

# Aesop Kiosk Integration

# TABLE OF CONTENTS

TABLE OF CONTENTS	2
AESOP/KIOSK INTEGRATION OVERVIEW	3
INITIAL CONFIGURATION IN KIOSK	4
UPDATING ABSENCE REASONS	6
STAFF CLEAN UP	9
SCHOOL BUILDING CLEAN UP	14
ADDITIONAL CONFIGURATION OPTIONS	15
CONFIGURE USERS TO SYNC WITH AESOP	15
SUBSTITUTE ASSIGNMENTS BY APPOINTMENT TYPE	17
DETERMINING WHEN LEAVE REQUESTS WILL SENT TO AESOP	17
GO LIVE WITH INTEGRTION REMINDERS	18
TURN ON INTEGRATION	20
TROUBLESHOOTING	25

# **Aesop/Kiosk Integration Overview**

# **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:**

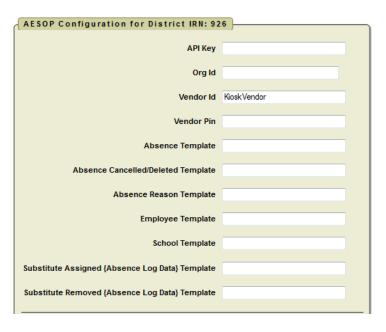
- Employees can create absences through the Kiosk web, Aesop web, or Aesop phone giving the employee a comprehensive entry offering.
- Transfer leave data and sub time worked directly to USPS in one process, rather than from multiple sources.
- Seamlessly transfer all demographic data from Kiosk to Aesop, 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 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.

# **Initial Configuration**

Once Aesop has the configuration completed a list of template ID numbers, district Org ID and

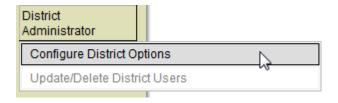
API Key will be sent to NCOCC. The template numbers, Org ID and API Key will need to be entered into the Aesop Configuration screen.

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

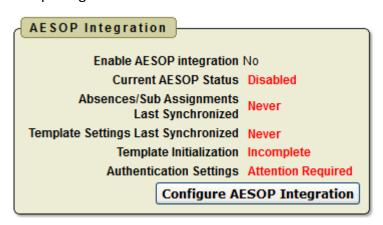


#### In Kiosk:

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



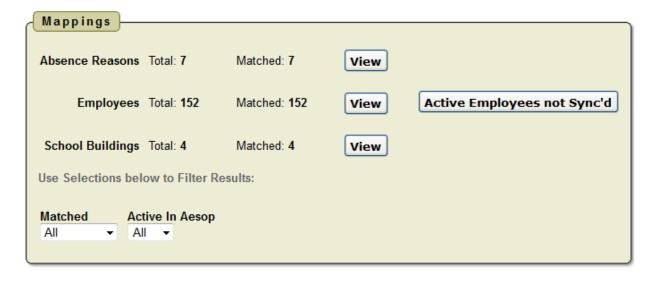
- 3. Under Aesop Integration click Configure Aesop Integration
- Template information will already be updated



5. Click Synchronize Template Settings Now



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



# **Updating Absence Reasons**

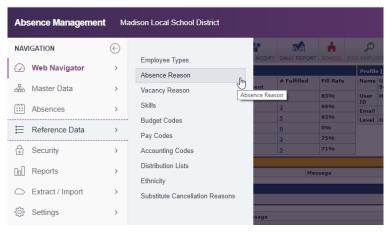
Absence reasons must match between Aesop and Kiosk. Which means there can only be one absence type in Aesop assigned to one absence reason in Kiosk. For Absence Reasons that have Sub Categories we work with the district to configure Kiosk and Aesop with the correct two-letter code used in USPS.

