Chapter 5

Employee Reminder Lookup Lists

Reminders are one type of transaction you can add to employee records. You can set up reminders for tasks that employees need to complete. For example, you can use reminders to track the certification expiration dates for your employees.

These reminders appear in the software as lookup lists in the Reminders tab of the Employee Management screen. There are two reminder lookup lists:

- **Reminder Categories.** A broad grouping or classfication of reminders.
- **Reminder Types.** "Tells" the software when the reminder is to issue a warning if the reminder is for training or some type of activity that requires accruing of some hours and/or if the completion of the reminder automatically causes another reminder (referred to as a follow-on or successive reminder) to be generated.

  ⓘ *T.O.M Tip*	**What is the difference between a reminder category and a reminder type?** Reminder types are subcategories of reminder categories. For example, one of the prebuilt reminder categories is Training. The prebuilt reminder types associated with training are behind the wheel and classroom. The reminder types allows you to

The T.O.M. Employee Management software ships with the reminder lookup lists "predefined" so that you do not have to try and create them yourself.

- If you are setting up a reminder for an employee named Stanley Smith, you can click the Reminder Category pull-down arrow and select the Reminder Category of *Training*.
- After you select the Reminder Category, the Employee Management system displays the Reminder Types that are associated with the selected Reminder Category. Using the previous example of Training as the Reminder Category, you could select Classroom or Refresher as the Reminder Type. Specifically, the Reminder Type

Because the Employee Management system ships with these lookup lists already in the system, you can literally start using the software right away because you can select from the predefined options. However, if you do not like the values in any of these lookup lists, your organization can easily change them.

Reminder Categories

Reminder categories allow you to group and organize your reminders into various categories such as Evaluation or Training. The T.O.M. Employee Management software uses the Reminder Types to allow you to search and report on your various reminders. Using Reminder Category, for example, you can ask the T.O.M. software to find all your mechanics who are due for training.

This section explains the following:

- Adding a New Reminder Category
- Editing or Changing Reminder Categories to Inactive
- Deleting Reminder Categories

Adding a New Reminder Category

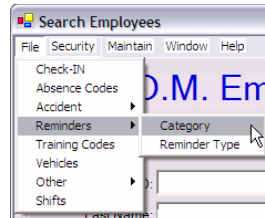1. Select File>Reminders>Category (Figure 5-1).

Figure 5-1. Selecting File>Reminders> Category

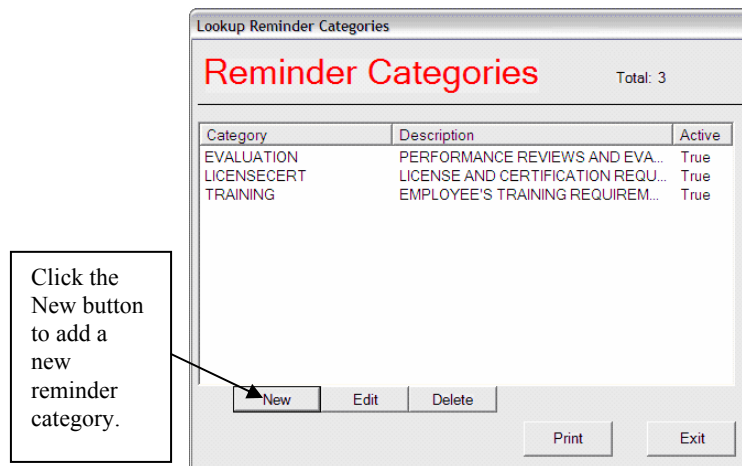The Employee Management system displays the Lookup Reminder Categories screen (Figure 5-2).

Click the New button to add a new reminder category.

Figure 5-2. Lookup Reminder Categories screen

2. Click the New button. The Employee Management system displays the Reminder Category screen.

3. Type the and description (Figure 5-3).

- **Category.** Allows you to enter up to 20 alphanumeric characters, meaning you can type both letters and numbers. This is a required field.
- **Description.** Allows you to enter up to 50 alphanumeric characters.
- **Active.** When selected, specifies that the reminder category can be assigned to employees.

4. Make sure the Active checkbox has a check in it. If it does not, the reminder category will not appear in the Reminder Category pull-down list on the Reminders screen.

Figure 5-3 shows adding a code of O for Other:

Click OK to add the reminder category to the system.

