, 2020 9:34 AM

## Substitute Statistics

Name	Access ID	Assignmnt		Hngup	Busy	No Ans	No Rngbk	Oper Intcpt	Web Acpt	Web Decl	Admin Assgnd	Pre-arrngd	Auto Assgnd	Cncl By	Cncl Other	Last Called	Last Worked
		Calls	Accept														
10072019, 10072019	207	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Adams, Mary	123456	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	01/11/2019
ADEJUWON, BRIDGETTE	2629749	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Admin-Operator, Guest	4444	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Bradley, Bret	333333	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Bradley, Jones	535353	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

Custom Report Detail

Substitute Statistics [Return To List](#)

Report Criteria

Status:  All  Active  Inactive

Registered:  All  Yes  No

Available New Jobs:  All  Yes  No

Available Long Term:  All  Yes  No

Certified:  All  Yes  No

Available General Calling:  All  Yes  No

Expired Subs:  All  Yes  No

Available On:  From:  To:

Note: Available On will check Do Not Call, Daily Availability, Expiration dates, Unavailability dates, and Assignments

Daily Availability:  From:  To:

Classification Group:

Level:

Classification:  OR

Location:  OR

Include locations that belong to location groups

Certification:  OR

Holiday Rule List:

Dates: Type  From:  To:

From:  To:

Unavailability Period:  To:

Expired Dates:  To:

Disqualified:  To:

Minimum # Days Worked:

Sort List by:  Then by:

Output Format:

Display Fields

Date:  To:

Report Title:

Save Report As:

Name:  [Save Report](#) [Save & View](#)

Description:

[View Report](#) [Return To List](#)

# Report Resources

- [Report Set Up User Guide](#)
- [Admin User Guide- Report Set Up](#)

# Targeted Announcements

- Targeted announcements can be used to communicate with staff based on the following groups
  - All Users Welcome
  - Location
  - Sub
  - Employee
  - Administrator
  - **All Users Message** - This message will pop up on the users screen when logging into SFE. The users will be required to hit the Acknowledge Message button and the Continue button before moving on
- Administrators>Communications



# Targeted Announcements

The screenshot displays the 'Unified Talent SmartFind Express' interface. On the left is a navigation sidebar with icons and labels for Home, Administrator, System Operations, System Configuration, and Parameters. The main content area is titled 'Communications' and contains a 'New Web Announcement' form. The form includes three dropdown menus: 'Communication Type' (set to 'Web Announcement'), 'Type', and 'Language'. Below these is a large text area for the 'Announcement'. At the bottom of the form are buttons for 'Save', 'Return To List', and 'Preview'. A small note at the bottom right of the text area reads: 'communications won't support iframe, footers, applet and scripts'.

[SFE Web Announcement Message](#)

[SFE September 27<sup>th</sup> Office Hours](#)

# Sharing Resources & Booking Training

- Have you set up BOY training for your substitutes?
- [Substitute Guide: Text Message Job Offers](#)
- [Employee Experience User Guide](#)
- [Substitute Bi-Fold](#)

# Additional Resources:



- [Text Message Job Offer Guide](#)
- Services Options:
  - [Training](#)
  - [KTO Hours - Customizations](#)

## SmartFind Express Release 23.7.0.0 – July 2023

### Product Updates

Product Area	Type	Summary	Release Note
Dashboard	Improvement	New Feature Bookmarked Reports	<p>The new Admin/Operator dashboards were added in the previous SFE 22.6 release. They can be enabled by checking the checkbox for "Show new Admin dashboards" which is a parameter within Parameters - Administrator - Browser Access section. A new feature has been added to the new Admin dashboard to show bookmarked reports in the SFE 22.7 release. The Admins/Operators can bookmark the reports (from the reports list) which they use most frequently, and they would show up on the "My Bookmarked Reports" section on the new dashboard.</p> <p>Note: The new admin/operator dashboards will default to ON in the SFE 22.8 August release.</p>
Reports	Improvement	Pause and Resume text support for Texting feature	<p>Currently substitutes who opted to receive Text messages can use the keywords Stop and Unstop for opting out/in of the text messaging feature. Additional keywords have been added to support this functionality. Pause can be used to opt out of text messaging feature and Resume can be used to opt back in the texting feature.</p>



PowerSchool