

# Aesop Kiosk Integration

3/17/14

### **Aesop/Kiosk Integration**

#### **Overview of Aesop/Kiosk Integration Process**

1. If district contacts their ITC to begin the integration process, the ITC will ask the district to contact Aesop to begin the integration process. The ITC can share talking points with the district but the initial process must begin with Aesop.

#### **Talking Points:**

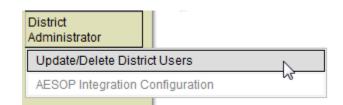
- Employees can create absences through the Kiosk web, Aesop web, or Aesop phone giving the employee a comprehensive entry offering.
- Transfer leave data and sub time worked directly to USPS in one process, rather than from multiple sources.
- Seamlessly transfer all demographic data from Kiosk to Aesop, eliminating double entry.
- Eliminating the double entry requirement, this is dependent on an employee to accurately enter requests in both software packages.
- 2. Aesop will work with the district to configure the Aesop functionality and also have the district complete the Web Services Integration Agreement, which allows data to be transferred between the two software packages.
- 3. Once configuration is complete for Aesop, Aesop will contact NCOCC with the district template configuration information.
- 4. NCOCC will configure templates within Kiosk for District and run initial sync.
- 5. The ITC that services the district will work with that district to help them with updating the Aesop information that was not matched in Kiosk. Once the information is updated in Aesop they will assist district in running the sync process again to determine what information still needs to be updated.

## The procedures below will help the ITC and District with the cleanup of data in Kiosk and Aesop.

#### Initial Clean Up of Staff

District Staff need to run an employee list to ensure that USPS and Kiosk employee data is accurate and matches. Only active employees should be in Kiosk. Employees that are no longer active can be deleted from Kiosk.

- 1. Click on District Administrators
- 2. Click Update/Delete Users
- 3. Locate employee
- 4. Click delete





Deleting the employee from Kiosk will take away that employee's access to see previous pay slips and W2s.

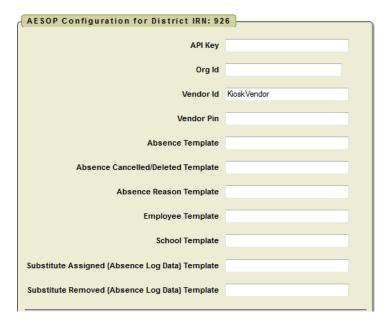
If a district is currently using Aesop the district staff will also need to run an employee list from Aesop to verify that only active employees are listed.

NOTE: The phone number that the employee will be using to access the call functionality of Aesop needs to be entered into the phone number field into USPS. When the initial load of staff is done from Kiosk to Aesop that information is passed to Aesop. If the phone number field is blank in USPS it will be blank in Kiosk, which will result in the employee Phone Login Id being blank in Aesop.

When the Enable Aesop Integration is set to Yes, when a user is deleted in Kiosk they will automatically be de-activated in Aesop. When a deleted employee is activated again in Kiosk they will automatically be made active in Aesop.

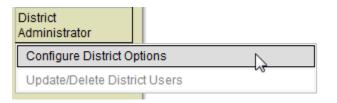
Once employee data is verified and accurate the district will verify data is being synced.

NOTE: NCOCC will complete the template information in the Aesop Configuration screen within Kiosk for the each district that wants to integrate Aesop and Kiosk.

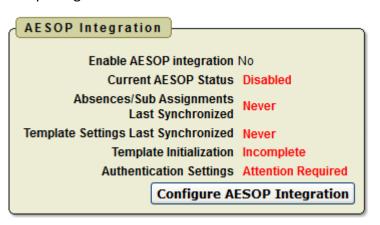


#### In Kiosk:

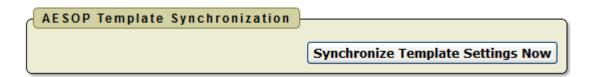
- 1. Click on District Administrator
- 2. Click on Configure District Options



- 3. Under Aesop Integration click Configure Aesop Integration
- 4. Template information will already be updated