Figure 5-3. Adding a new ethnicity code

5. Click the OK button to add the reminder category to the system.

Editing or Changing Reminder Categories to Inactive

In addition to being able to edit reminder categories you can change them to inactive. The advantage of changing them to inactive rather than deleting them is that it still exists in the system but does not display in the Reminder Category pull-down list.

To edit a reminder category or change it to inactive:

1. To edit the reminder category or change it to inactive, select it and click Edit, or double-click on it to display the Reminder Category screen (Figure 5-4).

Select the reminder category you want to edit.

You can also double-click the reminder category to display the Reminder Category screen.
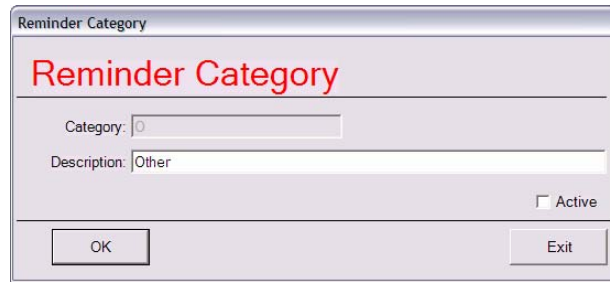
Figure 5-4. Selecting a reminder category

2. Make your changes to the screen.

Figure 5-5 shows that the Other code has been changed to Inactive:

Figure 5-5. Changing a reminder code to Inactive

Deleting Reminder Categories

If you delete a reminder category, you are removing it from the system. Rather than doing this, you might consider changing it to inactive. That way, it still exists in the system but does not appear in the pull-down lists.

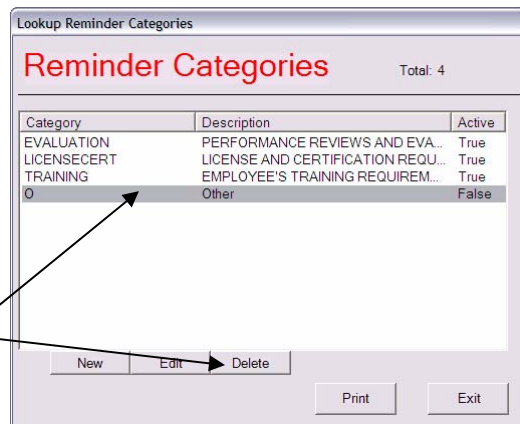|	
ⓘ *T.O.M Tip*	**I tried to delete a reminder category but couldn't. What am I doing wrong?** The database will not allow you to delete a reminder category that has been assigned to employee reminders. Therefore, if you have a reminder category you don't want to use but still have it assigned to employees, you can either change it for those employee reminders and then delete it, or you can change the reminder categories status to inactive by making sure a checkmark does not appear in the Active checkbox on the Reminder Category screen.

To delete a reminder category:

1. Select the reminder category you want to delete.

2. Click the Delete button (Figure 5-6).

Select the reminder category you want to delete.

Then, click the Delete button.

You cannot delete reminder categories that have been assigned to employee reminders.

Either change the reminder category assigned to those employee reminders and then delete it, or select it and click Edit. Make sure a checkmark does not appear in the Active checkbox.

Figure 5-6. Deleting a reminder category

The Employee Management system asks if you are sure to want to delete the code.

3.   Click the Yes button to delete the code.

Reminder Types

Reminder types allow you to group and organize your employee reminders within overall reminder categories. For example, a reminder category of Evaluation may have the following reminder types: Annual or Probation, and the Category of LicenseCert may have related reminder types of License, Certification, Drug and Physical.. The T.O.M. Employee Management software uses the reminder types to allow you to search and report on your various classification of employees. Using reminder type, for example, you can ask the T.O.M. software to find all your drivers and show their classroom training reminder records.

This section explains the following:

- Adding a New Reminder Type
- Editing or Changing Reminder Types to Inactive
- Deleting Reminder Types

Adding a New Reminder Type

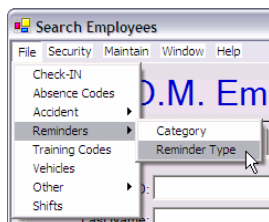1.   Select File>Reminders>Reminders Type (Figure 5-7).

Figure 5-7. Selecting File>Reminders>Reminder Type

The Employee Management system displays the Lookup Reminder screen (Figure 5-8).