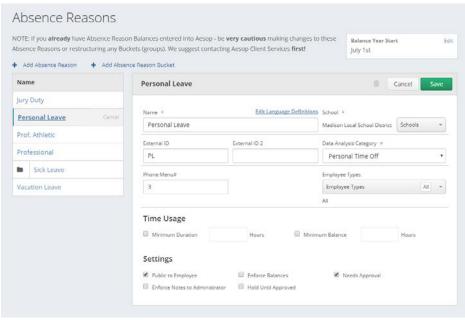
For non-matches in the absence reasons a district staff person with access will need to log into Aesop and Update Leave Types.

<u>Matched</u>	Active {Public} In Aesop	Aesop Description {Leave Type}	Aesop Absence Reason Id {Absence Code}	Aesop Absence Reason Dbkey	Kiosk Status	Actual / Possible Kiosk Absence Code	Kiosk Description {Leave Type}	Absence Reason Id2 {Sub Category}	Kiosk Sub Category Status	Kiosk Sub Category	Kiosk Sub Categor Description
Yes	Yes	Dock	DO	77778	Enabled	DO	Dock	-	N/A	-	-
Yes	Yes	Jury Duty	JD	77777	Enabled	JD	Jury Duty	-	N/A	-	-
Yes	Yes	Military	MI	77780	Enabled	MI	Military	-	N/A	-	-
Yes	Yes	Personal Day	PL	77775	Enabled	PL	Personal Leave	-	N/A	-	-
Yes	Yes	Professional - Ath	PR	121805	Enabled	PR	Professional	P1	Active	P1	Athletic
Yes	Yes	Professional - Emp	PR	121806	Enabled	PR	Professional	P2	Active	P2	Requested I Employee
Yes	Yes	Professional - Sup	PR	121807	Enabled	PR	Professional	P3	Inactive	P3	Requested Supervisor
Yes	Yes	Professional Leave	PR	77776	Enabled	PR	Professional	-	N/A	-	-
Yes	Yes	Sick Day	SI	77774	Enabled	SI	Sick Leave	-	N/A	-	-
Yes	Yes	Unknown	UN	77779	Enabled	UN	Unknown	-	N/A	-	-

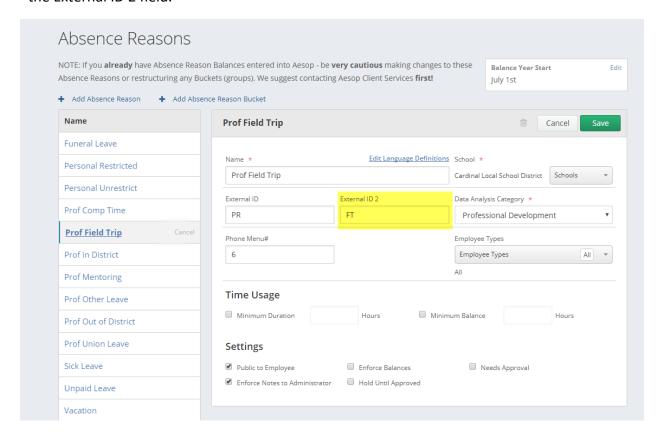
# In Aesop:

- 1. Click on Reference Data
- 2. Click on Absence Reason
- 3. Click on Absence Reason name to Edit
- 4. Change External ID to be the correct 2-letter absence code from USPS/Kiosk
- 5. Click Save





If the leave type in Kiosk has a sub category you need to enter the 2-digit value from Kiosk into the External ID 2 field.



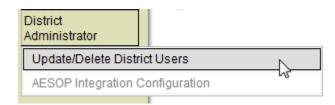
If an absence type is set to not public in Aesop when a leave request is done in Kiosk for that absence reason the request will not be sent to Aesop.

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

#### **Staff Clean Up**

District staff will want 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





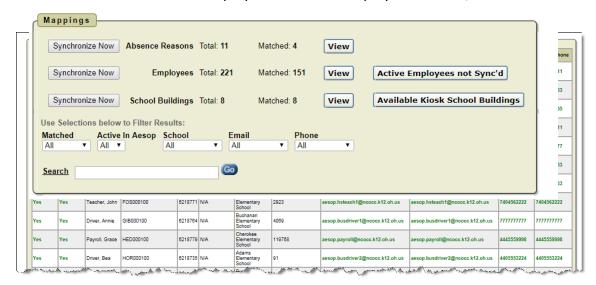
Deleting the employee from Kiosk will take away that employee's access to see previous pay slips and W2s.

