Chapter 4

Employee Lookup Lists

The employee master file record allows you to assign various predefined attributes to your employees. These attributes appear in the software as lookup list in the employee information screen.

The T.O.M. Employee Management software ships with these lookup lists "predefined" so that you do not have to try and create them yourself. For example, if you are adding an employee named Stanley Smith to the Employee Management system, you can click the Employee Type pull-down arrow and select the Employee Type of *Driver*. Because the Employee Management system ships with many codes 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 these value. The following lookup lists contain attributes that you can assign to your employee records:

- Ethnicity Codes
- Employee Types
- Vehicle Types
- Vehicles
- Division/Garages
- Department
- Statuses

You can use these lookup lists to keep better records for you employees. These lookup lists also greatly assist you in searching and reporting on your various employees. For example, you could search for and view employee records for all my employees with Employee Type of *AID*. Almost all the lookup lists are optional, meaning you do not have to use them when entering your employee information.

Below is a detailed discussion of each of these Employee lookup lists. Each section tells you how to add codes as well as edit and delete existing codes.

Ethnicity Codes

Ethnicity Codes are meant to allow you to organize your employees into ethnic or racial groups if that function is needed by your organization. Some districts need to track this data for hiring and equal opportunity reporting.

- The Ethnicity code is only used to categorize your employees and can be used in your employee searching and reporting.
- The Ethnicity code is an optional value that you do NOT have to include in an employee's record.

This section explains the following:

- Adding a New Ethnicity Code
- Editing or Changing Ethnicity Codes to Inactive
- Deleting Ethnicity Codes

Adding a New Ethnicity Code

1. Select File>Other>Ethnicity Codes (Figure 4-1).
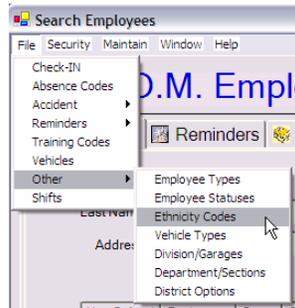
Figure 4-1. Selecting File>Other>Ethnicity Codes

The Employee Management system displays the Lookup Ethnicity Codes screen (Figure 4-2).
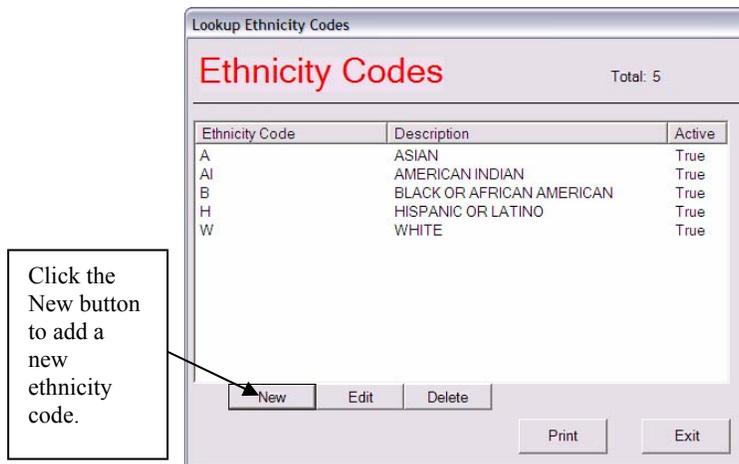
Figure 4-2. Lookup Ethnicity Codes screen

2. Click the New button. The Employee Management system displays the Ethnicity Code screen.

3. Type the ethnicity code and description (Figure 4-3).

- **Ethnicity Code.** 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 40 alphanumeric characters.
- **Active.** When selected, specifies that the ethnicity code can be assigned to employees.

4. Make sure the Active checkbox has a check in it. If it does not, the code will not appear in the Ethnicity pull-down list on the Employees screen. Figure 4-3 shows adding a code of O for Other:
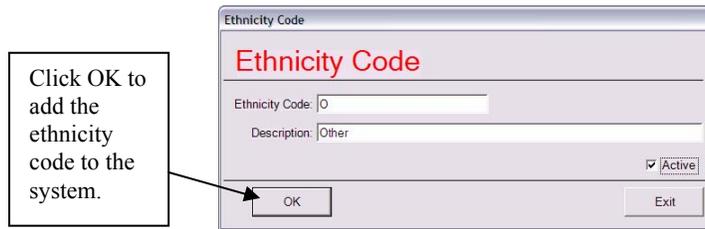

Figure 4-3. Adding a new ethnicity code

5. Click the OK button to add the ethnicity code to the system.

Editing or Changing Ethnicity Codes to Inactive

In addition to being able to edit ethnicity codes, you can change them to inactive. The advantage of changing the codes to inactive rather than deleting them is that the code still exists in the system but does not display in the Ethnicity pull-down list.

To edit an ethnicity code or change it to inactive:

1. To edit the ethnicity code or change it to inactive, select the code and click Edit, or double-click on it to display the Ethnicity Code screen (Figure 4-4).
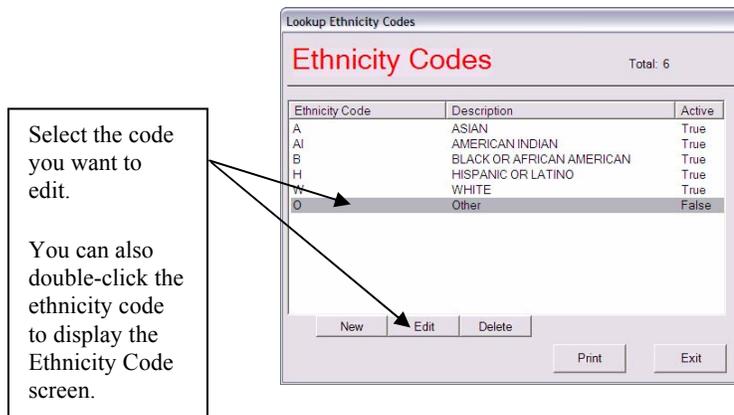