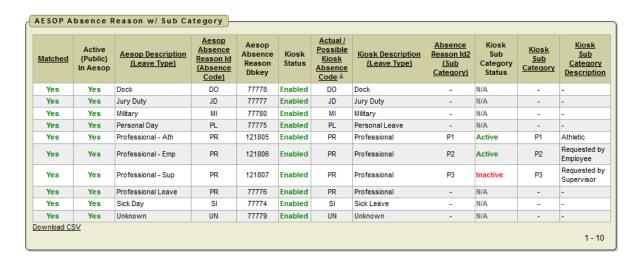
Click Synchronize Template Settings Now



6. All Matches and Non Matches will be displayed in the Mappings section.

Mappings				
Absence Reasons Total: 7	Matched: 7	View		
Employees Total: 152	Matched: 152	View	Active Employees not Sync'd	
School Buildings Total: 4	Matched: 4	View		
Use Selections below to Filter Results:				
Matched Active In Aesop All ▼ All ▼				

#### Click on View to see matches/non-matches in Absence Reasons.



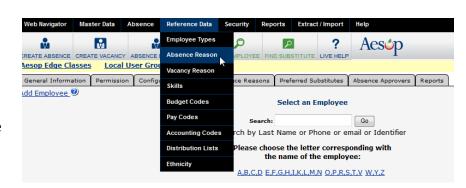
NOTE: As part of the integration process NCOCC and Aesop are configuring this for each district. For Absence Reasons that have Sub Categories we work with the district to configure Kiosk and Aesop with the correct two-letter code used in USPS.

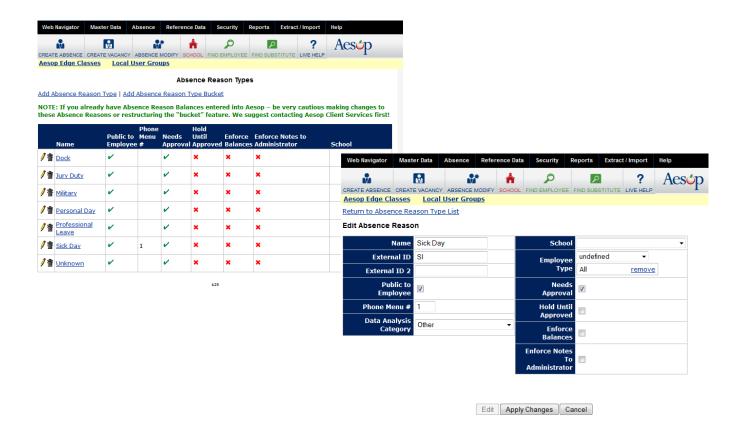
There can only be one absence type in Aesop assigned to one absence reason in Kiosk. If a district uses sub categories in Kiosk those categories will still fall under one absence type in Aesop.

For non matches in the absence reasons a district staff person with access will need to log into Aesop and Update Leave Types.

#### In Aesop:

- 1. Click on Reference Data
- 2. Click on Absence Reason
- 3. Click on pencil to Edit
- Change External ID to be the correct employee id from Kiosk
- 5. Click Apply Changes

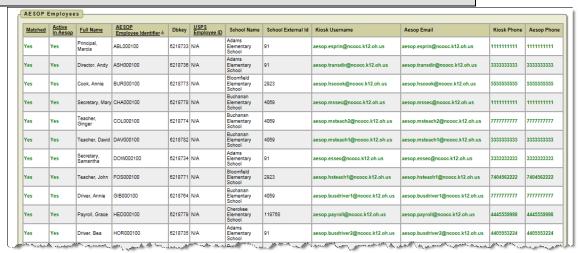




Whatever absences types that you see for the Aesop web interface is available for calling functionality also.

If an absence type is set to not public in Aesop when a leave request is done in Kiosk for that absence reason the request will not be sent to Aesop.