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 not being able to enter leave requests.

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.

In Kiosk click on View on the Employee row to see employee matches/non-matches.

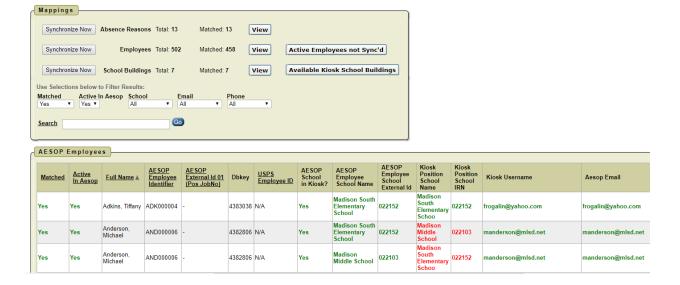


Data in green is a match, data in red is not a match.

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 when the employee logs into Kiosk or the Load Positions for All Registered Users has been clicked on the district configuration screen. Any Aesop data that is not correct will need to be changed in Aesop.

The USPS employee ID must be the Aesop Employee ID. If the ID does not match the employee will not sync.

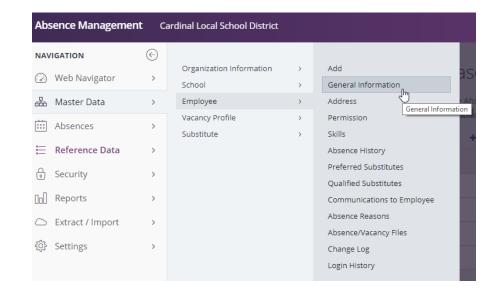
To isolate the data that needs to be cleaned up you have Filter options of phone, email and building information.



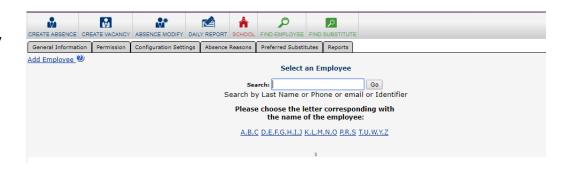
For non-matches in the employees' information, a district staff person with access will need to log into Aesop and update incorrect information.

# In Aesop:

- 1. Click on Master Data
- 2. Click on Employee
- Click on General Information



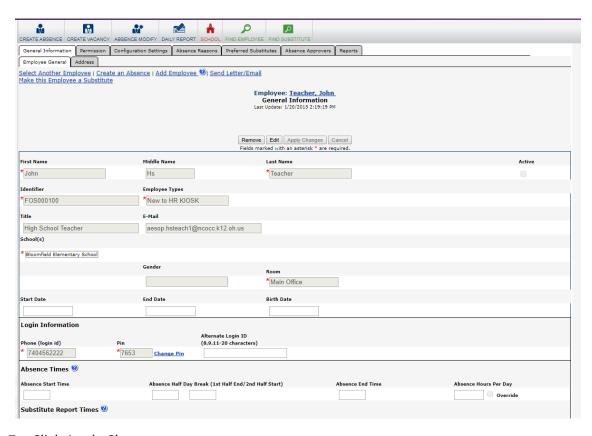
 Search for Employee by last name or click on a letter of the alphabet.



Click on the employee's name to view their information.



# 6. Click on Edit to modify information



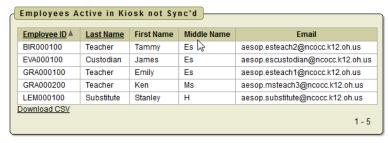
# 7. Click Apply Changes

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 to and 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.