Figure 4-4. Selecting an ethnicity code

2. Make your changes to the screen. Figure 4-5 shows that the Other code has been changed to Inactive:

Figure 4-5. Changing an ethnicity code to Inactive

Deleting Ethnicity Codes

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

ⓘ *T.O.M Tip*	**I tried to delete an ethnicity code but couldn't. What am I doing wrong?** The database will not allow you to delete codes that have been assigned to employees. Therefore, if you have a code you don't want to use but still have it assigned to employees, you can either change the code for those employees and then delete the code, or you can change the code's status to inactive by making sure a checkmark does not appear in the Active checkbox on the Ethnicity Code screen.

To delete an ethnicity code:

1. Select the code you want to delete.

2. Click the Delete button (Figure 4-6).

Figure 4-6. Deleting an ethnicity code

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

3. Click the Yes button to delete the code.

Employee Types

Employee Types allow you to group and organize your workers into various job titles such as Driver or Mechanic. The T.O.M. Employee Management software uses the Employee Types to allow you to search and report on your various classification of employees. Using Employee Type, for example, you can ask the T.O.M. Software to find all your mechanics and show their training reminder records.

The Employee Type is a require attribute, meaning that all employees MUST be assigned an Employee Type.

This section explains the following:

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

Adding a New Employee Type

1. Select File>Other>Employee Types (Figure 4-7).
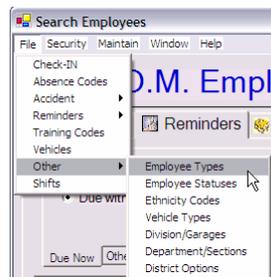
Figure 4-7. Selecting File>Other>Employee Types

The Employee Management system displays the Lookup Employee Types screen (Figure 4-8).
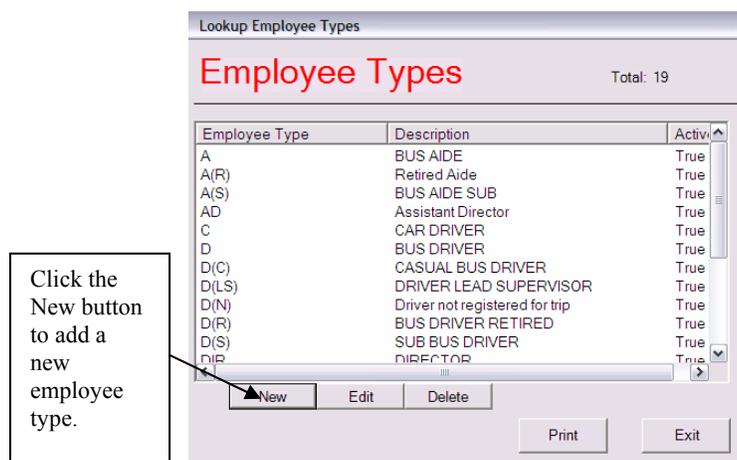
Figure 4-8. Lookup Employee Types screen

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

3. Type the employee type and description (Figure 4-9).

    - **Employee Type.** Allows you to enter up to 5 alphanumeric characters, meaning you can type both letters and numbers. This is a required field.
    - **Description.** Allows you to enter up to 30 alphanumeric characters.
    - **Active.** When selected, specifies that the employee type can be assigned to employees.

4. Make sure the Active checkbox has a check in it. If it does not, the code will not appear in the Employee Type pull-down list on the Employees screen. Figure 4-9 shows adding the employee Type of SpecEdD, or Special Ed Driver:

Figure 4-9. Adding a new employee type

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

Editing or Changing Employee Types to Inactive

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

To edit an employee type or change it to inactive:

1. To edit the employee type or change it to inactive, select it and click Edit, or double-click on it to display the Employee Type screen (Figure 4-10).
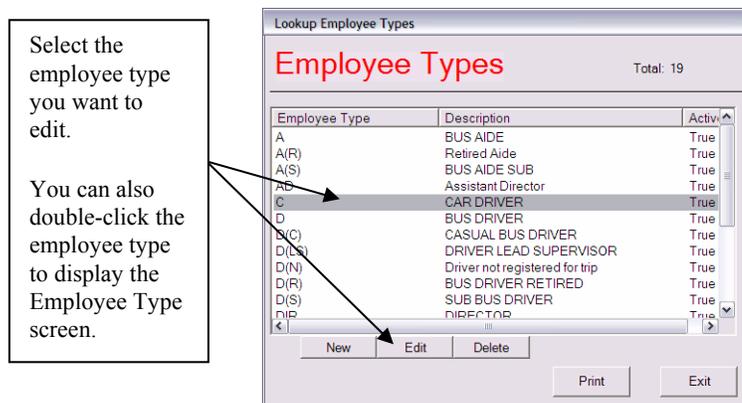
Figure 4-10. Selecting an employee type

2. Make your changes to the screen. Figure 4-11 shows that the Employee Type of C, or Car Driver, has been changed to Inactive:

Figure 4-11. Changing an employee type to Inactive

Deleting Employee Types

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

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

To delete an employee type:

1. Select the employee type you want to delete.

2. Click the Delete button (Figure 4-6).

Select the employee type you want to delete.

Then, click the Delete button.

You cannot delete employee types that have been assigned to employees.

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

Figure 4-12. Deleting an employee type

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

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

Vehicle Types

Vehicle types allow you to organize your various district buses, trucks, vans and cars into various groups such as Transit Bus and Handicap Bus). The T.O.M. Employee Management software uses the Vehicle Types to allow you not only organize and report your various vehicles by predefined types, but also to search and report on your employees based on the type of vehicle (if any) that they are assigned to (For example, show me all the drivers that are assigned to a Large Handicap Bus).

