

## ***Chapter 6***

# **Working with Employee Notes**

Many times just keeping notes on various incidents and activities regarding employees can be one of the most useful features of good employee management. The T.O.M. Employee Management software allows you to keep unlimited notes for each of your employees as well as date and time stamping the note and recording who made the note for the employee.

You can view, add, edit, and delete notes as well as generate and print note reports. In this chapter, the following topics should help you with these tasks:

- Viewing Note
- Adding Notes
- Editing Notes
- Generating and Printing Note Reports
- Deleting Notes

## **Viewing Notes**

1. Click the Employees tab.
2. Click the Reset button to clear the screen. The Employee Management system clears the screen.
3. Enter the search criteria.
4. Click the Find Now button to retrieve all the employee records in the database that match your selected criteria.

Figure 6-1 shows the results of using Smith as the search criteria:



**Search Employees**

File Security Maintain Window Help

**T.O.M. Employee Management** Thursday, September 02, 2004

Employees Reminders Training Absences Accidents 6 Record(s) Found

Employee ID:  SSN:  Gender: ☐ Male ☐ Female

Last Name:  First:  Address:  ☐ Search Entire Ethnicity:  Employee Type:

General User Defined Employment Dates Sorting

Employee #	Last Name	First Name	Employee Type	Phone	Address
264	SMITH	ALVIN	DRIVING AIDE		28 Rte 3 North
338	SMITH	DONALD	DRIVER	8987889087	
438	SMITH	LATASHA	DRIVER		
265	SMITH	REBECCA	DRIVER		
686	SMITH	STANLEY	DRIVER	5151234567	127 ELM STREET
339	SMITH	VANESSA	DRIVER		5609 N BIRCH AVE

Show on Map New Edit Delete

Find Now Reset Group Training Group Reminder Print Exit

Select the employee record you want to edit, and click Edit. You can also double-click the record.

Figure 6-1. Search results of Smith

5. To view the Employee screen:
  - Double-click the employee's record.OR
  - Select the employee record, and click Edit.
6. Click the Notes tab. The Employee Management system displays notes that have been added to the system (Figure 6-2).



Employee Maintenance -

**Employee** SMITH, STANLEY ID#686

General | Employment & License | Reminders | **Notes** | Accidents | Absences | Training | User Defined

ID	Date	Time	Note	Entered By	Enter Date
I	9/5/2004	11:10 AM	He is going to be out for the last six weeks of the school year due to surgery.	USER	9/5/2004 3:10 PM

Insert Note Delete

OK Routes Exit

Figure 6-2. Viewing notes that have been added to an employee's record

## Adding Notes

In this section, you will learn how to add a note to the system. You will find a description for each field on the Notes screen after the procedure below.

### Adding Notes

1. Click the Insert Note button on the Notes screen. The Employee Management system displays any notes that have been added to the employee's record (Figure 6-3).

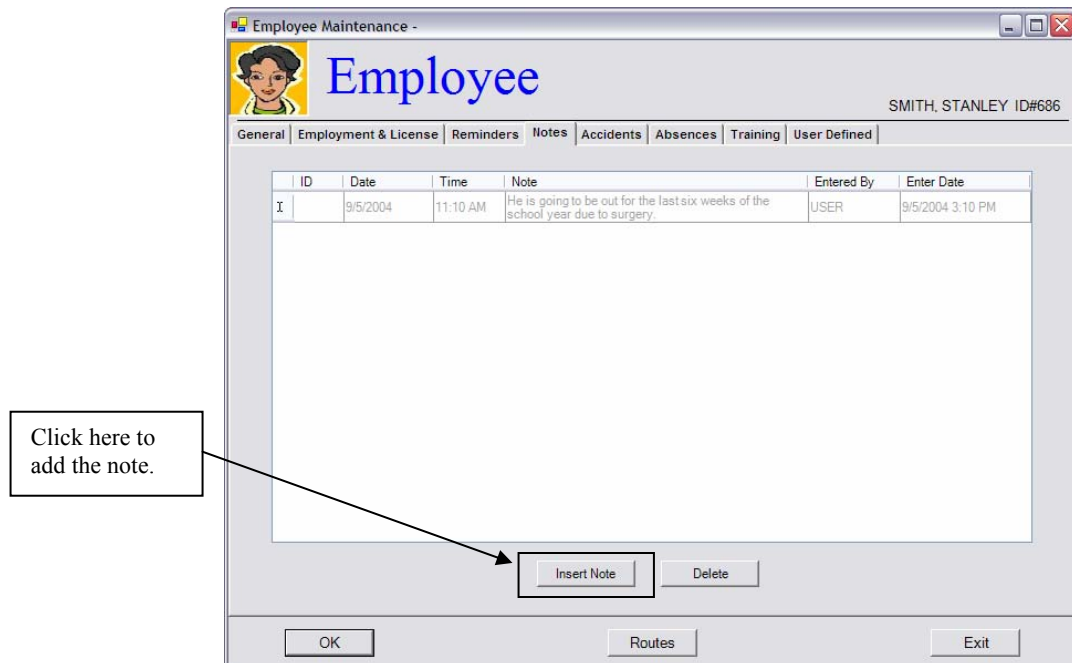


Figure 6-3. Clicking the Insert Note button

The Employee Management system updates the screen so you can add the note.