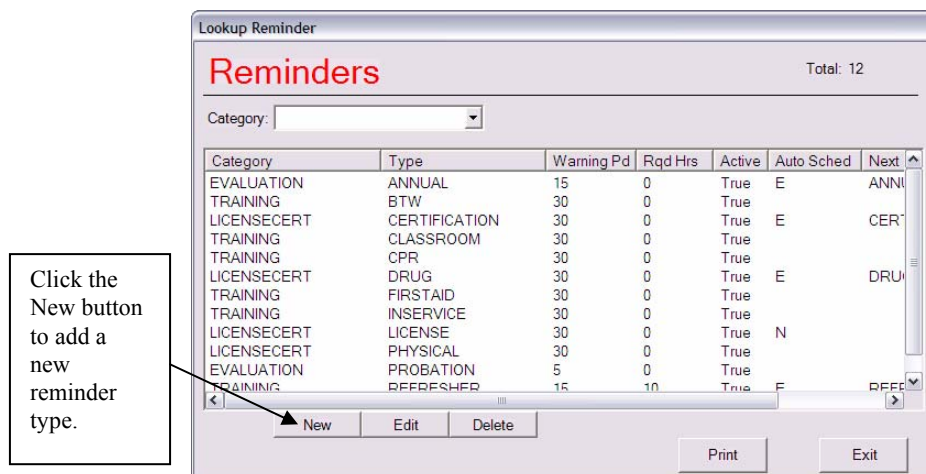Click the New button to add a new reminder type.

Figure 5-8. Lookup Reminder screen

2.   Click the New button. The Employee Management system displays the Reminder Type screen.

3.   Type the reminder type and description (Figure 5-9).

- **Category.** Allows you to select the category you want to associate the new reminder with. This is a required field.

- **Reminder Type.** Allows you to enter up to 30 alphanumeric characters, meaning you can type both letters and numbers. This is a required field.

- **Description.** Allows you to enter up to 50 alphanumeric characters.

- **Warning Period.** When you launch the Employee Management system, the Reminders tab is the default view of the Employee Management screen. The Reminders tab displays reminders that are due within the warning period. The number of days you enter into this field controls when reminders appear on the Reminders tab. For example, if you type 14 into this field, this type of reminder displays by default on the Reminders tab two weeks before its due date.

- **Required Hours.** It can be used for those reminder types that are for tasks that an employee must complete that require a certain number of hours for the task to be completed officially. A good example of this would be a training type of reminder. For example, the Reminder Type may be Behind The Wheel Training and the Required Hours may be 25. This field is optional.

- **Active.** When selected, specifies that the reminder type can be assigned to employee reminders.

- **Automatically Schedule New Reminder.** When you click in this checkbox, the Employee Management system enables you to automatically schedule successive, or follow-on, reminders when this reminder of this type closes, is due, or both. When you set up a reminder to be automatic, you do not need to add other successive reminders to the system each year. Rather, you set up the re-occuring reminder once, and the software automatically manages the creation of new reminders using the re-occuring options described below. The Employee Management system uses the settings you specify on the following fields to schedule it for the next year.

  » **When this reminder is complete: Complete, Due, Either Complete or Due, whatever happens first.** Sets the trigger as to when the follow on reminder will be generated. This does not affect that follow-on reminder's due date; another parameter sets this. It only affects *when* the software creates a new reminder transaction for the employee.

    - **Completed**. Tells the software to generate the new reminder transaction when the current reminder is marked as completed.

    - **Due**. Tells the software to generate the new reminder when the current reminder is due (the current date is same or later than the due date of the reminder).

    - **Compeleted or Due, whatever happens first**. Tells the software to generate a new reminder when the current reminder is either marked as completed or becomes due, whichever occurs first.

  » **What kind of reminder should be scheduled.** Allows you to specify whether you want to schedule the same type of reminder for the successive reminder. This can be very useful if employees complete a renewal cycle of tasks each year. For example, suppose that your employees have to complete CPR training this year, General First Aid next year, and continue this training pattern throughout their employment in your district. In this case, when you set up the CPR training reminder type, you would select General First Aid from the pull-down list. Then, when you are setting up the General First Aid reminder type, you would select the CPR training reminder type from this pull-down list.

  » **Set Due Date By.** Tells the software how to calculate the reminder due date for the new reminder generated by using these settings:

- **Adding This Many Days.** Specifies the number of days to be added to the *To this reminders _____ Date* value. For example, 365 days adds a year to the date that you specifiy in the *To this reminders _____ Date* value.
- **To this reminders _____ Date**.Allows you to select the base date that you want the number of days to be added from; you can choose from the current reminder's Due Date or Completed Date as the base date.

