

Chapter 12

Working with Check-In History

With the Check-In feature, your district can maintain a historical database of your driver's check-in record. This allows you to research the contents of this database in a great many ways. One the most obvious ways to use this archival database is to ask the question, "How many times did driver x come to work late?" In addition to this, some other useful questions you may ask this database are:

- Are drivers late more in the morning than in the afternoon?
- How many times have drivers reported to work late this year?
- How many times has a driver reported to work critically late this year?

Once you have the capability of asking questions like these, you will be surprised how many other useful questions regarding driver check-in will surface. With the T.O.M. Employee Management Check-In Feature it is just a click of mouse away!

You can then use the Check-In History report to research this database. Over time, the Check-In History database can become quite large. The Check-In Feature has a purge routine that allows you to, every now and then, remove older check-in records from this database. This topic is discussed later in this chapter.

The following topics will help you learn about:

- Searching Archived Check-In Records
- Generating and Printing Check-In History Reports
- Purging Records from Your Check-In History Database

Searching Archived Check-In Records

If you click in the Save Current Information in the Archive File checkbox when you create a new shift, the Employee Check-In software archives the data from the shift into the Check-In History Database. You can then search that data in this archive database for viewing or reporting purposes.

For example, you can view the check-in records for a particular employee, or you can be more specific and search for the check-in records for a particular employee when he was late a specified number of minutes.

To search archived check-in records:

1. Select File>Report in the Employee Check-In Status screen (Figure 12-1).

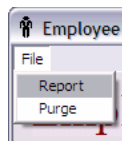


Figure 12-1. Accessing the Check-In History Report screen

The Employee Check-In feature displays the Check-In History screen (Figure 12-2).



2. Select information from the pull-down menus. For a description of all the search options on this screen, see the Search Tab section next in this chapter.

NOTE: To retrieve *ALL* archived check-in records, leave all the fields blank on this screen and click the *Find Now* button.

3. Click the Find Now button to search check-in history records.

Figure 12-2 shows the results of searching check-in records for the month of September for all employees on the AM shift who were five or more minutes late.

The screenshot shows a window titled "Check-In History Report" with a subtitle "5 Record(s) Found". It features a search interface with the following fields and controls:

- Search** and **Sort** tabs.
- Employee:** A drop-down menu.
- Date Range:** From: 9/1/2004, To: 9/30/2004.
- Time Range:** From: (empty), To: (empty), with clock icons.
- All Check-Ins where # of minutes late >=:** 5.
- Shift:** AM.
- Batch ID:** 0.
- Report to Print:** 1 Line Check-In History Report.

Below the search fields is a table with the following data:

#	Last Name	First Name	Trans. Date / Time	Time Scheduled	Time In	Minutes Late	Ver
513	Rynhesdt	Sharon	9/17/2004 6:16:31 ...	6:00 AM		18	91
562	Nilcun	Dawn	9/17/2004 6:16:31 ...	6:00 AM		19	0
565	Tesdyff	Steve	9/17/2004 6:16:31 ...	6:00 AM		19	46
290	Gessitun	Alexandra(Al...	9/20/2004 1:55:41 ...	6:10 AM		20	20
497	Bekis	Paul	9/20/2004 5:46:03 ...	7:45 AM		479	28

At the bottom of the window are buttons for **Find Now**, **Reset**, **Print**, and **Exit**.

Figure 12-2. Searching the archive for check-in records

Search Tab

You have the following options to search your Check-In History:

- **Employee.** Allows you to select a particular employee from the drop-down list or to search for an employee by name by clicking the Employee button. For information about the employee lookup feature, see the next section.
- **Date Range.** Allows you to search check-in records within a given date range. You can select a date by clicking the pull-down arrows and selecting the date from the popup calendar. You can also type the dates. If you only specify the month and year, the Employee Check-In system uses the first date of the month as the default value.
- **Time Range.** Allows you to search check-in records within a given time period. You can select a time by clicking the clock button and selecting the dates from the popup clock.



① **T.O.M Tip**

Do I have to enter dates into both the From and To search date fields?

The date range search option allows you to just enter just a From or a To search date. the search screen assumes the missing date. For example, if you just enter a From search date of 9/1/2004, the search screen assumes you are asking for all Check-In History records with a date greater than or equal to 9/1/2004. Conversely, if you just enter a To search date of 9/30/2004, the search screen assumes you are asking for all Check-In History records with a date less than or equal to 9/30/2004.

