

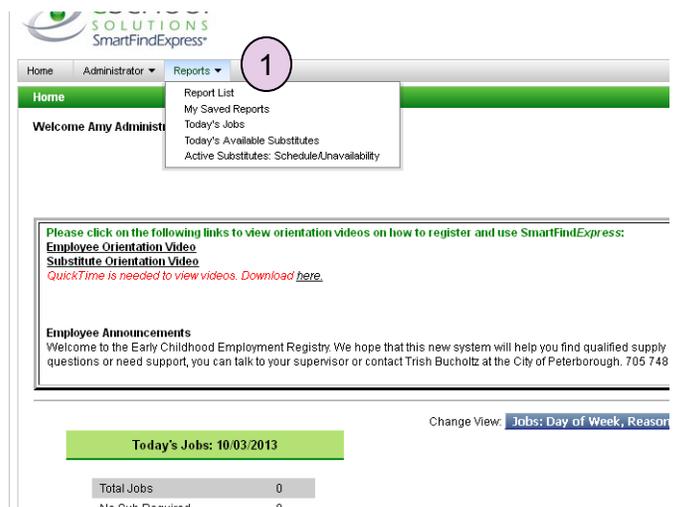
# Today's Job Report

## Setting Up Email Notification

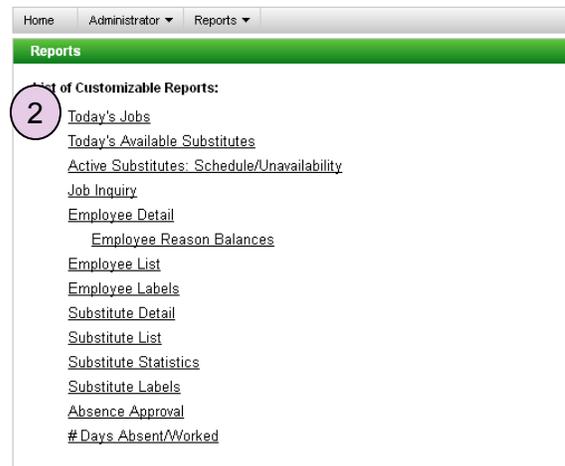
The Today's Jobs Report will give you a list of who has posted an absence, what has been filled, what is yet to be filled and whether a substitute has canceled a job they had agreed to. The following steps will help you set up the report and then set up a schedule for receiving regular emails with all the details. Once you set up this report, you will be able to change either the details of the report or edit the schedule you have set up for emails.

Steps:

1. Go to **Reports** and choose **Report List**. (Do not choose the Today's Jobs options from the drop down list in Reports. You will get the report as is, but you want to set up further details.)



2. Choose **Today's Jobs** from the list.



## Steps:

- Don't choose a date as you want the report to give you new information each day and not just for the day you have entered.
- Choose the **Job status** of jobs you are wanting to see (if you only want to see open and active jobs you would choose that.)
- It is recommended that you choose **All, Include Canceled**. This will tell you what posting is filled, not filled and canceled.
- The only reason to choose a classification or reason is if you want to know about specific jobs. (For example you would choose reason if you wanted to see all job postings for those away due to illness.)
- Choose how you want to **Sort** the details. Do you want to see them by job number, by name of employee, or by the reason the employee is away)
- Choose the **Output Format** for getting the report. The default is HTML which is fine, although the report tends to be lengthy due to long breaks between data. It is recommended that you choose PDF.
- Display Fields:** You can choose what information will be in the report by choosing which fields to display. Do you want to know the job status (is the job still open or has it been filled)? Do you want to know who the assigned substitute will be? Do you want to know which location the job is posted for? Do you want to know what the classification of the employee is?

