Chapter 2

Getting Started

This chapter describes how to start the Employee Management system, provides a checklist of the tasks that must be performed before you can start using the software in your organization, and explains the main screen of the Employee Management system.

"OK, I've got the Employee Management software on my computer...now what?"

Common questions people ask at this point are:

- How does the product work?
- Can I start using the software straight out of the box?
- Does this work with the T.O.M. Field Trip Administration software?
- How do I know what information to put into the system?
- I like the idea of adding training transactions to the software, but our employees are required to attend a lot of training. Wouldn't it take forever to add each of these transactions to each employee record?
- Are there any advantages to adding more information to the system than our district wants to track?
- What if we don't track a particular type of information now but later decide to?
- Some of the employee information we would like to track is very sensitive. Is there any way we can set up different levels of access?
- After I installed the software, I saw two icons on my desktop. I know the one with the people on it is the Employee Management system icon. What's the other icon for?

How does the product work?

As you will see in the *Using the Employee Management System's Main Screen* section later in this chapter, the Employee Management system consists of a main screen with tabs that organize various types of information for each of your employees. You will see the following tabs on the main screen (Figure 2-1):

- Employees
- Reminders
- Training
- Absences
- Accidents
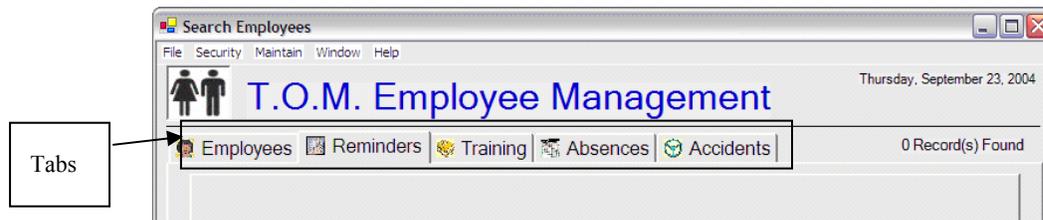
Figure 2-1. Tabs on the Employee Management screen

Understanding the database records:

- **Master records.** The Employees tab allows you to search for employee records. Employee records are the "master records" in your database. These records contain employee information such as hire date or certification number. This type of data is considered "one to one" information, meaning, for example, that each employee only has one hire date or one certification number.

- **Transactions.** You can use the other tabs—Reminders, Training, Absences, and Accidents—to search for reminders, training, absences, and accidents that have been added to the employee records. Each time you add this type of information to the system, you are adding a "transaction" to the master employee record. Transactions like accidents or reminders regarding an employee are considered "one to many" information. For example, each employee has potentially many absences or reminders.

Adding employee records and transactions to the database:

When you add an employee record to the system, you first fill out the one to one type (or master record) information and then continually add the one to many type of information. In other words, you first add the employee data using the General, Employment & License, and User Defined tabs and then add transactions—reminders, training, absences, accidents, and notes—using the other tabs.

NOTE: To see a sample employee record with transactions added to it, see the Sample Employee Record with Transactions section later in this chapter.

Can I start using the software straight out of the box?

As with any powerful software system, T.O.M. requires some up-front setup work that you must perform **one time** to allow you to use the system.

Gecko Microsolutions tried to minimize this upfront time by shipping the T.O.M. Employee Management software with a lot of the lookup lists that you would normally have to setup before using the software "prebuilt" with lists of information that you can choose to use or change. For example, the prebuilt lookup list for Employee Ethnicity consists of A (Asian), AI (American Indian), B (Black or African American), H (Hispanic or Latino), and W (White).

Does this work with the T.O.M. Field Trip Administration software?

Yes. The Employee Management system and the T.O.M. Field Trip Administration use the same database, so if you already use that software, you may not have to do anything to get started with the Employee Management system. It really depends on the information your district wants to track. Also, because both software products use the same database, you only have to change information in one software, and the other software recognizes those changes.