The Vehicle Type is a required attribute for your vehicles, meaning that all vehicles MUST be assigned a Vehicle Type.

This section explains the following:

*   Adding a New Vehicle Type
*   Editing or Changing Vehicle Types to Inactive
*   Deleting Vehicle Types

Adding a New Vehicle Type

1. Select File>Other>Vehicle Types (Figure 4-13).
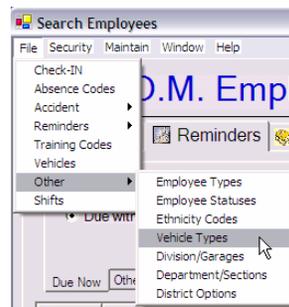
Figure 4-13. Selecting File>Other>Vehicle Types

The Employee Management system displays the Lookup Vehicle Type screen (Figure 4-14).
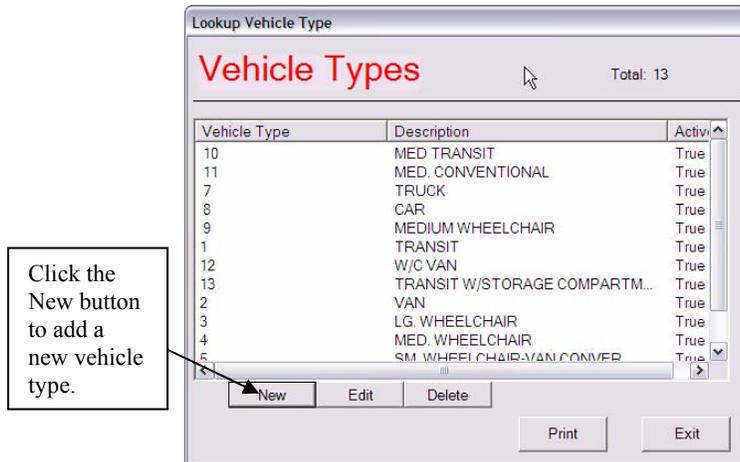
Figure 4-14. Lookup Vehicle Type screen

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

3. Type the vehicle type and description (Figure 4-15).

   - **Vehicle Type.** Allows you to enter up to 3 alphanumeric characters, meaning you can type both letters and numbers. This is a required field.

   - **Description.** Allows you to enter up to 30 alphanumeric characters.

   - **Active.** When selected, specifies that the vehicle type can be assigned to employees.

4. Make sure the Active checkbox has a check in it. If it does not, the code will not appear in the Vehicle Type pull-down list on the Employees screen.

   Figure 4-15 shows adding the vehicle type of O, or Other:
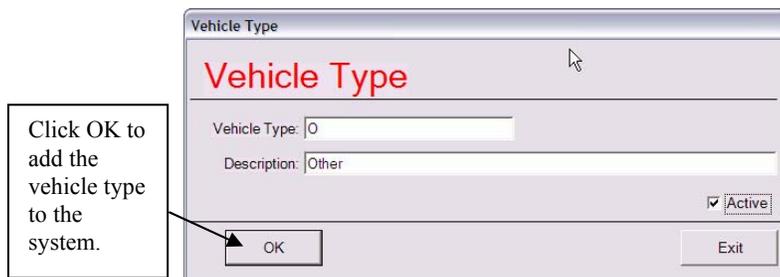
Figure 4-15. Adding a new vehicle type

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

Editing or Changing Vehicle Types to Inactive

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

To edit a vehicle type or change it to inactive:

1. To edit the vehicle type or change it to inactive, select it and click Edit, or double-click on it to display the Employee Type screen (Figure 4-16).
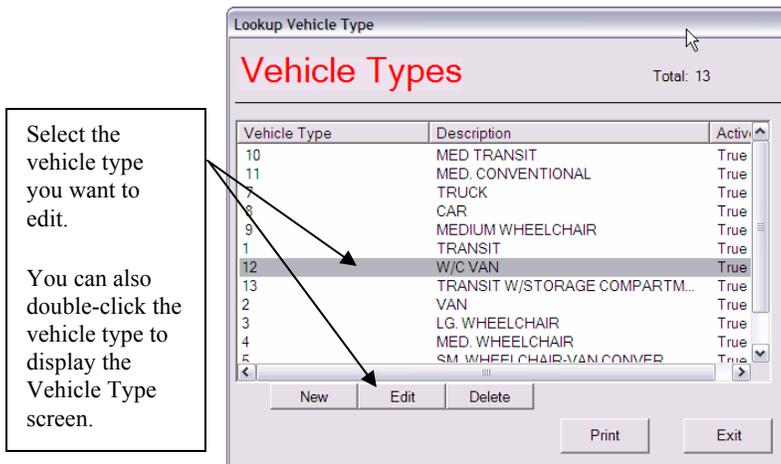

Figure 4-16. Selecting a vehicle type

2. Make your changes to the screen.

    Figure 4-17 shows that the Vehicle Type of 12, or W/C Van, has been changed to Inactive:
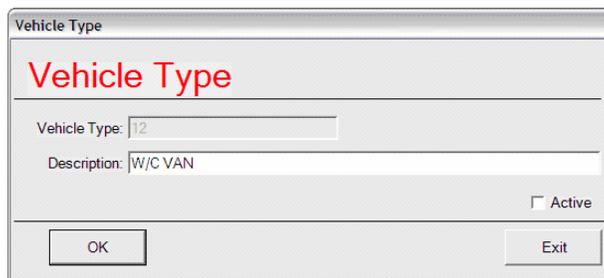

Figure 4-17. Changing a vehicle type to Inactive

Deleting Vehicle Types

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

ⓘ *T.O.M Tip*	**I tried to delete a vehicle type but couldn't. What am I doing wrong?** The database will not allow you to delete vehicle types that have been assigned to vehicles. Therefore, if you have an vehicle type you don't want to use but still have it assigned to vehicles, you can either change the vehicle type for those vehicles and then delete the vehicle type, or you can change the vehicle type's status to inactive by making sure a checkmark does not appear in the Active checkbox on the Vehicle Type screen.