2. Select or type in the information you want to save with the note. For a detailed description of all the fields on this screen, see the Notes Screen section.



**① T.O.M. Tip**

**Do I have to complete the entire screen?**

No. You do not need to complete all the fields on the Notes screen. However, if you do not want to specify a date or time, you need to click Clear on the calendar and clock or delete the default values from these fields. Otherwise, the Employee Management system uses your system's date and time to complete these fields.

3. Click the OK button to add the note to the system and close the screen.

A sample completed note looks similar to:



Employee Maintenance -

**Employee** SMITH, STANLEY ID#686

General | Employment & License | Reminders | **Notes** | Accidents | Absences | Training | User Defined

ID	Date	Time	Note	Entered By	Enter Date
	9/5/2004	11:10 AM	He is going to be out for the last six weeks of the school year due to surgery.	USER	9/5/2004 3:10 PM
X	10/20/2004	3:30 PM	He is switching routes with Jim Holligan because he has a doctor's appt.	USER	9/5/2004 3:26 PM

Insert Note Delete

OK Routes Exit

Figure 6-4. Sample completed the Notes screen

- Click the OK button to save your changes and close the screen. The Employment Management system adds the note.

## Notes Screen

Employee Maintenance -

**Employee** SMITH, STANLEY ID#686

General | Employment & License | Reminders | **Notes** | Accidents | Absences | Training | User Defined

ID	Date	Time	Note	Entered By	Enter Date
17	9/5/2004	11:10 AM	He is going to be out the last six weeks of the school year due to surgery	USER	9/12/2004 5:25 PM
18	10/20/2004	3:30 PM	He is switching routes with Jim Holligan because he has a doctor's appt.	USER	9/12/2004 5:30 PM

Insert Note Delete

OK Routes Exit

Figure 6-5. Adding a note to the system



You can add the following note information (see Figure 6-6) to the system:

**NOTE:** The **ID**, **Entered By**, and **Entered Date** fields are maintained by the software, and you cannot change them. Also, you are not required to enter a note **Date** or **Time**. You can leave these fields empty by deleting the text in the field or by clicking in the field, displaying the calendar, and selecting **Clear**. If you do not select **Clear**, the Employee Management system enters your system time and date into these fields. Lastly, you can use your mouse button to right-click in the fields to perform **Cut**, **Copy**, and **Paste**.

- **ID.** Displays the identification number the Employee Management system uses for the note. The system assigns this number to the note, and you cannot change this field.
- **Date.** Allows you to enter or select the date for the note. Suppose you are adding a note to an employee's record for an incident that occurred several days ago. You can enter or select that date for this field. This field is different from the Enter Date field because the Enter Date is the date the note was added to the system and cannot be changed.
  - » You can access the calendar by clicking on the pull-down arrow. Then, you can use the arrows displayed around the month to change the month or the arrows around the year to change the year. When the calendar displays the correct month and year, select the day. After you click the day, the Employee Management system closes the calendar and displays the date.
  - » You can also type a date into any of these fields, but if you only type the month and year, the Employee Management system uses the first of the month as the default value.
- **Time.** Allows you to enter or select the time the note was added to the system. the Employee Management system requires that you use the format of hh:mm a.m/p.m. For example, to search for accidents occurring at 2:30 in the afternoon, you need to type 2:30 pm into the field.
- **Note.** Allows you to type the note text. There is no limit to the number of characters you can type into this field.
- **Entered By.** Displays the user name of the person who added the note to the system.
- **Enter Date.** Displays the date the note was added to the system.

ID	Date	Time	Note	Entered By	Enter Date
	9/5/2004	11:10 AM	He is going to be out for the last six weeks of the school year due to surgery.	USER	9/5/2004 3:10 PM
▶	9/5/2004	▼ 11:26 AM		USER	9/5/2004 3:26 PM

Figure 6-6. Employee Notes screen



## Editing Notes

Editing notes you have added to an employee's record is very similar to editing his employee record information. However, there is no Edit button on the Notes screen. To edit the record, you click in the fields and change them.