- *What information comes into the Employment Management system from the T.O.M. Field Trip Administration system?*
    - » General employee information such as name, address, employee types, vehicle types, and vehicles, license #, license expiration date, certification #, certification date, vehicle the driver is assigned to, and the active or inactive flag.
    - » Employee bus runs (or routes as they are known in the Field Trip software).
- *Do I still have to set up some of the lookup lists?*
    - » The Employee Management system allows you to add additional employee information such as ethnicity and the department the employee that you might need to set up.
    - » The Employee Management system allows you to track absences, accidents, training, and reminders. Each of these features has codes that have been set up for you so that you can begin using the software. For example, you can begin adding absences to the system using the absence codes that have been preset in the system. You can also create your own absence codes or change the existing ones.
    - » You can also keep track of employees as they check in when they arrive for their shifts using the Check-In feature. This powerful tool helps school districts ensure that students are transported to and from school on time. If you use this tool, you can either use the shifts that have been preset in the system, or you can create your own shifts. The Check-In feature's setup is discussed in Chapter 3 of the *Getting Started* section and its use is discussed in chapters 8 to 12 of the *Users* section.
- *Some of the fields, like employee ethnicity, only appear in the Employee Management system and not in the T.O.M. Field Trip Administration software. What happens to that data when I'm using the T.O.M. Field Administration software?*
    - » The data still exists in the database, but the T.O.M. Field Trip Administration software ignores it because it doesn't use that data.

How do I know what information to put into the system?

It depends on the information your district wants to track. You can add employee training, reminders, absences, and accidents to the system and then use that data for lookup or reporting purposes. For example, if your district wants to keep track of employee absences, you can add them to the system and then generate a report showing how often employees are absent on Mondays or Fridays.

NOTE: To see a sample employee record with transactions added to it, see the Sample Employee Record with Transactions section later in this chapter.

I like the idea of adding training transactions to the software, but our employees are required to attend a lot of training. Wouldn't it take forever to add each of these transactions to each employee record?

The Employee Management system allows you to add group training to the system. For example, suppose 245 out of 250 your employees who are drivers attended classroom training. You do not need to add 245 training records to your system. Rather, you can add group training to the system. The system is flexible enough that you can even specify that only 245 of those 250 drivers attended the training. Not only is this significantly faster, but it prevents you from making data entry errors.

You can also add group reminders to the system.

Are there any advantages to adding more information to the system than our district wants to track?

The Employee Management system is very robust—you can add all kinds of employee information to the system. While you are not required to complete all the fields on all the tabs when adding employees to the system, you will find that the more information you add to the system, the more you can use that information to search for employees or to generate reports that are very specific to your organization.

For example, suppose your district frequently runs out of driver substitutes on Fridays. If you add absences to the system, you can generate a report showing which employees have been absent on Fridays.

NOTE: To see a sample employee record with transactions added to it, see the Sample Employee Record with Transactions section later in this chapter.

What if we don't track a particular type of information now but later decide to?

Suppose your district has historically not tracked employee training but that now your district would now like to. There are several ways you can do this:

- You could add past training to the system, or "retrofit" your database with the information. Although this might tedious if your district has hundreds of employees or you decide to retrofit the database with a long period of training information, it can be easily be done.
- You could start adding only current information to the database. Your district could decide, for example, to start entering training information effective the first of next month or at the beginning of the next school year.

Some of the employee information we would like to track is very sensitive. Is there any way we can set up different levels of access?

You can set up different levels of access, or permissions, to the system, which is especially important when dealing with sensitive information. This is discussed in *Chapter 11* of the *Getting Started* section.

After I installed the software, I saw two icons on my desktop. I know the one with the people on it is the Employee Management system icon. What's the other icon for?

The other shortcut launches the Employee Check-In software, which allows you to supervise employees as they check in.


Figure 2-2. Desktop shortcuts for the Employment Management system and Employee Check-In software

This software consists of two parts:

- **Employees check in as they arrive for their shifts.** As employees check in, they can view messages that have been added to the system for them specifically or for all employees.

- **You can track employees as they check in for their shifts.** After you start a new shift, you can view employee records for all employees who have a bus route during a shift. To help you visually distinguish between employees who have checked in and employees who have not, all entries on the Employee Check-In screen are color coded. You can even set up the system so that the workstation being used to supervise employees makes particular sounds to notify you when an employee's status changes from "scheduled to be here" to "late."

Where can I learn more about the Employee Check-In software?

You can learn about this software in *Chapters 8 to 12* of the *Users* section.