Clicking the the employee ID next to an employee will display the

Close Window

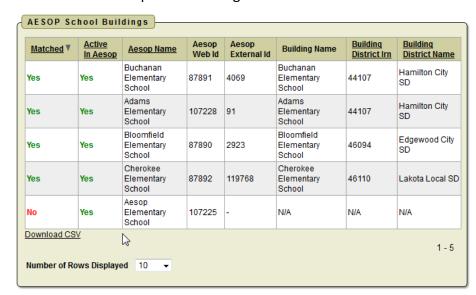
data that is being synced between Aesop and Kiosk. This will allow you to see which data is missing like a phone number or supervisor ID.



# **School Building Clean Up**

Buildings are matched between Aesop and Kiosk based on the building IRN. Some districts like to use Bus Garage, Transportation, Maintenance in Aesop. These are more of a position type instead of a building but they can still be used in Aesop. The building would need to be

assigned to a building IRN. For example, transportation would be assigned the district IRN in Aesop so it matches Kiosk. This is part of the configuration process done by Aesop and NCOCC.



# **Additional Configuration Options**

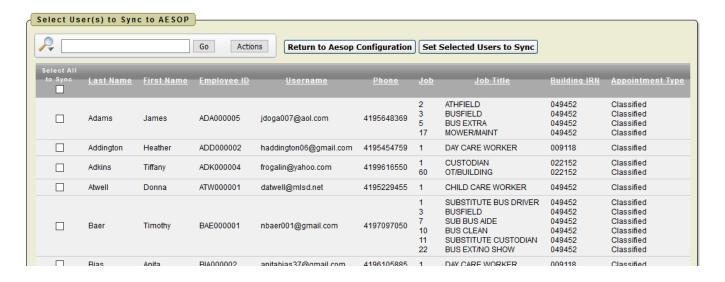
# **Configure Users to Sync to Aesop**

For those who have staff that will not be needing substitute replacement, districts have the option to decide which staff need to be synced with Kiosk and Aesop.

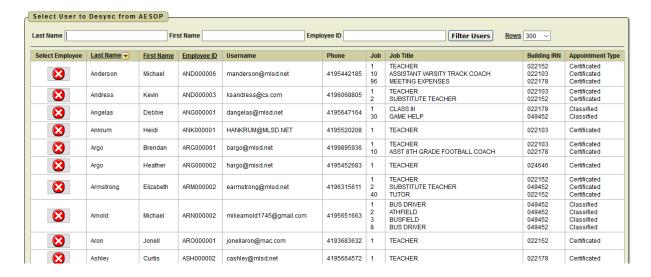
1. Click on Configure Users to Sync to Aesop.



 The first list will display staff who are currently not syncing and need to be synced with Aesop. Click on the checkbox next to the staff person's name and click Set Selected Users to Sync.



3. The second list will display staff who are currently syncing. If the district has staff that they no longer need to have synced with Aesop they can click the red X next to the employee's name under the Select User to Desync from Aesop. This will allow the employee to create leave requests in Kiosk but the leave request will not flow to Aesop.



4. When you click on the red X you will receive the confirmation that this employee will no longer be sync'd.

When the employee logs into Kiosk they will see the message that they are not integrated with Aesop.

Aesop Integration Y

Aesop Submit Enabled Your Employee ID is not configured with AESOP.



If you select a staff person to sync or they are de-sync'd, Kiosk will be updated immediately. The process will try to update Aesop too, but if there is an issue and it fails to update Aesop the nightly job that runs will try to update the employee again.

#### **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.

	☐ Classified ☑ Certificated

# Determining when Leave Requests will be sent to Aesop

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

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

#### **Go Live With Integration Reminders**

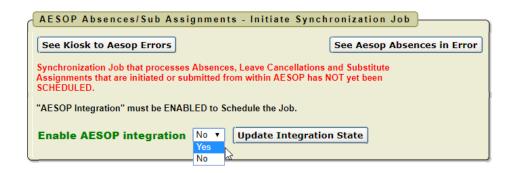
Before going live with the integration review the final topics below with your district.