#### In Kiosk click on View to see matches/non-matches in Employees.

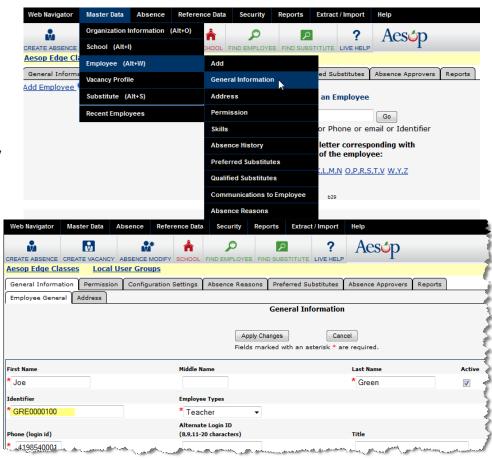


USPS will be the source for data for Kiosk and Aesop. Any changes to phone or email addresses need to be made within USPS. Kiosk will be updated with those changes and then pass the changes to Aesop.

For non matches in the employees a district staff person with access will need to log into Aesop and Update Employee IDs.

#### In Aesop:

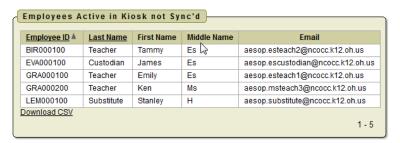
- 1. Click on Master Data
- 2. Click on Employee
- Click on General Information
- 4. Search for Employee by last name
- 5. Click Edit
- Modify identifier with correct employee id
- 7. Click Apply Changes



Important to note that if an employee id changes in USPS it will not only affect Kiosk but will affect Aesop and cause the employee not to be able to login to Kiosk or pass leave requests from Aesop.

Any employees that were not loaded automatically into Aesop can be view by clicking on the Active Employees not Sync'd.

This will give you a list of employees that can be verified and corrected either in Kiosk or Aesop.



#### Click on View to see

matches/non-matches in School Buildings.

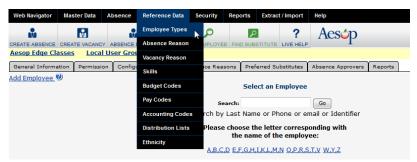
School buildings should match. This is part of the configuration process done by Aesop and NCOCC.



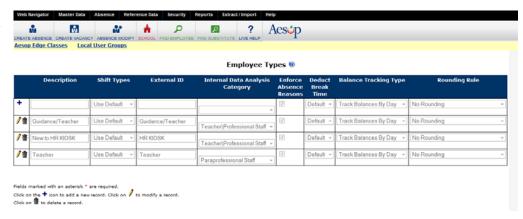
Once everything matches the following configuration needs to be done:

In order for new employee data to be automatically sent to Aesop the Employee Leave Type in Aesop must be created.

- 1. Click on Reference Data
- 2. Click on Employee Type



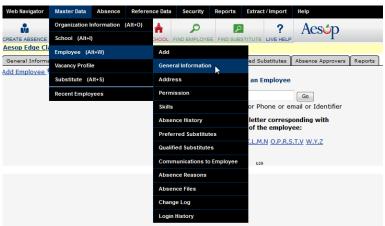
- 3. Click on +
- 4. Enter Description of New to HR KIOSK
- 5. Enter External ID of **HR KIOSK**



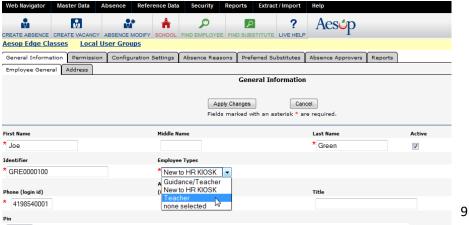
- 6. Select Teacher/Professional in the Internal Data Analysis Category
- 7. Click green check mark to add leave type.

Once the syncing of staff is complete any new staff added from Kiosk into Aesop that will be using Aesop for substitute replacement will need to have a correct Employee Type. District staff with the appropriate Aesop access will need to go into Aesop and change the Employee Type to the correct type.

- 1. Click on Master Data
- 2. Click on Employee
- 3. Click on General Information
- 4. Search for Employee by last name
- 5. Click Edit



- 6. Change Employee Types
- 7. Click Apply Changes



NOTE: When a user is deleted in Kiosk they will automatically be de-activated in Aesop. When a deleted employee is activated again in Kiosk they will automatically be made active in Aesop.