ⓘ *T.O.M Tip*

Putting It All Together

So far, you have been learning about the different pieces of the Employee Management system. Now you need to know how to put those pieces into a workflow that you can adapt to your work environment. The following step-by-step explains the overall process for using the system:

1. ***Decide what information your district wants to track.*** Before you start adding information to the system, Gecko Microsolutions recommends that you spend some time thinking about the data you want to track. In making these decisions, you might approach this task by asking yourself the following questions:

   - ***What kinds of reports do I need to generate?*** For example, if you are required to submit EEOC reports, you probably need to complete the Ethnicity field so that you can easily generate reports using this data.

   - ***What kinds of information do I need to quickly access?*** Do you get asked whose certifications are expiring or who has not yet completed required training? If so, you can add this information to the system and quickly retrieve it "on the fly" by searching employee records.

NOTE: As stated earlier, you can "retrofit" your database by adding information to the database that your district previously did not track. Although this can be a time-consuming task, the Employee Management system allows you to do this because sometimes it is unavoidable after you have started using the system.

2. ***Prepare the system for use.*** After you decide what information you want to track, you need do the following tasks. You can view a specific checklist in The Employee Management Setup Checklist later in this chapter.

   - ***Review/Modify various lookup lists.*** You can use the prebuilt lookup list items or create your own.

   - ***Setup authorized users.*** You can set up permissions to control not only who has access to your database but what information they have access to.

   - ***Review/Modify district options.*** You can set up customized employee and accident report fields as well as check-in options (if you are using the Employee Check-In software).

Do I have to do any other setup tasks if I want to use the Employee Check-In software?

ⓘ *T.O.M Tip*   You can learn about setting up this software in *Chapter 3* of the *Getting Started* section. That chapter includes a checklist similar to the one in this chapter that is specific to that software.

3. ***Add employees to the system.*** Unlike preparing the system for use, this is not something you do only once. Rather, this is a regular task you perform as your district adds new employees.

What if I'm using the T.O.M. Field Trip Administration software?

ⓘ *T.O.M Tip*   If you are using the T.O.M. Field Trip Administration, you can use those databases for the Employee Management system. Because both software programs use the same database, you only have to add and update employee information in one place.

Keep in mind, however, that the Employee Management system allows you to track more information than you can add in the T.O.M. Field Trip Administration software. For this reason, you might need to edit employee records in the Employee Management system.

4. ***Add transactions such as training, reminders, absences, and accidents to employee records.*** Like employee records, this is an ongoing task that you will perform.

    You do not have to add these transaction records to the system as you add employees. Some of the transactions, like absences, are probably unique to each employee. Other transactions, however, might be common to a group of employees. This happens, for example, when all the drivers in your district attended an in-service meeting. Although you can add the training to individual employee records, it is much easier to add the training as group training; this enables you to create one transaction that is added to more than one employee record at a time.

5. ***Search employee records.*** You can search employee records as soon as you have added them to the system. Remember, you can only search using criteria that you have added to the system. For example, if you did not select the employee's ethnicity code when you added the employee records to the system, you will not be able to search using that criteria.

    The ability to effectively search records is one of the reasons that Gecko Microsolutions recommends that you spend time thinking about the type of information you want to track before you start using the system.

6. ***Update employee records.*** You can easily edit employee information at any time while you are using the system. The changes you make range from changing an employee's address to adding transaction records such as training, absences, reminders, and accident reports.

The Employee Management Setup Checklist

The checklist below contains tasks *in the order* that they must be performed before you can begin to use the Employee Management system on a day-to-day basis.

- Notice that not all the tasks are required. *Optional items may or may not pertain to your organization.*
- Next to each of these checklist items is a corresponding chapter number that gives more detailed information about that item.

The checklist is divided into three categories and in the order the tasks should be performed:

1. **Review/Modify Various Lookup Lists**

2. **Setup Authorized Users**

3. **Review/Modify District Options**

Task…	*Required or Optional?*	*Chapter*
1. Review/Modify Various Lookup Lists		
• Review / Modify Base Employee lookup lists		Chapter 4
» Ethnicity Codes	Required	
» Employee Types	Optional	
» Vehicle Types	Optional if not entering vehicles	
» Vehicles	Optional	
» Divisions	Optional	
» Departments	Optional	
» Statuses	Required	
• Review / Modify Reminder lookup lists		Chapter 5
» Reminder Categories	Required	
» Reminder Types	Required	
• Review / Modify Accident Report lookup lists		Chapter 6
» Accident Contributing Factors Codes	Optional	
» Accident In Use For Codes	Optional	
» Accident Types	Optional	
» Accident Injury Types	Optional	
» Accident Damage Types	Optional	
• Review / Modify Absence lookup lists		Chapter 7
» Absence Codes	Optional	
• Review / Modify Training lookup lists		Chapter 8
» Training Types	Optional	
» Training Codes	Optional	
2. Setup Authorized Users	Optional	Chapter 11
3. Review/Modify District Options		Chapter 12