- Aesop and Kiosk must match with employee phone numbers, email addresses, and building IRNs. If Aesop has the most current information, 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 and Aesop. Kiosk will be updated with those when the employee
  logs into Kiosk.
- When adding a new staff, you will want to create them in USPS. Verify that the employee has building IRN, email address, phone number supervisor id and active job in USPS. Once this has been verified the employee can be registered in Kiosk. Once added in Kiosk, a nightly job will run and 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.
- Districts will want to verify that they have breaks added in Aesop for their staff.
- Districts can 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 can determine how often Kiosk checks Aesop for new leave requests. The minimum amount is every 5 minutes.
- Once the integration is live leave approval will only be done within Kiosk. The approval process will be turned off in Aesop.

- When a district has a calamity day, they can close the day 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.
- Districts need to be careful when creating closed days on their Aesop calendar. They will want to close the days based on employee leave types.
- 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 once the request has been approved in Kiosk.
- 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.
- Attachments that are added to a leave request in Kiosk will not be sent to Aesop.
- 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 can 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.
- The maximum number of days on a leave request is 9 days. The Aesop web service can only transmit a maximum of 9 days on a request.
- Make sure all supervisors have current leave requests approved. Only new requests that are created after the integration is live will flow to Aesop.

# **Turn On Integration**

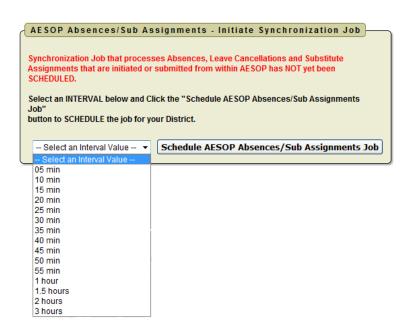
- 1. Set the Enable Aesop Integration to Yes
- Click on Update Integration State



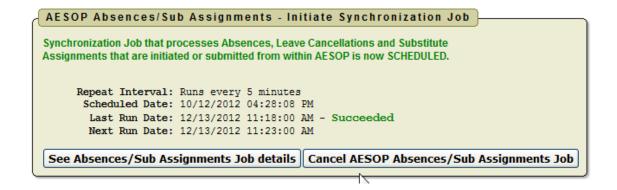
#### **Aesop Absence/Sub Assignments**

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

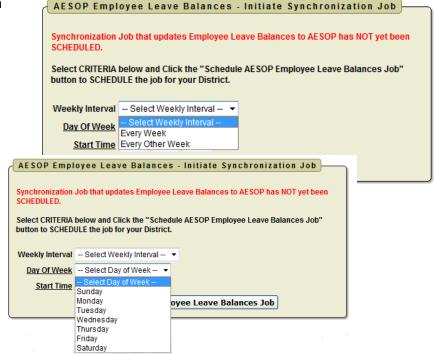
#### **Aesop Employee Leave Balances**

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

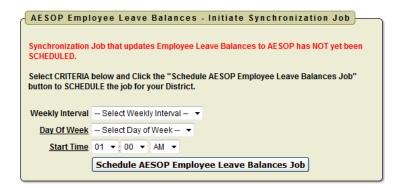
Select Weekly Interval (either Weekly or Biweekly)

It is helpful to run this job once a week.

2. Select Day of Week

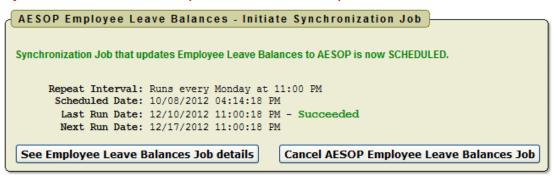


#### 3. Select Start Time



#### 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** 

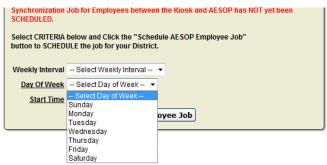
#### Aesop Employee – Initiate Synchronization Job

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

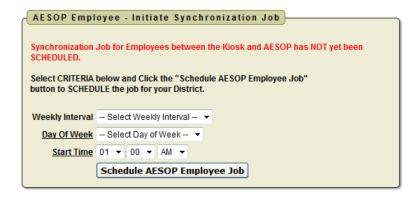
 Set Weekly Interval to Every Day.