- **Report to Print.** Allows you to select a report from the pull-down arrow.
- **All Check-Ins where # of minutes late was equal to or greater than.** Allows you to search for records where an employee checked in the specified number of minutes late or later. For example, to search for employees who were five or more minutes late, type 5 or click the arrows until 5 displays in the field.
- **Shift.** Allows you to search for all Check-In History records that were for a specific shift.
- **Batch ID.** Allows you to search using the batch identification number. The batch identification number is assigned to the check-in records when they are archived. By assigning a group of Check-In History records a batch identification number, T.O.M. allows you to search, for example, for all check-in history records for that particular day's morning shift.

To search for an individual check-in record:

1. Click the Employee button. The Employee Check-In system displays the Find an Employee dialog (Figure 12-4).

Click here to search for an employee.

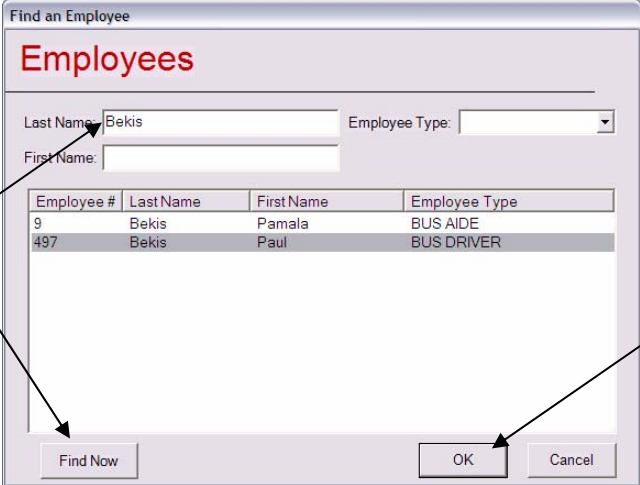
Figure 12-3. Using the Employee button to search for an employee

2. Select or type the criteria you want to use to search for the employee.



3. Click the Find Now button.
4. Select the employee's record, and click the OK button.

Figure 12-4 shows that Bekis was used as the search criteria and that Paul Bekis's record has been selected.



The "Find an Employee" dialog box has a title bar "Find an Employee" and a main title "Employees" in red. It contains input fields for "Last Name" (filled with "Bekis") and "Employee Type" (a dropdown menu). Below these is a "First Name" field. A table lists employees with columns "Employee #", "Last Name", "First Name", and "Employee Type". The table has two rows: one for "9 Bekis Pamala BUS AIDE" and one for "497 Bekis Paul BUS DRIVER", with the second row highlighted. At the bottom are "Find Now", "OK", and "Cancel" buttons. Callout boxes point to the "Last Name" field, the "Find Now" button, and the "OK" button.

Select or type your search criteria.

Click here to search the database.

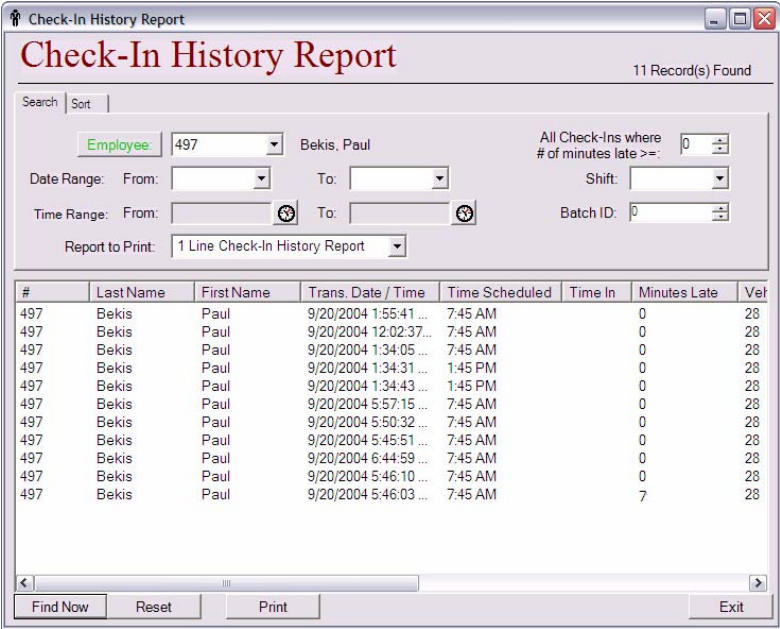
Click OK to select the employee's record.