Starting the Software

1. Click the Start button.

2. Select>All Programs>T.O.M>T.O.M. Employee Management>T.O.M. Employee Management.
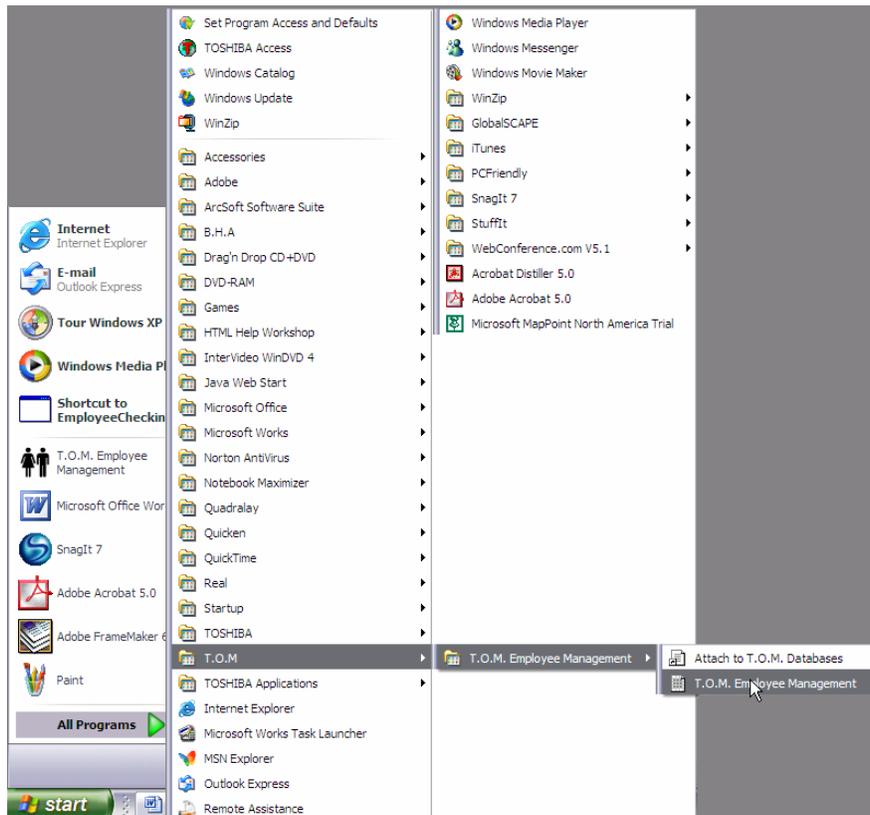
Figure 2-3. Starting the Employee Management system from your Windows Start button

OR

Click the Employee Management system shortcut on your desktop:

Figure 2-4. Desktop shortcus for the Employment Management system

Using the Employee Management System's Main Screen

The main screen of the Employee Management system is your home base(Figure 2-5). From this screen, you can access the various features of your T.O.M. software, which are explained in detail throughout this *Getting Started Manual* and in the *Users Guide*.

The Reminders tab is the default view of the Employee Management system main screen.

You can view the Employees, Training, Absences, and Accidents tabs by clicking on them.

Displays the number of records displayed.