#### **Substitute Assignments by Appointment Type**

All leave requests will flow from Kiosk to Aesop but a district can configure Kiosk so that Aesop will find replacements based on Appointment Type. If a district chooses to have Aesop find replacements for just Certificated staff they can check the box and then any leave request created by a Certificated staff will be sent to Aesop that a replacement is needed. If a district wants to still use the Sub Coordinator functionality within Kiosk for their Classified staff if they uncheck the box leave requests will still flow to Aesop but no replacement will be found.

Aesop to handle Substitute Assignment Classified  for Appointment Type?  Certificated

#### Determining when Leave Requests will be sent to Aesop

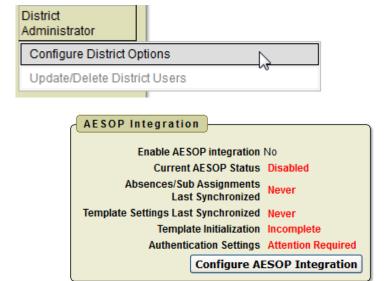
All leave requests will flow from Kiosk to Aesop but a district can configure at what point the leave request will flow to Aesop. If a district puts a check in the box next to the leave type any leave requests done for that leave type will be sent when the employee clicks on the submit when creating the leave request. If you do not check the box next to the leave requests any leave requests done for that leave type will be sent to Aesop on final approval.

	☑ Dock ☑ Jury Duty
All Leave Requests for the selected Leave Type(s) will be sent to Aesop when INITIATED.	Military
will be selle to Acsop when initiATED.	✓ Personal Leave
NOTE: A request for a Leave Type that is not selected	✓ Professional
will be sent to Aesop upon "Final Approval".	Sick Leave
	Unknown
	Vacation Leave

Once everything is verified for staff and sync is working correctly district can configure how often leave requests are sent and received from Kiosk to Aesop.

#### In Kiosk:

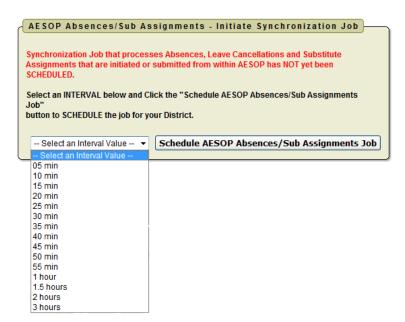
- 1. Click on District Administrator
- 2. Click on Edit/Update District
- Under Aesop Integration click Configure Aesop Integration



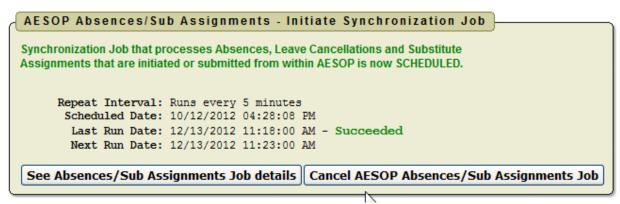
#### **Aesop Absence/Sub Assignments**

This will set the interval for how often leave requests are sent from Aesop to Kiosk.

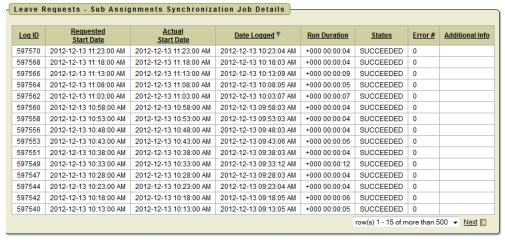
- Click on the drop down arrow to select how often requests are sent.
- Click Schedule
   AESOP/Absences/Sub
   Assignments Job



Once set Kiosk will display the Repeat Interval, Last and Next Run dates. Cancel will cancel sync of leave requests and the sync can be rescheduled to a different interval.



The See Absences/Sub Assignments Job Details shows a list of dates and times the sync was run and if there were any errors.