2. Select Day of Week



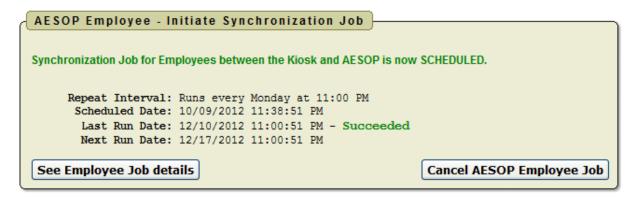
3. Select Start Time



4. Click Schedule AESOP Employee Job

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.

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.

Employees Synchronization Job Details								
<u>Log ID</u>	Requested Start Date	Actual Start Date	Date Logged ▼	Run Duration	<u>Status</u>	Error#	Additional Info	
593129	2012-12-10 11:00:51 PM	2012-12-10 11:00:51 PM	2012-12-10 10:00:52 PM	+000 00:00:00	SUCCEEDED	0		
583839	2012-12-03 11:00:51 PM	2012-12-03 11:00:51 PM	2012-12-03 10:00:52 PM	+000 00:00:00	SUCCEEDED	0		
577018	2012-11-26 11:00:51 PM	2012-11-26 11:00:51 PM	2012-11-26 10:00:52 PM	+000 00:00:00	SUCCEEDED	0		
574140	2012-11-19 11:00:51 PM	2012-11-19 11:00:51 PM	2012-11-19 10:00:52 PM	+000 00:00:00	SUCCEEDED	0		
1-4								

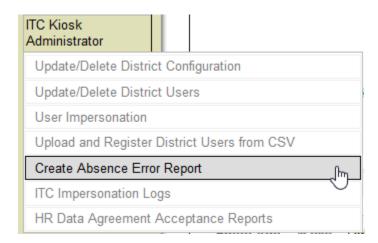
Close Window

# **Troubleshooting**

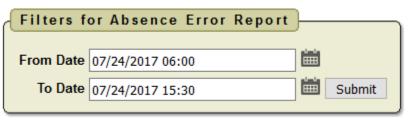
An employee entered a request and when they clicked submit they received a User Defined Error.

The first step in troubleshooting this is to determine what the real error is.

- 1. Click on ITC Kiosk Administrator
- 2. Click on Create Absence Error Report



- 3. Click on the calendar icon to select a date and time for the report. You can only view 1 day at a time in this log file.
- 4. Click submit when from and to dates have been entered.





The log will show the date, time username and error.



To find the error look for the username of the employee who is receiving the error. The actual error will be in the Extra column.

#### Common things to look for:

Error creating your AESOP request. Employee configured to NOT need substitutes in AESOP. Please un-check Substitute Needed checkbox and try again. The error is saying the employee has been flagged on the Aesop side as not needing a sub

How to fix – Login to Aesop and under Master Data > Employee> General Information > Permissions make sure the employee is marked as either Always requires a Substitute or Can Decide if a Substitute is Required.

# The following absence days in this absence conflict with already existing absence days

How to fix – This error is saying there is already a request in Aesop for this employee for the date(s) entered. The employee or Aesop administrator needs to cancel the request on the Aesop side and it needs to be entered again.

\*\*\* Parameters \*\*\* p\_request\_number: 3663691 p\_default\_starttime: 08:00 AM p\_default\_endtime: 04:00 PM p\_hoursinworkday: 7.25 p\_sub\_comments: p\_validate\_only: N message: Error creating your AESOP request. Unknown technical error.

How to fix – Verify the start and end times on the request are accurate especially if the request is a half day request. When an employee puts in a request for a half day it will display in Kiosk what the accurate times are for a half day according to what has been entered in Aesop. The error above has displayed when the correct times where not entered.

Also, check the hours in the work day for the employee if the request is a full day request to make sure total hours match with the hours in the work day from Aesop.