Some tabs have search/sort subtabs similar to this.
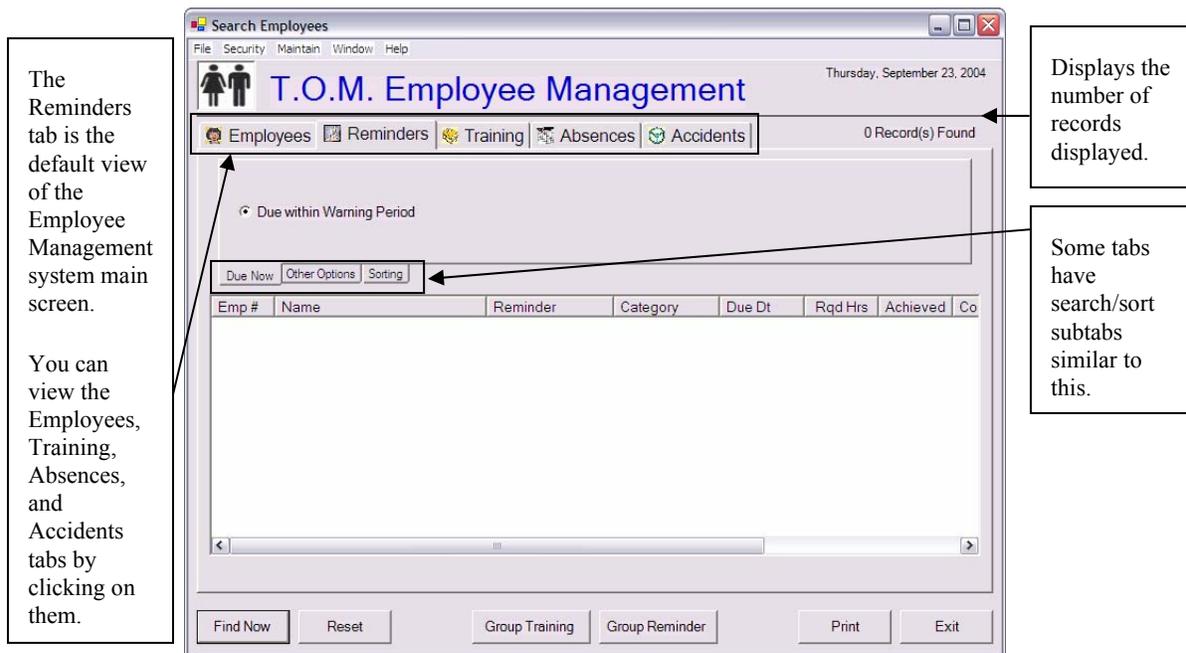
Figure 2-5. Main screen of the Employee Management system

- **Tabs:**
    - » **Employees.** Allows you to search for employee records as well as to add, edit, and delete employees from the system. You can learn more about this tab in *Chapter 2* of the *Users Guide*.
    - » **Reminders.** *(Default view of the main Employee Management system screen.)* Displays reminders for employees that are due within the warning system. You can learn more about reminders in *Chapter 2* of the *Users* section.
    - » **Training.** Allows you to search employee training records. Training is discussed in *Chapter 4* of the *Users* section.
    - » **Absences.** Allows you to search employee absences that have been added to the system. Absences are discussed in *Chapter 5* of the *Users* section.
    - » **Accidents.** Allows you search employee accident reports. Accident reports are discussed in *Chapter 5* of the *Users* section.
- **Search and Sort Subtabs.** *(Applicable to all the main tabs except Absences.)* Organizes additional options by category. For example, you will find sorting options on the Sorting subtab of the Reminders tab.
- **Buttons:**
    - » **Find Now.** Searches the database using the selected options on the different tabs.
    - » **Reset.** Clears any search / sort options and search results you might have made on any of the main tabs and gives you a fresh new search screen.

» **Group Training.** Allows you to add training for a group of employees to the system. Group training is discussed in *Chapter 4* of the *Users* section.

» **Group Reminder.** Allows you to enter a reminder for a group of employees. You can learn more about reminders in *Chapter 2* of the *Users* section.

» **Print.** Allows you to generate and print a report for the displayed data. You can learn more about reports in the *Chapter 13* of the *Users* section.

» **Exit.** Closes the application.

Sample Employee Record with Transactions

To help you better understand how this software works, this section shows you what a sample employee record looks like and the different types of transactions that can be added to it. After you add employee records to the system, you can use the main Employee Management screen to search for records and generate/print reports.

Employee Record, or Master Record

Employee records are the master records in the database. This master information is organized into three of the tabs in the Detailed Employee Screen:

- General
- Employment & License
- User

The following is a brief discussion of each of these screens with a demonstration employee being entered:

- **General.** Allows you to enter general name, address, contact and personal information about the employee (Figure 2-6).
- **Employment & License.** Allows you to enter more employment and driver license and certification information (Figure 2-7).
- **User Defined.** If you find that your district needs to track information that does not correspond to any fields in the T.O.M. Employee Management software, you can create custom fields that you can access on the User Defined tab (Figure 2-8).