Employee #	Last Name	First Name	Employee Type
9	Bekis	Pamala	BUS AIDE
497	Bekis	Paul	BUS DRIVER

Figure 12-4. Searching for an individual employee

You are then returned to the Check-In History Search screen with that selected employee's number and name filled in.

5. Click the Find Now button on the Employee-Check In screen to display the employee's archived check-in records (Figure 12-5).



The "Check-In History Report" screen has a title bar "Check-In History Report" and a main title "Check-In History Report" in red. It shows "11 Record(s) Found". There are "Search" and "Sort" tabs. The "Employee" dropdown is set to "497" and "Bekis, Paul". There are fields for "Date Range" (From: To:), "Time Range" (From: To:), "All Check-Ins where # of minutes late >=:" (0), "Shift:" (dropdown), and "Batch ID:" (0). A "Report to Print:" dropdown is set to "1 Line Check-In History Report". A table lists check-in records with columns "#", "Last Name", "First Name", "Trans. Date / Time", "Time Scheduled", "Time In", "Minutes Late", and "Ver". The table has 11 rows, all for employee 497, Bekis, Paul, on 9/20/2004. Callout boxes point to the "Employee" dropdown and the "Find Now" button.

Click Find Now to search for Paul Bekis's archived check-in records.

#	Last Name	First Name	Trans. Date / Time	Time Scheduled	Time In	Minutes Late	Ver
497	Bekis	Paul	9/20/2004 1:55:41 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 12:02:37 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 1:34:05 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 1:34:31 ...	1:45 PM		0	28
497	Bekis	Paul	9/20/2004 1:34:43 ...	1:45 PM		0	28
497	Bekis	Paul	9/20/2004 5:57:15 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 5:50:32 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 5:45:51 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 6:44:59 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 5:46:10 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 5:46:03 ...	7:45 AM		7	28

Figure 12-5. Searching archived check-in records for an individual employee



Sort Tab

The Check-In History Search screen not only allows you to search your Check-In History database but to also change the sort order of the search results. The ability to change the sort order of the search results gives you even more powerful researching and reporting capabilities.

For example, with this feature, you could ask the following question: “Please give me all the times an employee was critically late to check-in and sort the results by number of minutes late in descending order (most late first).”

Adding the dimension of the sort order greatly changes the usefulness of this report. The following are the steps you would take to change the sort order of the search results of your Check-In History Search:

1. Click the Sort tab in the Check-In History Report screen.
2. Select the sorting options from the pull-down arrows (Figure 12-6).
3. Click the Find Now button to sort the records.

Figure 12-6 shows the results of sorting check-in records by Last Name and then by Shift.

The screenshot shows a window titled "Check-In History Report" with a subtitle "759 Record(s) Found". It has a "Search" tab and a "Sort" tab. Under the "Sort" tab, there are three sorting options: "Sort By #1", "#2", and "#3". The first dropdown is set to "Last Name" and the second to "Ascending". The second dropdown is set to "Shift" and the third to "Ascending". A third dropdown menu is open, showing options: "First Name", "Last Name", "Transaction Date", and "Shift". Below the sorting options is a table with the following columns: "#", "Last Name", "First Name", "Trans. Date / Time", "Time Scheduled", "Time In", "Minutes Late", and a checkbox. The table contains several rows of data, including records for "Bekis Paul" and "Bessy James". At the bottom of the window are buttons for "Find Now", "Reset", "Print", and "Exit".