To delete a vehicle type:

1. Select the vehicle type you want to delete.

2. Click the Delete button (Figure 4-6).

Figure 4-18. Deleting a vehicle type

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

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

Vehicles

Vehicles allow you to maintain a list of all the vehicles in your organization's fleet (example: Bus 102, Van 20). Vehicles also allow you to document what vehicles (if any) an employee is assigned to. After assigning your employees to various vehicles, you can search and report on your employees by the type of vehicle they are assigned to.

This section includes the following:

- Adding a Vehicle
- Editing or Changing Vehicles to Inactive
- Deleting Vehicles

Adding a Vehicle

1. Select File>Vehicles (Figure 4-19).
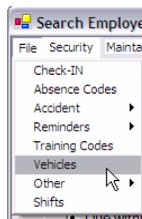
Figure 4-19. Selecting File>Vehicles

The Employee Management system displays the Lookup Vehicles screen (Figure 4-20).
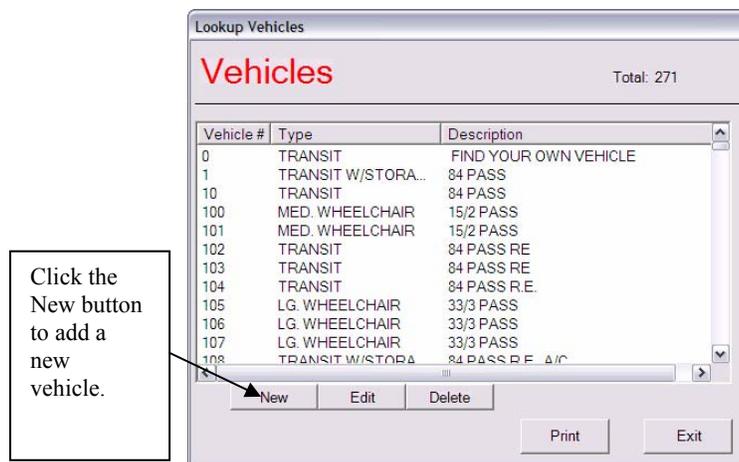

Figure 4-20. Lookup Vehicles screen

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

3. Complete the screen (Figure 4-21). You are only required to complete the Vehicle # field.

- **Vehicle #.** Allows you to enter up to 20 alphanumeric characters, meaning you can type both letters and numbers. This is a required field.

- **Vehicle Type.** Allows you to select a vehicle type from the lookup list. Adding vehicle types was discussed previously in this chapter. This is a required field.

- **Description.** Allows you to enter up to 30 alphanumeric characters.

- **License.** Allows you to enter up to 8 characters for the vehicle's license number.

- **Fuel Type.** Allows you to enter one character for the fuel type's abbreviation.

- **Year of Manufacture.** Allows you to enter the year the vehicle was manufactured. You can type the year or click the arrows to select it.

- **Vehicle Make.** Allows you to enter the vehicle's make.

- **Total Miles.** Allows you to enter the vehicle's mileage.

- **Active.** When selected, specifies that the ethnicity code can be assigned to employees.

4. Make sure the Active checkbox has a check in it. If it does not, the code will not appear in the Vehicle pull-down list on the Employees screen.

   Figure 4-21 shows adding a vehicle to the system:

Figure 4-21. Adding a new vehicle

5. Click the OK button to add the vehicle to the system.

Editing or Changing Vehicles to Inactive

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

To edit a vehicle or change it to inactive:

1. To edit the vehicle or change it to inactive, select the code and click Edit, or double-click on it to display the Vehicle screen (Figure 4-22).
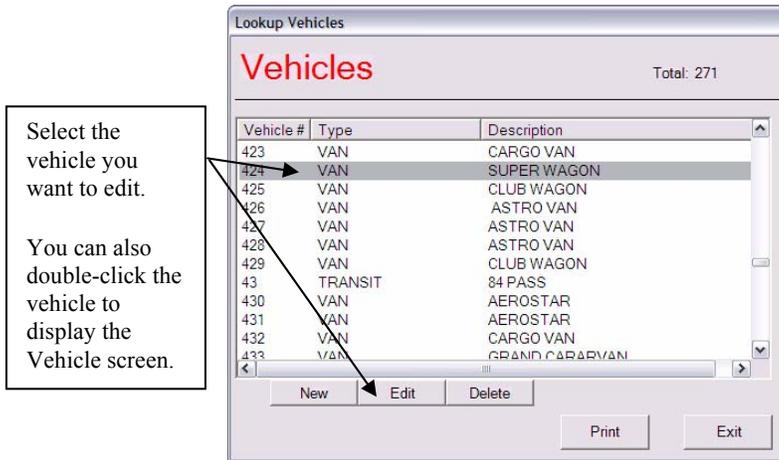
Figure 4-22. Selecting a vehicle

2.   Make your changes to the screen.

Figure 4-23 shows that Vehicle 424 has been changed to Inactive:
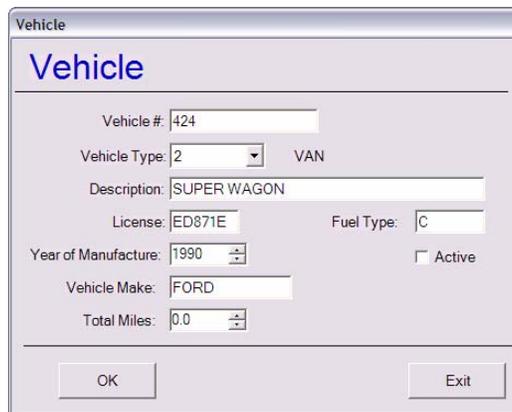
Figure 4-23. Changing a vehicle's status to Inactive

Deleting Vehicles

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

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

To delete a vehicle:

1. Select the vehicle you want to delete.

2. Click the Delete button (Figure 4-6).

Select the code you want to delete.