4. Make sure the Active checkbox has a check in it. If it does not, the reminder type will not appear in the Reminder Type pull-down list on the Reminders screen.

Figure 5-9 shows adding a reminder type of Safety to the reminder category of Training:

Click OK to add the reminder type to the system.

Figure 5-9. Adding a new reminder type

5. Click the OK button to add the reminder type to the system.

Editing or Changing Reminder Types to Inactive

In addition to being able to edit reminder types, you can change them to inactive. The advantage of changing them to inactive rather than deleting them is that the reminder type still exists in the system but does not display in the Reminder Type pull-down list.

To edit a reminder type or change it to inactive:

1. To edit the reminder type or change it to inactive, select it and click Edit, or double-click on it to display the Reminder Type screen (Figure 5-10). *If your database has many reminder types, you can click the Category pull-down list to display only those reminders associated with the selected category.*
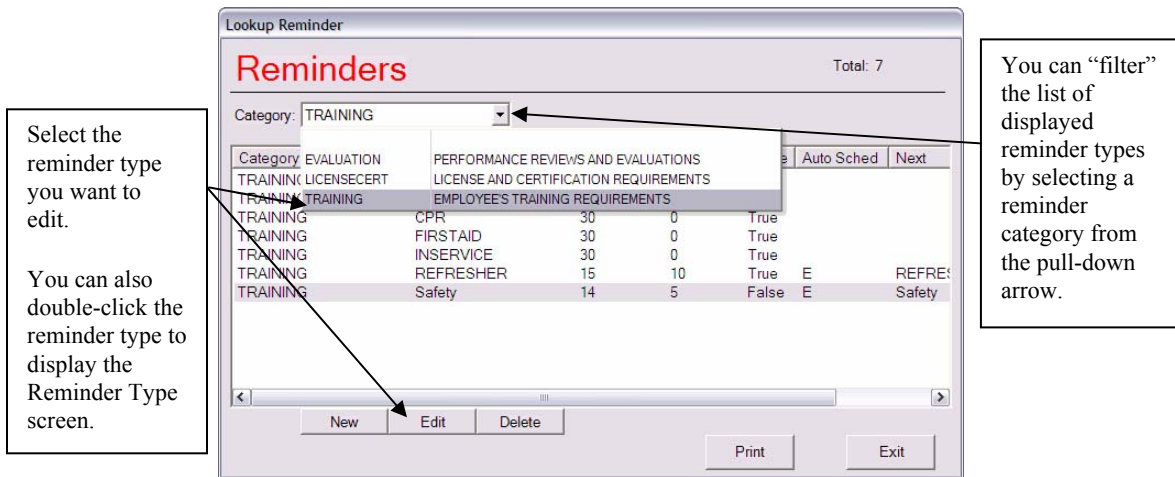
Figure 5-10. Selecting a reminder type

2. Make your changes to the screen. Figure 5-11 shows that the Reminder Type of Safety has been changed to Inactive:

Figure 5-11. Changing a reminder type to Inactive

Deleting Reminder Types

If you delete reminder types, you are removing them from the system. Rather than doing this, you might consider changing them to inactive. That way, the reminder type still exists in the system but does not appear in the pull-down lists.

<table>
<tr>
<td>ⓘ **T.O.M Tip**</td>
<td>**I tried to delete a reminder type but couldn't. What am I doing wrong?**

The database will not allow you to delete reminder types that have been assigned to employee reminders. Therefore, if you have an reminder type you don't want to use but still have it assigned to employee reminders, you can either change the reminder type for those employee reminders and then delete it, or you can change the reminder type's status to inactive by making sure a checkmark does not appear in the Active checkbox on the Reminder Type screen.</td>
</tr>
</table>

To delete a reminder type:

1. Select the reminder type you want to delete. *If your database has many reminder types, you can click the Category pull-down list to display only those reminders associated with the selected category. Figure 5-6 shows clicking the pull-down list.*

2. Click the Delete button (Figure 5-6).

Select the reminder type you want to delete.

Then, click the Delete button.

You cannot delete reminder types that have been assigned to employee reminders.

Either change the reminder types assigned to those employee reminders and then delete the reminder type, or select it, and click Edit. Make sure a checkmark does not appear in the Active checkbox.

Figure 5-12. Deleting a reminder type

The Employee Management system asks if you are sure to want to delete the reminder type.

3. Click the Yes button to delete the reminder type.