Home Administrator Reports

### Custom Report Detail

Today's Jobs

Report Criteria [Return To List](#)

Date: 10/03/2013 (MM/DD/YYYY) **3**

Job Status: All, include canceled **4/5**

Location/Group: Pemberly Child Care Centre - test site. Not real

Classification/Group: **6**

Reason:

Sort By: Job # **7** Sort Order: Ascending

Output Format: PDF

Display Fields -  Select/Deselect All

<input checked="" type="checkbox"/> Job Status	<input checked="" type="checkbox"/> Location	<input checked="" type="checkbox"/> Employee Name
<input checked="" type="checkbox"/> Assigned Substitute	<input checked="" type="checkbox"/> Classification	<input checked="" type="checkbox"/> Reason

Report Title: Daily Absence Report

Save Report As:

Name: Daily Absence Report [Save Report](#) [Save & View](#) [Save & Schedule](#)

Description: Customized report of jobs for a single day

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

Home Administrator Reports

### Custom Report Detail

Today's Jobs

Report Criteria [Return To List](#)

Date: 10/03/2013 (MM/DD/YYYY)

Job Status: All, include canceled

Location/Group: Pemberly Child Care Centre - test site. Not real

Classification/Group:

Reason:

Sort By: Job # Sort Order: Ascending

Output Format: PDF **8**

Display Fields -  Select/Deselect All **9**

<input checked="" type="checkbox"/> Job Status	<input checked="" type="checkbox"/> Location	<input checked="" type="checkbox"/> Employee Name
<input checked="" type="checkbox"/> Assigned Substitute	<input checked="" type="checkbox"/> Classification	<input checked="" type="checkbox"/> Reason

Report Title: Daily Absence Report

Save Report As:

Name: Daily Absence Report [Save Report](#) [Save & View](#) [Save & Schedule](#)

Description: Customized report of jobs for a single day

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

Steps:

10. Change the name of the **Report Title** to something that will tell you what the report is. (for example: Daily Absence Notification Report)
11. Now **Save the Report As**: change the name to be the same as the Report Title.
12. You can change the **Description**, but it is not necessary.
13. to just view the report and not save it, choose View Report. To save it or schedule ongoing email notifications, do not View the Report.

Sort By: Job #      Sort Order: Ascending  
Output Format: PDF

Display Fields -  Select/Deselect All

Job Status       Location       Employee Name  
 Assigned Substitute       Classification       Reason

10 Report Title: Daily Absence Report

11 Save Report As:  
Name: Daily Absence Report      Save Report      Save & View      Save & Schedule

12 Description: Customized report of jobs for a single day      14

13 View Report      Return To List

**To Set Up a Schedule of Email Notifications**

14. Choose **Save & Schedule**
15. When the Scheduling screen comes up, there will be a red notice at the top telling you that the report has been save successfully. If you do not get this notice, you will need to look at your report criteria again to see what you missed.
16. DO NOT choose a scheduled start date. Leave that blank.
17. Choose **Calendar Reoccurrence**.

Home      Administrator      Reports

Schedule Report

15 Daily Absence Notification Report has been saved successfully.

16 Schedule start:      Date      Time  
(MM/DD/YYYY)      (HH:MM AM)

Date to begin this schedule  
Leave blank for current date/time

17  One Time       Simple Recurrence       Calendar Recurrence

Steps:

18. Choose how often in an hour you would like to receive the email notification. You can choose either every **hour** or every **half hour**.
19. Choose the **time(s)** you would like to receive the email notifications. (note that the morning call-out starts at 6:00 am and continues to call until the job is to start, and the evening call-outs start at 6:00 pm and stop at 9:00 pm. When you put a check mark in a time slot, you are choosing yes to be sent an email in that hour (or hour plus the half hour). Where there is not checkmark, there will not be an emailed report.
20. Choose the days of the week you would like the emailed reports. Most likely you do not want to choose every day (this means you will get emails on Saturdays and Sundays). You probably will choose to check off **Days of the Week** and then check the **Monday - Friday** option. If your program is never open on a day of the week (ie. No Fridays at your nursery school program) you can take the check mark off of the day that you do not want an emailed report.
21. If you are open for the full year, you can leave this with all months checked off. If your program closes for a month or more, you can take the check marks off of the months that you are closed so that you don't get email notifications while you are shutdown.
22. DO NOT pick any calendar days as that will be the only day that you get the report (i.e., if you choose 1, you will only get the report on the first day of the month. Leave this section blank.
23. DO NOT enter in an end date or end time. If you do, then you will not get the email notifications after the date you enter. Leave these fields blank.

