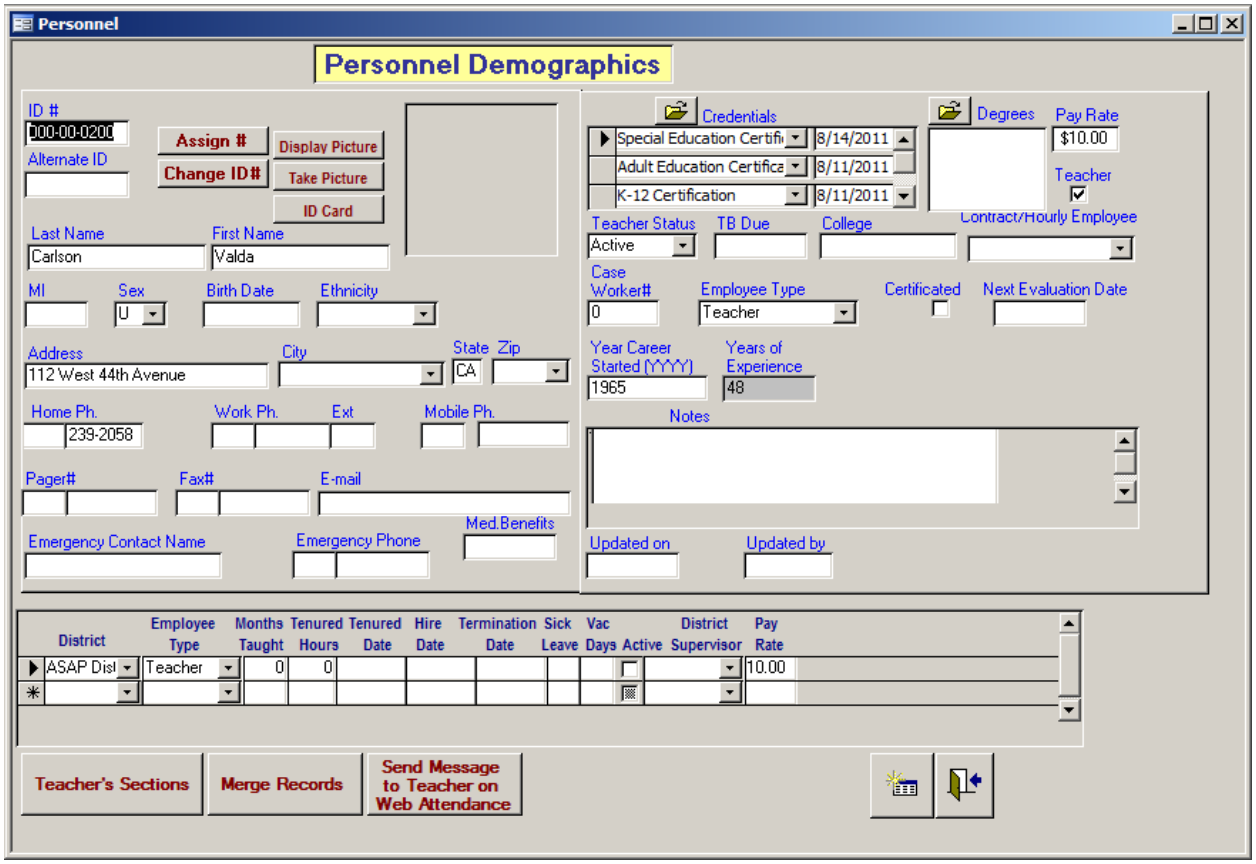
Setup – Personnel

1. Adding a Teacher (or other employee) to the Database



- Click on Setup, then on Personnel.
- From the Personnel Overview screen, click the "Add" icon at the bottom of the screen to open a blank demographic screen.
- Type in the teacher's ID Number in SSN format (no need for the dashes, the computer will add them). If you don't want to use a Social Security Number, click on the "Assign #" button, and the computer will assign the next available number. You can change this number at any time by using the "Change ID#" feature.
- When you press the Tab or Enter key, the cursor will jump to the Last Name field. Enter the last name, followed by the Tab or Enter key, then the first name and the middle initial, if 21 available. You can type the names in lower case – the computer will default to initial upper case.
- Continue filling in the fields, pressing the Tab or Enter key to move to the next field.
- Filling in the credentials field allows you to run a report to find all teachers with a similar credential for, say, substitute purposes. You can also run a report to determine which teachers need to renew their credentials on a given date.
- Click on the "Open" button above the "Credentials List." The credentials that you had previously entered in the Lookup Table will display in the pop-up window. Select the credential for this teacher, type in a renewal date, and click the "Add" button.