Figure 2-6 shows a sample employee record with general employee information.

Figure 2-6. Sample employee, or master, record

Figure 2-7 shows the Employment & License information that has been added to the system:

Figure 2-7. Sample employment and license information

Figure 2-8 shows customized fields that have been added to the system:

Figure 2-8. Sample customized employee fields

Employee Transactions

You can add several types of transactions to employee records: Training, Absences, Reminders, Accidents, and Notes.

NOTE: You can search for information you added to the system on all transactions except Notes. While adding notes to the system allows you to input any time of information that doesn't "fit" on the other screens, you cannot search for notes. You can, however, search for an employee record and view notes you added to it.

Figure 2-9 shows that two training records, or transactions, have been added to the employee record:

Figure 2-9. Sample training records

Figure 2-10 shows that three absences have been added to the employee record:

Figure 2-10. Sample absences

Figure 2-11 shows reminders that have been added to the employee record:
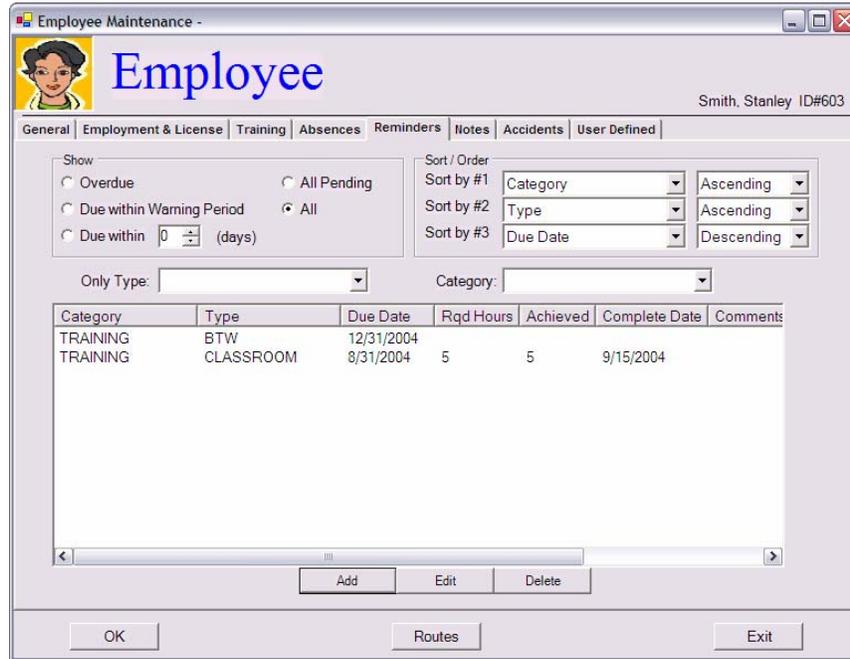
Figure 2-11. Sample reminders

Figure 2-12 shows a note that has been added to the employee's record:
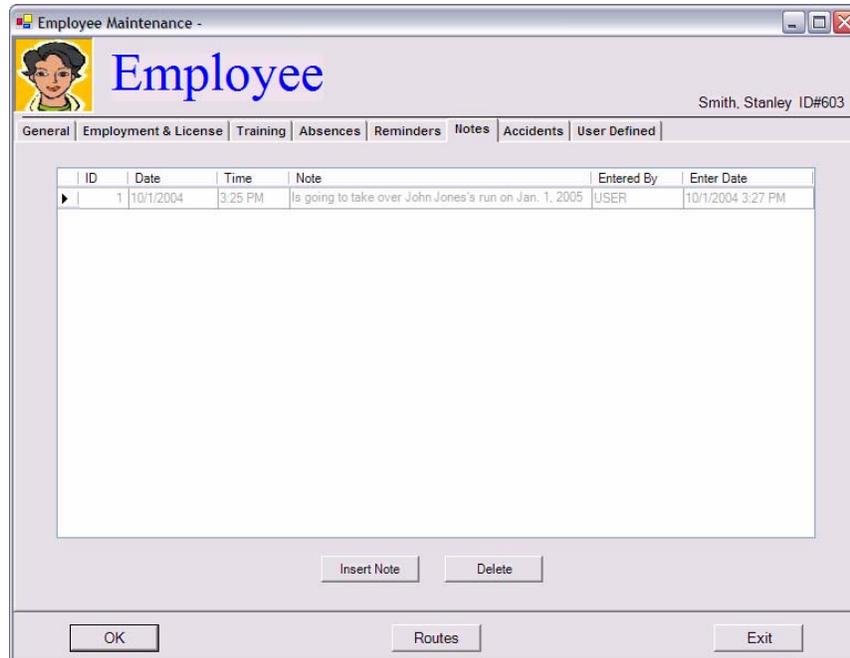
Figure 2-12. Sample notes

Sample Searches

The following searches are common searches you might need to perform. Keep in mind, however, that each search depends on the type of information you added to the system. For example, if you do not track absences, the first search listed below will not work.