Then, click the Delete button.

You cannot delete vehicles that have been assigned to employees.

Either change the vehicles assigned to those employees and then delete the vehicle, or select the code, and click Edit. Make sure a checkmark does not appear in the Active checkbox.
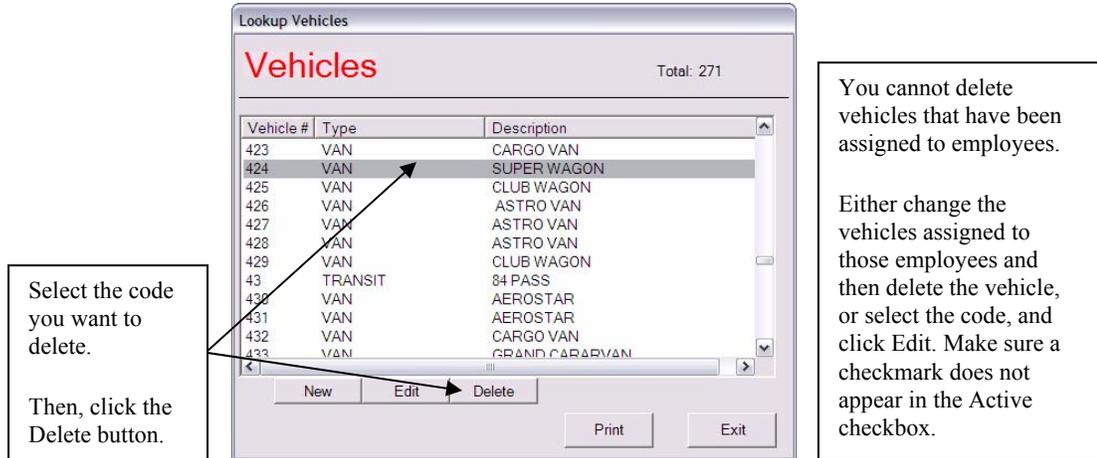
Figure 4-24. Deleting a vehicle

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

3. Click the Yes button to delete the vehicle.

Division/Garages

Divisions/Garages allow you to maintain a list of your various physical facilities or major work areas for your organization (example: South Garage, West Yard). Many school districts have more than one bus garage, for example, and they need to keep track of which employee is assigned to which garage. The Division / Garage attribute allows you to do this.

This section explains the following:

*   Adding a New Division or Garages
*   Editing or Changing Division/Garages to Inactive
*   Deleting a Division/Garage

Adding a New Division or Garages

1. Select File>Other>Division/Garages (Figure 4-25).
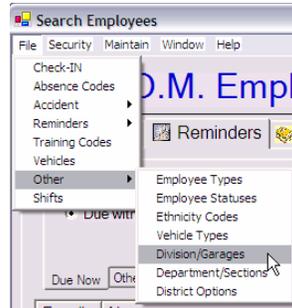

Figure 4-25. Selecting File>Other>Division/Garages

The Employee Management system displays the Lookup Division/Garages screen (Figure 4-26).

Click the New button to add a new division or garage.
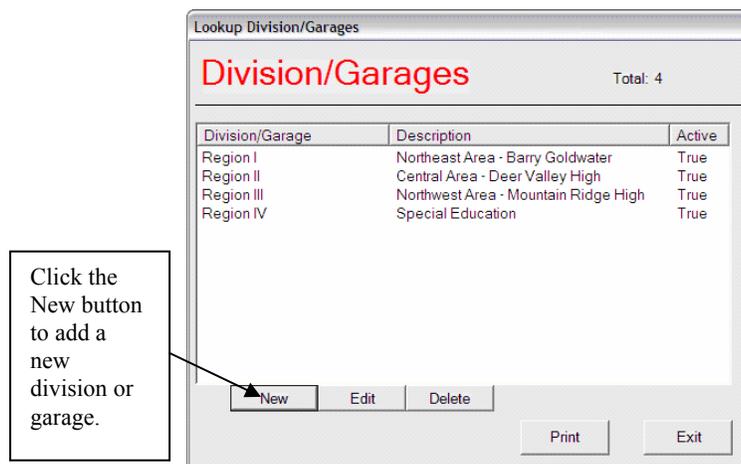
Figure 4-26. Lookup Division/Garages screen

2. Click the New button. The Employee Management system displays the Division/Garage screen.

3. Type the division/garage code and description (Figure 4-27).

    *   **Division/Garage.** Allows you to enter up to 15 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 division/garage can be assigned to employees.

4. Make sure the Active checkbox has a check in it. If it does not, the code will not appear in the Division/Garage pull-down list on the Employees screen.

Figure 4-27 shows adding the Region VI division which is the Southeast area, MLK High.