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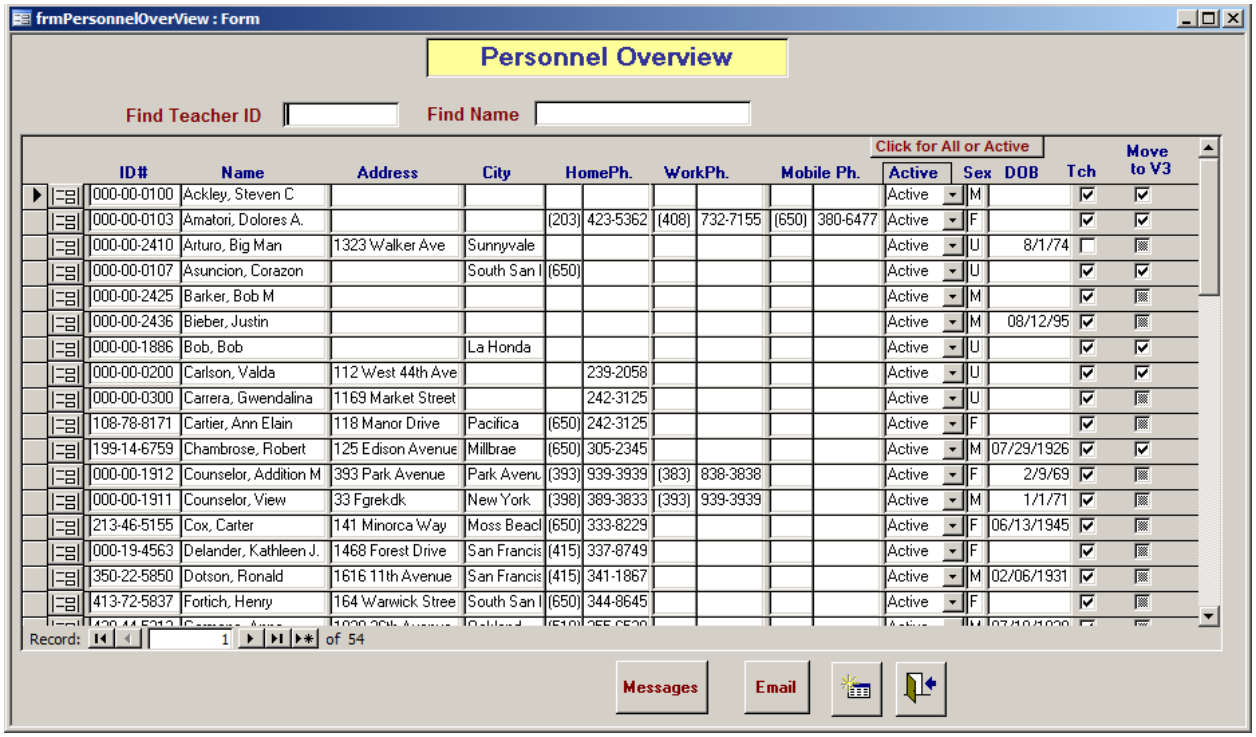
- Fill in the teacher's degree by clicking on "Degree List" and then double-click on the degree that should be displayed for this teacher.
- Tag the teacher as Active in the Status field. In the future, if the teacher leaves or is inactive for a period, you can change the Status field so that the teacher's name will not display on the Personnel Overview screen.* (See note under Personnel Overview below.)
- The information at the bottom of the screen can be filled in if a teacher teaches in more than one district and/or has a different pay rate, hire date, etc. in the different districts.
- When you have entered all the fields, click on the "open" icon to display an empty screen for a new record. Or you can scroll through the records you just entered using the video bar at the bottom of the screen.

2. Personnel Overview



- Click on Setup and then on Personnel.
- The Personnel Overview screen will appear with the information that you had entered for all the teachers.