If you need to know…	*then you need to select…*
which drivers were absent on Mondays and Fridays,	• *Driver* as the Employee Type on the Employees tab. • *Monday* and *Friday* on the Absence tab (Figure 2-13).
which employees attended classroom training last month,	• *Type* on the Training tab. • *Training Date falls between* on the Training tab (Figure 2-14).
which accidents have occurred on a particular street last year,	• *Addr/Location* on the Accidents tab. • *Accident Dt between* on the Accidents tab (Figure 2-15).

Searching for Drivers with Absences on Mondays and Fridays

Figure 2-13. Searching for drivers who have been absent on Mondays and Fridays

Employees Who Attended Training Last Month
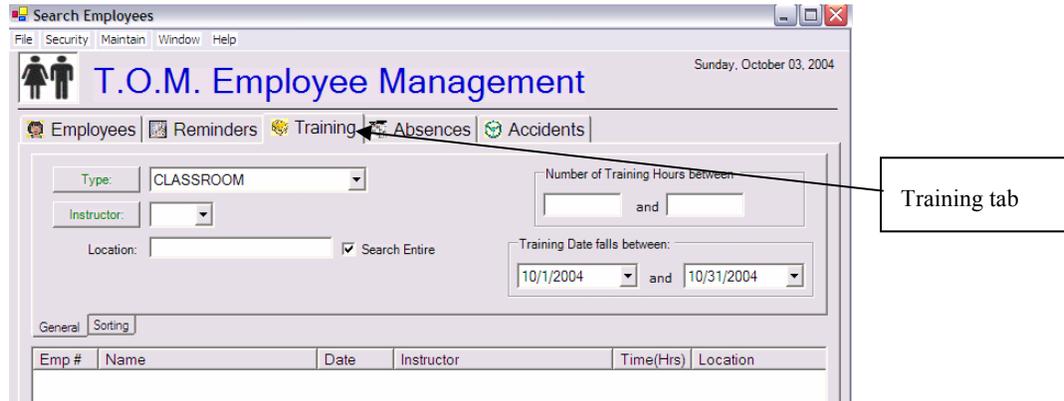
Figure 2-14. Searching for employees who attended training last month

Searching for Accidents on a Particular Street Last Year
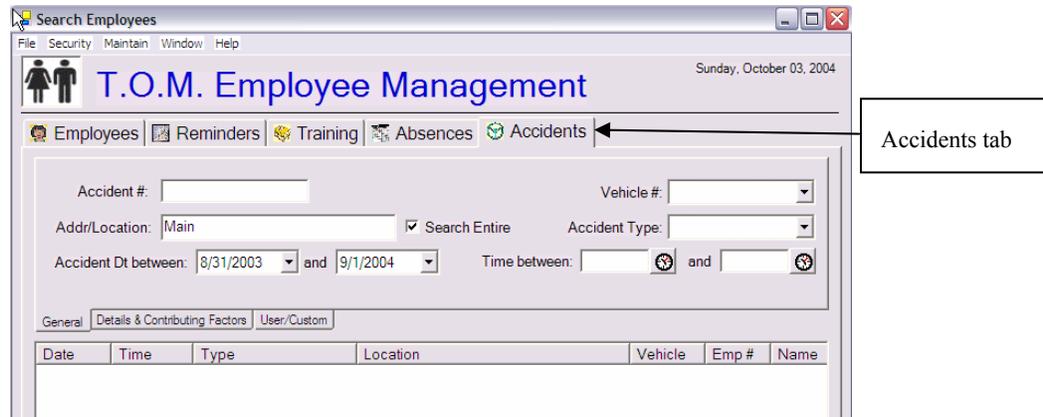
Figure 2-15. Searching for accidents that occurred on a particular street last year