Click OK to add the division or garage to the system.
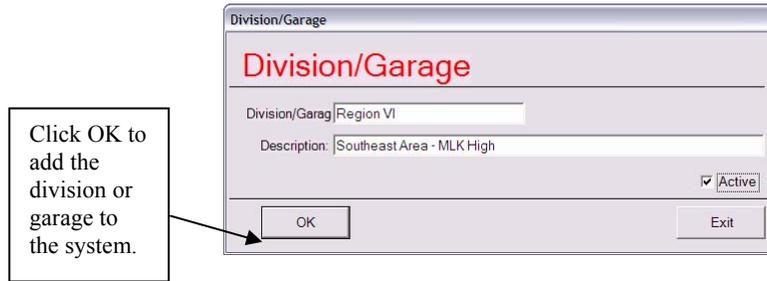
Figure 4-27. Adding a new division or garage

5. Click the OK button to add the ethnicity code to the system.

Editing or Changing Division/Garages to Inactive

In addition to being able to edit division/garages, you can change them to inactive. The advantage of changing the division/garages to inactive rather than deleting them is that the code still exists in the system but does not display in the Division/Garages pull-down list.

To edit division/garage or change it to inactive:

1. To edit the division/garage or change it to inactive, select it and click Edit, or double-click on it to display the Division/Garage screen (Figure 4-28).

Select the division/garage you want to edit.

You can also double-click the code to display the Division/Garage screen.
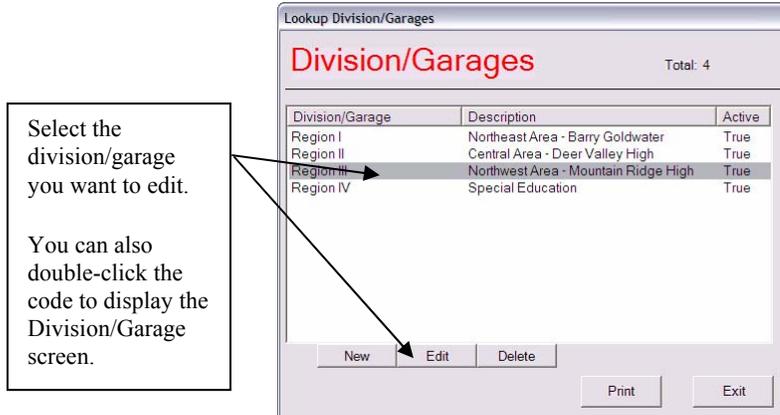
Figure 4-28. Selecting a division/garage

2. Make your changes to the screen.

   Figure 4-29 shows that the Region III code has been changed to Inactive:

Figure 4-29. Changing a division/garage to Inactive

Deleting a Division/Garage

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

I tried to delete a division/garage but couldn't. What am I doing wrong?

ⓘ *T.O.M Tip*

The database will not allow you to delete a division/garage that has been assigned to employees. Therefore, if you have a division/garage you don't want to use but still have it assigned to employees, you can either change the division/garage for those employees and then delete it, or you can change the its status to inactive by making sure a checkmark does not appear in the Active checkbox on the Division/Garage screen.

To delete a division/garage:

1. Select the division/garage you want to delete.

2. Click the Delete button (Figure 4-6).

Select the division/garage you want to delete.

Then, click the Delete button.

You cannot delete a division or garage that has been assigned to employees.

Either change the division or garage assigned to those employees and then delete it, or select the code, and click Edit. Make sure a checkmark does not appear in the Active checkbox.

Figure 4-30. Deleting a division or garage

The Employee Management system asks if you are sure to want to delete the division/garage.

3. Click the Yes button to delete it.

Department/Section

Department/Section is another way (along with Division/Garage) for you to organize what functional area your employees work in (example: Transportation, Maintenance, Planning, Dispatching). Larger school districts may have their employees organized into sections or departments that they need to report on, and this attribute allows you to do that.

This section explains the following:

- Adding a New Department/Section
- Editing or Changing Department/Section to Inactive
- Deleting Departments/Sections

Adding a New Department/Section

1. Select File>Other>Ethnicity Codes (Figure 4-31).
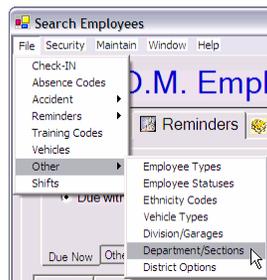
Figure 4-31. Selecting File>Other>Departments/Sections

The Employee Management system displays the Lookup Ethnicity Codes screen (Figure 4-2).

Click the New button to add a department/ section.
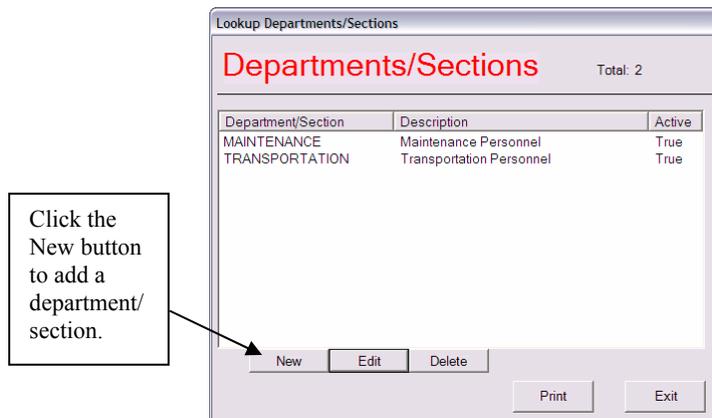
Figure 4-32. Lookup Deparments/Sections screen

---

2. Click the New button. The Employee Management system displays the Department/Section screen.

3. Type the department/section code and description (Figure 4-3).

    *   **Department/Section.** 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 department/section can be assigned to employees.