Note: Make very sure that you select "Active" for all teachers whom you want to display on the Personnel Overview screen. If a teacher leaves in the future, she cannot be removed from the database because she has links to sections, students and attendance, but her name will not display on the Overview screen if she is not "active." If you do not see a name on the Overview screen that you know was entered, click on the "Click for All or Active" button at the top of the column to display only active or all teachers.

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While in the overview field, you have the ability to sort on any of the columns, either alphabetically or numerically.

Note: The following sorting instructions can be used anywhere in ASAP where there is columnar information.

- Click on a column heading, such as ID#, Name, etc. for an ascending sort; or
- Click anywhere in the column you wish to sort.
- Move your cursor to the top of the screen where the row of Access icons is located. (The cursor will change into an arrow.)
- When you click on one of the "sort" icons, , it will sort numeric columns from low to high or vice versa, and alpha columns from A-Z or Z-A. Any blank fields will show up on top if you sort from A-Z.

3. Retrieving a Personnel Record

- You can access any teacher's record from the Personnel Overview screen by clicking on the icon.
- If there are a large number of teacher records, use the "Find Teacher ID" or "Find Name" search fields at the top of the screen.
- Type just enough numbers, in the ID field, or letters, in the Name field, to identify the teacher.
- You can speed up the search process by sorting the records as outlined above. As soon as you have typed enough of the ID# or name to identify the teacher, press the Enter key twice.

Note: For teachers to show on the Overview screen, they must be tagged as "Active" on their demographic screens. You can look at either the active teachers or all teachers by clicking the "Click for All or Active" button.

4. Changing a Personnel Record

You can change any field in the teacher's demographic record except the ID number.

- Move the cursor to the field you wish to change, and type in the new information.
- The screen has two fields for showing when the record was updated and by whom.

5. Changing a Personnel ID Number

Click on the "Change ID Number" and type in the new one. The number will be changed everywhere in the system.

6. Merging Personnel Records

- If a duplicate record exists for the same teacher, you can merge the data by clicking on the "Merge Records" button at the bottom of the screen.
- Enter the password admin, then enter the ID number of the record to be merged. (After merging, the top record will remain and the bottom record will be deleted.)

7. Dropping a Teacher from the Database

Note: You can drop teachers only if they have never had classes assigned to them.

- From the Personnel Overview screen, click on the grey box at the far left of the teacher name you wish to delete.
- An arrow will appear and the box will turn darker.

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- Press the Delete key, and the teacher and all demographic information will be removed.

8. Printing a List of Teachers

- From the Personnel Overview screen, press "Print Scrn" on your keyboard
- Press the "Print" icon, or select "Print" from the File pull-down menu.

9. Viewing a Teacher's Classes

- Click on the button at the bottom of the teacher's screen titled 'Teacher's Sections."
- A list of the teacher's classes in the current Time Period will display.
- Use the "Select Time Period" field to see a list of classes in a previous Time Period, or
- Click on the "All Time Periods" button to see a list of all sections the teacher has ever taught.

10. Personnel Reports

There are several reports for teachers and their hours. From the Main Switchboard, click on Reports and then on Teachers.

11. E-mails to Teachers

Send out mass e-mails or e-mails to selected teachers.

- From Personnel Overview, click on the Email button at the bottom of the screen, then click on the Manage Templates button.
- Emails Setup screen shows a list of all the e-mails you have created. To view details, or to set up a new e-mail, click on the "Open" icon next to a description or an empty line.
- Enter the title of the e-mail (for future reference) and the subject.
- Type your message and the sender's name and title. To choose the recipients, go back to the e-mail screen.
- If you do not want the teachers to see a list of all the recipients, address the e-mail to yourself and click on the BCC (blind carbon copy) button.
- From the drop-down menu, choose either All Teachers or Active Teachers. You can also choose only teachers with e-mail addresses by clicking on the button at the bottom of the screen.
- Click in the "Pick" boxes to select the teachers and then click the "Select Picked" button (or select all recipients who have e-mail addresses).
- At the email screen, click on the "Send" button. Please note the message at the top of the screen: make sure your computer is set up for sending mass emails
- If you want to save the message under another title so that you can make changes, click the button titled "Save Current Input as New Template".
- You can erase your message without affecting the rest of the set-up, by clicking the button titled "Reset Email".