#	Last Name	First Name	Trans. Date / Time	Time Scheduled	Time In	Minutes Late	
497	Bekis	Paul	9/20/2004 5:57:15 ...	7:45 AM	0	0	
497	Bekis	Paul	9/20/2004 5:50:32 ...	7:45 AM	0	0	
497	Bekis	Paul	9/20/2004 1:34:05 ...	7:45 AM	0	0	
497	Bekis	Paul	9/20/2004 5:45:51 ...	7:45 AM	0	0	
497	Bekis	Paul	9/20/2004 6:44:59 ...	7:45 AM	0	0	
497	Bekis	Paul	9/20/2004 12:02:37 ...	7:45 AM	0	0	
497	Bekis	Paul	9/20/2004 1:55:41 ...	7:45 AM	0	0	
497	Bekis	Paul	9/20/2004 5:46:10 ...	7:45 AM	0	0	
497	Bekis	Paul	9/20/2004 5:46:03 ...	7:45 AM	7	0	
497	Bekis	Paul	9/20/2004 1:34:31 ...	1:45 PM	0	0	
497	Bekis	Paul	9/20/2004 1:34:43 ...	1:45 PM	0	0	
434	Bessy	James	9/20/2004 6:44:59 ...	6:15 AM	0	0	
434	Bessy	James	9/20/2004 5:57:15 ...	6:15 AM	0	0	
434	Bessy	James	9/20/2004 12:02:37 ...	6:15 AM	0	0	
434	Bessy	James	9/20/2004 5:46:10 ...	6:15 AM	0	0	

Figure 12-6. Sorting archived check-in records



Generating and Printing Check-In History Reports

Once you have found the group of check-in history records you were researching, you can generate and print several types of check-in reports for an employee or a group of employees by clicking the Print button. When you click the Print button, the Employee Management system displays a dialog that allows you to select the type of report you want to generate and to type in its title.

#	Last Name	First Name	Trans. Date / Time	Time Scheduled	Time In	Minutes Late	Ver
497	Bekis	Paul	9/20/2004 1:55:41 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 12:02:37...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 1:34:05 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 1:34:31 ...	1:45 PM		0	28
497	Bekis	Paul	9/20/2004 1:34:43 ...	1:45 PM		0	28
497	Bekis	Paul	9/20/2004 5:57:15 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 5:50:32 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 5:45:51 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 6:44:59 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 5:46:10 ...	7:45 AM		0	28
497	Bekis	Paul	9/20/2004 5:46:03 ...	7:45 AM		7	28

Click the Print button to generate and print an employee report.

NOTE: For more information about generating and printing reports, see Chapter 13 of the Users section.

Purging Records from Your Check-In History Database

Over time, the Check-In History database can become quite large. The Check-In feature has a purge routine that allows you to, every now and then, remove older check-in records from this database. A good example of this would be to once a year save a copy of the Check-In database on a CD or archive folder named something appropriate like (Check-In_2004) and then to purge all the check-in records from it. You would then have an empty history database that would then accumulate this year's check-in history.

You can also delete all the check-in history records by leaving all the fields blank and then clicking the Purge Now button.

To purge records from your check-in history:

1. Select File>Purge from the Employee Check-In screen (Figure 12-7).

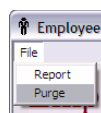


Figure 12-7. Selecting File>Purge



The Employee Check-In software displays the Check-In History Purge screen (Figure 12-8).

2. To complete the screen:
 - Select the From and To dates by clicking the pull-down arrows and picking the dates from the calendar.OR
 - Type the batch identification number.
3. Click the Purge Now button.

Figure 12-8 shows that records archived over the period of one year and with a batch identification number of 30 have been deleted.

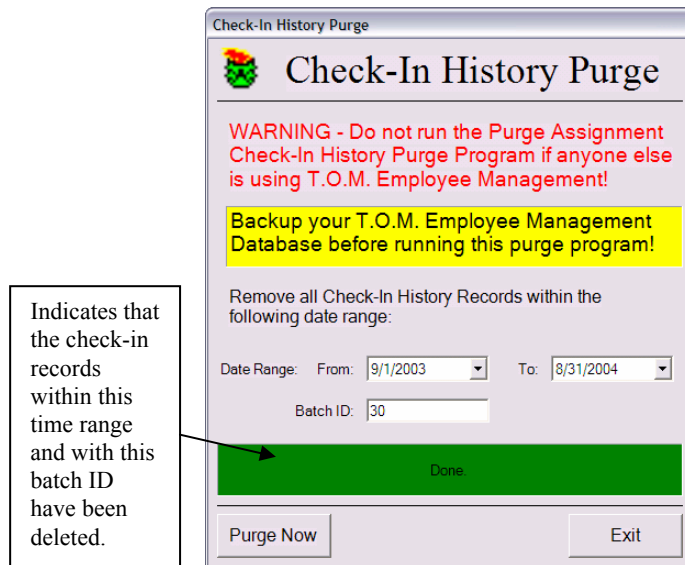


Figure 12-8. Completing the Check-In History Purge screen