One Time   
  Simple Recurrence   
  Calendar Recurrence

18 'Every: hour

19 Time(s):
 

12	1	2	3	4	5	6	7	8	9	10	11
AM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
PM	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

Day(s):
  Every Day   
  Days of the week
   
 Monday - Friday
   
 Sun  Mon  Tue  Wed  Thu  Fri  Sat

Calendar Date(s)
 

1	2	3	4	5	6	7	8	9	10	
<input type="checkbox"/>										
11	12	13	14	15	16	17	18	19	20	
<input type="checkbox"/>										
21	22	23	24	25	26	27	28	29	30	31
<input type="checkbox"/>										

 Last day of the Month

End Date/Time:
  
  
(MM/DD/YYYY) (HH:MM AM)

Month(s):
  All
   
 Jan  Feb  Mar  Apr  May  Jun
   
 Jul  Aug  Sep  Oct  Nov  Dec

One Time   
  Simple Recurrence   
  Calendar Recurrence

'Every: hour

Time(s):
 

12	1	2	3	4	5	6	7	8	9	10	11
AM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
PM	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

Day(s):
  Every Day   
  Days of the week
   
 Monday - Friday
   
 Sun  Mon  Tue  Wed  Thu  Fri  Sat

Calendar Date(s)
 

1	2	3	4	5	6	7	8	9	10	
<input type="checkbox"/>										
11	12	13	14	15	16	17	18	19	20	
<input type="checkbox"/>										
21	22	23	24	25	26	27	28	29	30	31
<input type="checkbox"/>										

 Last day of the Month

End Date/Time:
  
  
(MM/DD/YYYY) (HH:MM AM)

Month(s):
  All
   
 Jan  Feb  Mar  Apr  May  Jun
   
 Jul  Aug  Sep  Oct  Nov  Dec

Steps:

24. Enter in the email address(s) you would like the report to go to. If you are wanting the email to go to more than one person, you will need to put a “ ; ” in between the email addresses. Put in your **Subject** heading so that you will know what the email will contain. You can also enter a text message for the body of the email or leave it blank.
25. Choose the format you would like the report to come to you in. **PDF** will be a simple report that most computers and smartphones can handle. **DOCX** is a Word file, so you will need to have Word installed on your computer or smartphone. **CSV** is an internet type of text for converting data into spreadsheets, and **XLS** is Excel. You will need to have a version of Excel on your computer or smartphone.
26. Now **Save Schedule**.
27. You should then be taken to your list of Custom Reports. Under the folder Today's Jobs, you should see the report you just scheduled.
28. **View Report:** to see the details of what will be in the report.  
**Edit Report:** To change the details of what will be in the report.  
**Edit Schedule:** To change when and how you get the report emailed to you.  
**Unschedule:** To remove the schedule of when and how the report comes to you (if you want to eliminate that report coming to you).

11 12 13 14 15 16 17 18 19 20  
21 22 23 24 25 26 27 28 29 30 31

Last day of the Month

End Date/Time:    
(MM/DD/YYYY) (HH:MM AM)

Email Notification:  
\* To:  Use ", " to separate multiple addresses.  
24 Subject:   
Message Text:   
25 Report Attachment:  PDF  DOCX  CSV  XLS  
26 [Save Schedule](#) [Return to Saved Reports](#)

SmartFindExpress® Select Role

Home Administrator Reports

My Custom Reports

27 Today's Jobs  
Daily Absence Notification Report [View Report](#) [Edit Report](#) [Edit Schedule](#) [Unschedule](#)  
Delete Selected

28

To Delete the entire report and schedule, put a check mark in the box beside the name of the report and then click on **Delete Selected**.