### *To edit employee notes:*

1. Click in the field you want to change.
2. Make your changes.

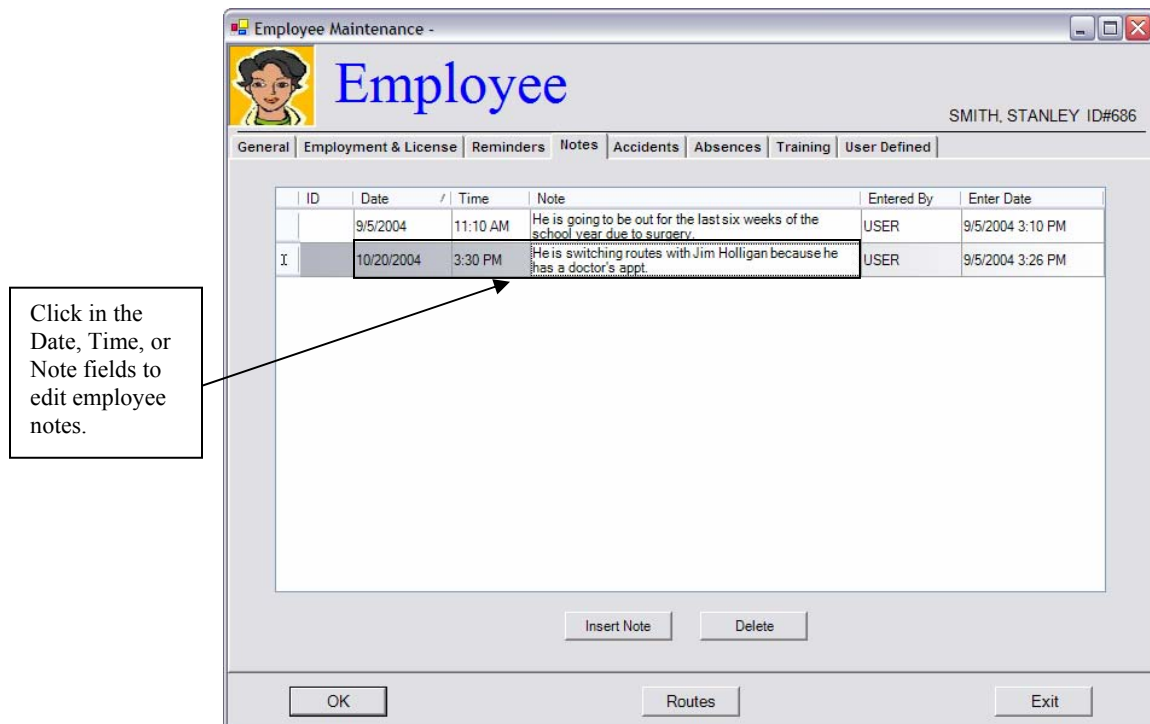


Figure 6-7. Editing employee notes

2. Click OK to save your changes. The Employee Management system updates the note and closes the screen.

## Generating and Printing Note Reports

You can generate and print several types of notes 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 note report you want to generate and to type in its title.



**Search Employees**

File Security Maintain Window Help

**T.O.M. Employee Management** Thursday, September 02, 2004

Employees Reminders Training Absences Accidents 6 Record(s) Found

Employee ID:  SSN:  Gender: ☐ Male ☐ Female

Last Name:  First:

Address:  ☐ Search Entire Ethnicity:  Employee Type:

General User Defined Employment Dates Sorting

Employee #	Last Name	First Name	Employee Type	Phone	Address
264	SMITH	ALVIN	DRIVING AIDE		
338	SMITH	DONALD	DRIVER	8987889087	829 ORANGE AVE
438	SMITH	LATASHA	DRIVER		
265	SMITH	REBECCA	DRIVER		
686	SMITH	STANLEY	DRIVER	5151234567	127 FELICITY LANE
339	SMITH	VANESSA	DRIVER		5609 N BIRCH AVE

Show on Map New Edit Delete

Find Now Reset Group Training Group Reminder Print Exit

Click the Print button to generate and print a note report.

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

## Deleting Notes

When you delete notes from an employee's record, the Employee Management system removes it from the employee's record.

**To delete a note from an employee's record:**

1. Select the note you want to delete (Figure 6-8).
2. Click the Delete button. The Employee Management system asks if you are sure you want to delete the record.





ID	Date	Time	Note	Entered By	Enter Date
	9/5/2004	11:10 AM	He is going to be out for the last six weeks of the school year due to surgery.	USER	9/5/2004 3:10 PM
I.	10/20/2004	3:30 PM	He is switching routes with Jim Holligan because he has a doctor's appt.	USER	9/5/2004 3:26 PM

Click the Delete button to delete the note from the employee record.

Figure 6-8. Deleting a note from an employee record

4. Click OK to delete the note. The Employee Management system deletes the note from the employee's record.