4. Make sure the Active checkbox has a check in it. If it does not, the code will not appear in the Division/Section pull-down list on the Employees screen. Figure 4-33 shows adding a code of O for Other:

Click OK to add the department/ section to the system.
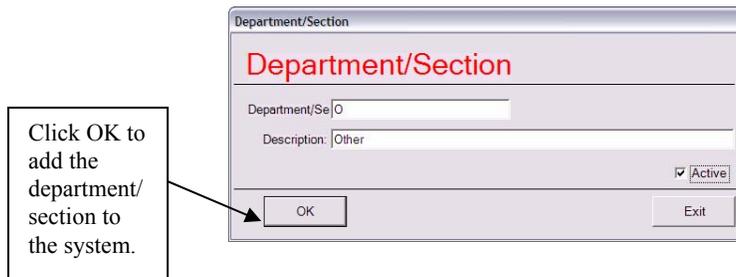
Figure 4-33. Adding a new department/section

5. Click the OK button to add the department/section to the system.

Editing or Changing Department/Section to Inactive

In addition to being able to edit departments and sections, you can change them to inactive. The advantage of changing the codes to inactive rather than deleting them is that the code still exists in the system but does not display in the Division/Section pull-down list.

To edit a department/section or change it to inactive:

1. To edit the department/section or change it to inactive, select it and click Edit, or double-click on it to display the Department/Section screen (Figure 4-34).

Select the department or section you want to edit.

You can also double-click the division or section to display the Division/Section screen.
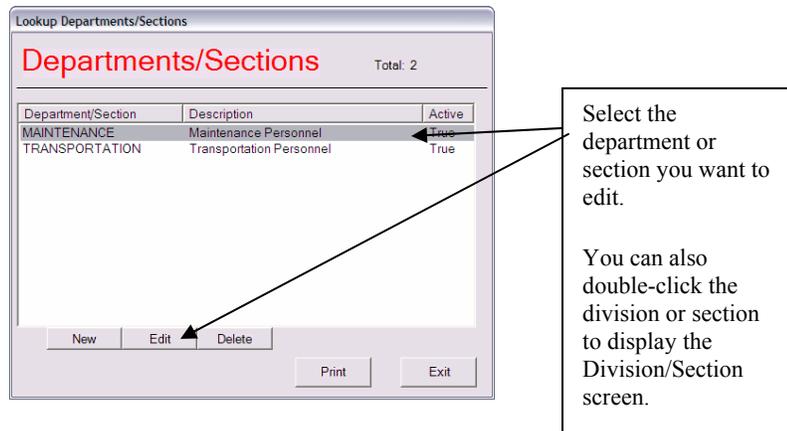
Figure 4-34. Selecting a department/section

2. Make your changes to the screen.

   Figure 4-35 shows that the Maintenance code has been changed to Inactive:

Figure 4-35. Changing department/section to Inactive

Deleting Departments/Sections

If you delete a department or section, 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 department but couldn't. What am I doing wrong?** The database will not allow you to delete departments or sections that have been assigned to employees. Therefore, if you have a code you don't want to use but still have it assigned to employees, you can either change the department/section for those employees and then delete it, or you can change its status to inactive by making sure a checkmark does not appear in the Active checkbox on the Department/Section screen.

To delete a department/section:

1. Select the department/section you want to delete.

2. Click the Delete button (Figure 4-6).

Figure 4-36. Deleting department/section

The Employee Management system asks if you are sure to want to delete the division or section.

3. Click the Yes button to delete it.

Statuses

Status allows you to document the various statuses (such as retired, terminated, or on probation) that an employee may be in your organization.

The T.O.M. Employee Management software uses this status field to allow you to document exactly what an employee's position with your organization is. The T.O.M. Employee Management software also comes with an Active Checkbox on each employee's record. By either checking or unchecking the Active checkbox, you can quickly indicate if the employee is active or inactive. However, many times you need to be a bit more specific of exactly how the employee is active or inactive (for example. Active--probation, Inactive--suspension). The T.O.M. software then allows you to search and report on your employees based on this more specific state of activity.

- Adding a New Status
- Editing or Changing Employee Statuses to Inactive
- Deleting Employee Statuses

Adding a New Status

1. Select File>Other>Employee Statuses (Figure 4-37).
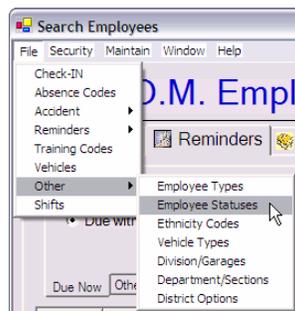
Figure 4-37. Selecting File>Other>Employee Statuses

The Employee Management system displays the Employee Statuses screen (Figure 4-38).

Click the New button to add a new employee status.
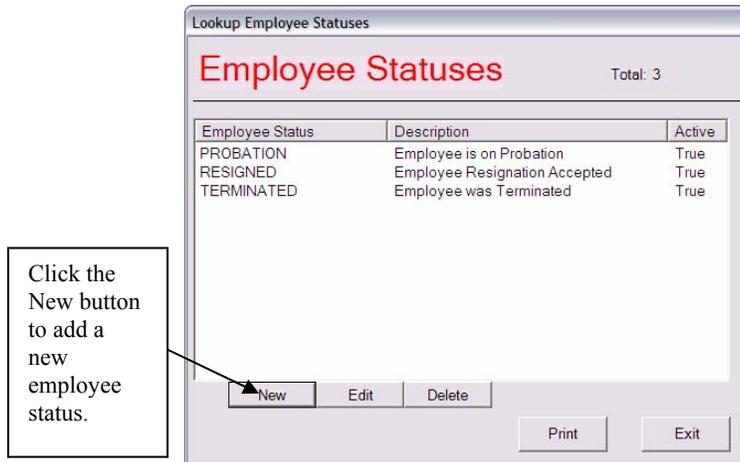
Figure 4-38. Lookup Employee Statuses screen

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

3. Type the ethnicity code and description (Figure 4-39).

    -   **Employee Status.** 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 employee status can be assigned to employees.