Close Window

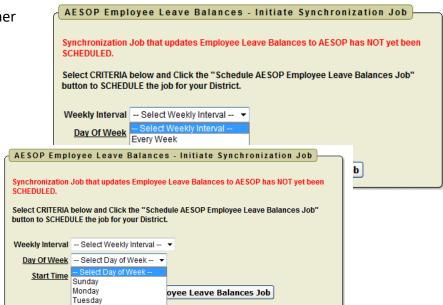
#### **Aesop Employee Leave Balances**

This will set the interval for how often leave balances are sent from Kiosk to Aesop.

Wednesday

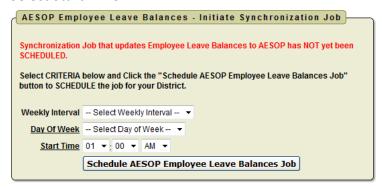
Thursday Friday Saturday

Select Weekly Interval (either Weekly or Biweekly)



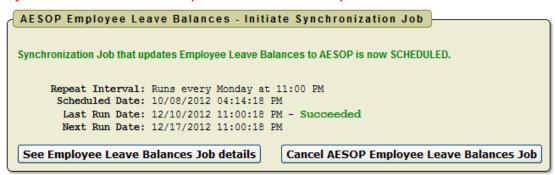
2. Select Day of Week

#### 3. Select Start Time



#### 4. Click Apply Changes

Once set Kiosk will display the Repeat Interval, Last and Next Run dates. Cancel will cancel sync of leave balances and allow you to reschedule the sync.



The See Employee Leave Balances Job Details shows a list of dates and times the sync was run and if there were any errors.

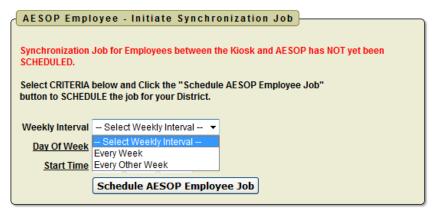


Close Window

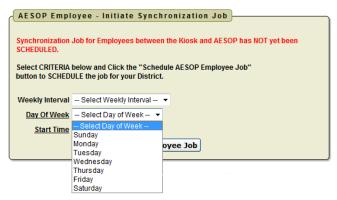
#### **Aesop Employee**

This will set the interval for how often employee job information is sent from Kiosk to Aesop.

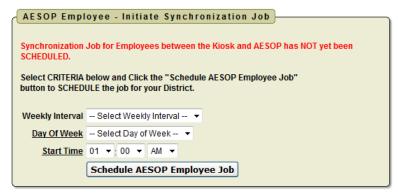
 Select Weekly Interval (either Weekly or Biweekly)



2. Select Day of Week

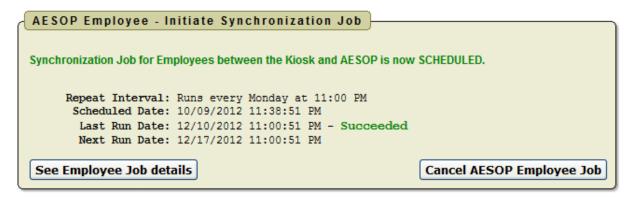


3. Select Start Time



4. Click Schedule AESOP Employee Job

Once set Kiosk will display the Repeat Interval, Last and Next Run dates. Cancel will cancel sync of employee job information and allow you to reschedule the sync.



The See Employee Job Details shows a list of dates and times the sync was run and if there were any errors.



Once buildings and absence types are matching, set the Enable Aesop Integration flag to yes.

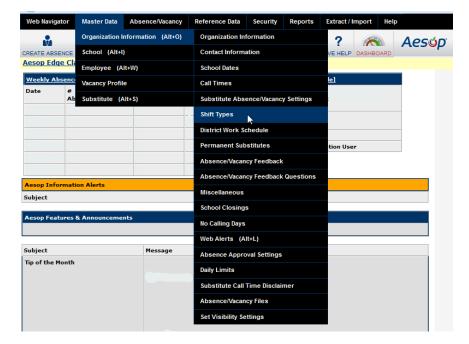


The Aesop Employee Integration Sync Job can be used to load staff that is registered in Kiosk but not loaded into AESOP. When this job runs it will load the new staff into AESOP as well as any users that have not been caught by de-activating them in Kiosk.