4. Make sure the Active checkbox has a check in it. If it does not, the status will not appear in the Status pull-down list on the Employees screen. Figure 4-39 shows adding a status of Resignation Pending:

Click OK to add the employee status to the system.

Figure 4-39. Adding a new employee status

5. Click the OK button to add the employee status to the system.

Editing or Changing Employee Statuses to Inactive

In addition to being able to edit the employee status, you can change it to inactive. The advantage of changing it to inactive rather than deleting it is that the code still exists in the system but does not display in the Status pull-down list.

To edit an employee status or change it to inactive:

1. To edit the employee status or change it to inactive, select the code and click Edit, or double-click on it to display the Ethnicity Code screen (Figure 4-40).

<table>
<tr><td colspan="3">Lookup Employee Statuses</td></tr>
<tr><td colspan="2">**Employee Statuses**</td><td>Total: 3</td></tr>
<tr><td>Employee Status</td><td>Description</td><td>Active</td></tr>
<tr><td>PROBATION</td><td>Employee is on Probation</td><td>True</td></tr>
<tr><td>RESIGNED</td><td>Employee Resignation Accepted</td><td>True</td></tr>
<tr><td>TERMINATED</td><td>Employee was Terminated</td><td>True</td></tr>
</table>

Select the status you want to edit.

You can also double-click the status to display the Employee Status screen.

New   Edit   Delete

Print   Exit
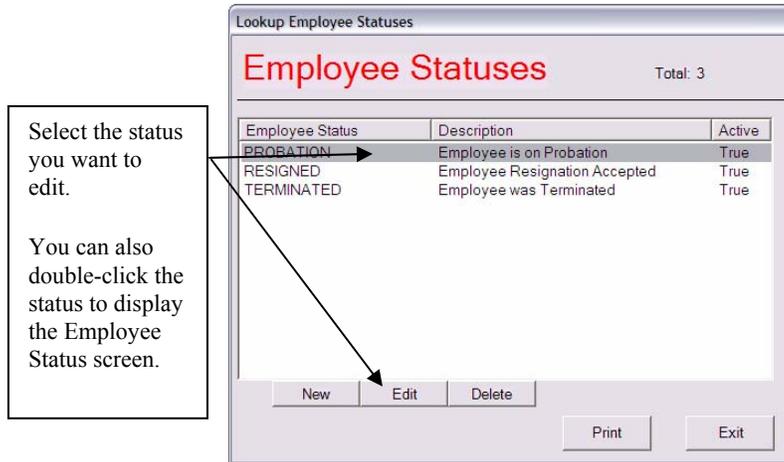
Figure 4-40. Selecting an employee status

2. Make your changes to the screen. Figure 4-5 shows that the Probation status has been changed to Inactive:

Employee Status

Employee Status

Employee Stat PROBATION

Description: Employee is on Probation

☐ Active

OK   Exit
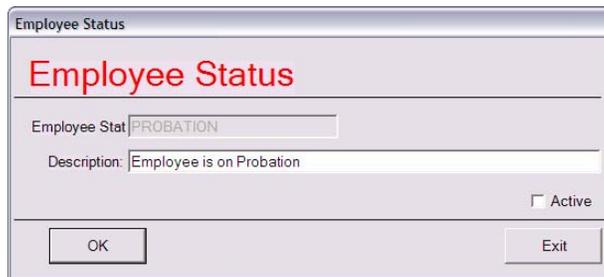
Figure 4-41. Changing an employee status to Inactive

Deleting Employee Statuses

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

ⓘ *T.O.M Tip*

I tried to delete an employee status but couldn't. What am I doing wrong?

The database will not allow you to delete statuses that have been assigned to employees. Therefore, if you have a status you don't want to use but still have it assigned to employees, you can either change the status for those employees and then delete it, or you can change the status to inactive by making sure a checkmark does not appear in the Active checkbox on the Employee Status screen.

To delete an employee status:

1. Select the employee status you want to delete.

2. Click the Delete button (Figure 4-6).
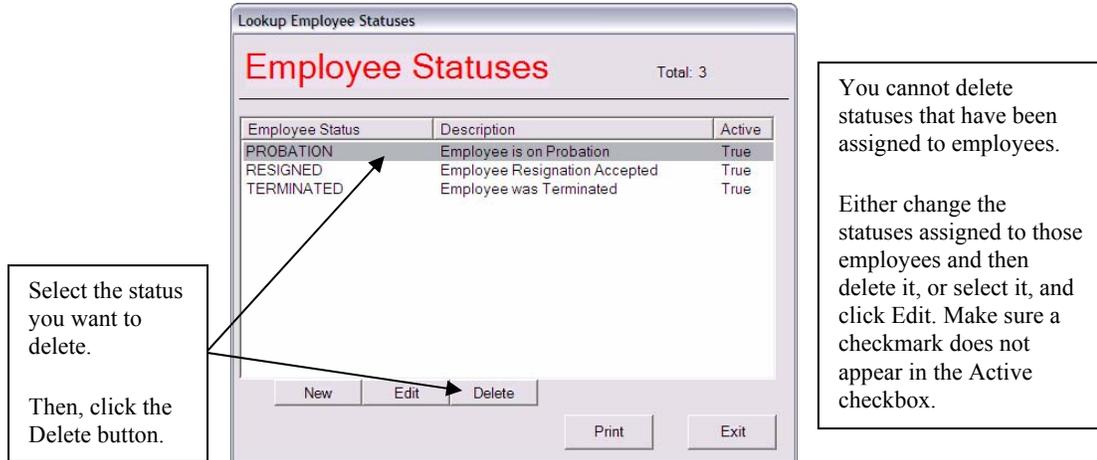
Figure 4-42. Deleting an employee status

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

3. Click the Yes button to delete the status.