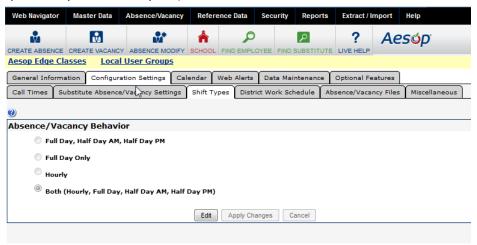
#### **Additional Configuration**

#### To accept hours from Kiosk into Aesop

- 1. Click on Master Data
- 2. Click on Organization Information
- 3. Click on Shift Types



- 4. Select Both (Hourly, Full Day, Half Day AM, Half Day PM)
- 5. Click Apply Changes



#### **ADDITIONAL NOTES**

- Aesop and Kiosk must match with employee phone numbers, email addresses, and building IRNs. If Aesop has the most current then USPS must be updated with the current information.
   Once USPS is updated then Kiosk will be updated as well. For the integration process to work correctly they need to match because Aesop uses the phone number as the employee pin so USPS/Kiosk needs to have that same number to match on to verify the correct employee.
- USPS will be the source for data for Kiosk and Aesop. Any changes to phone or email addresses need to be made within USPS. Kiosk will be updated with those changes and then pass the changes to Aesop.
- When adding a new staff, you will want to create them in USPS and then register them in Kiosk.
   Once added in Kiosk, the staff information will be sent to Aesop with an employee type of New to HR Kiosk. The district will need to go into Aesop to update the employee type information.
- Verify that the district has reviewed employees in Kiosk and Aesop. Employees that are active in Aesop but not active in Kiosk will be set to inactive in Aesop when the syncing of data begins. If an employee is made active again in Kiosk the information will be sent to Aesop to activate them in Aesop.
- Districts will want to verify that they have breaks added in Aesop for their staff.
- Districts have the ability to select when leave requests will be sent to Aesop when the request is
  created in Kiosk. Leave requests can be sent to Aesop at the time the request is initiated or
  upon final approval of the request.
- A leave request done in Kiosk needs to be done for one leave type; you cannot select multiple leave types on a request. When entering a leave request in Aesop an employee must only select one leave type at a time. This will allow for the information to be sent correctly to Kiosk.
- If you have secured a sub and do not need Aesop to contact a substitute for a leave request, when creating the leave request in Kiosk uncheck the Sub Needed box.
- Districts have the ability to determine how often Kiosk checks Aesop for new leave requests. The minimum amount is every 5 minutes.
- Approving the leaves in Aesop will NOT approve them in the Kiosk. Districts have the ability to
  have the Leave Approval process turned off in Aesop. To allow districts to only approve in one
  place the Leave Approval process should be turned off in Aesop. This will allow all approvals to

be done in Kiosk.

- When a district has a calamity day, the day can be closed in Aesop. Aesop will ask for confirmation that requests for that day need to be cancelled. Once it is confirmed to cancel requests those requests will be cancelled in Kiosk.
- Staff can update a request in Aesop to cancel one day in a multiple day request. That updated information will be sent to Kiosk and the request will be updated.
- Cancellations or rejections that are done in Kiosk are sent to Aesop to cancel the substitute.
- Any notes that are put into the notes to substitute field on a request within Aesop will be put in
  the comments field in the leave request in Kiosk. Notes put into the administrator field in Aesop
  are put into the reason field on the leave request in Kiosk.
- Default start and end times must be set in Aesop. Kiosk will look to Aesop to verify what the start and end times when a leave request is created. Staff will not be able to edit start and end times in Kiosk.
- With the integration enabled, staff will no longer have the ability to update their sick leave
  requests in Kiosk prior to first level approval. Once the leave request is sent to Aesop a
  confirmation number is generated and sent to Kiosk. Once the confirmation number is received
  the request cannot be updated. The staff member will need to cancel the request in Kiosk and
  create a new leave request.