

Chapter 13

Working with Reports

Gecko Microsolutions, Inc., takes reports very seriously. We know that many times a software program is only as good as the reports that our customers can get from it. Reports are even more challenging in Employee Management because of the incredible variety of information contained in the database. Adding to this challenge is the fact that different organizations require different types of reports to fit different circumstances. All of these challenges add up to a demand that requires more than a handful of “canned” reports that a user can choose from. Gecko’s approach to reports for our products is to provide five major design goals of our products reporting feature:

1. To have as many attractive, easy-to-read, and comprehensive “off the shelf” reports as possible.
2. To place these reports in the same screens that the users use to lookup and retrieve the information they want to report on.
3. To give the user the maximum control of the information selection and sorting for these reports as possible.
4. To allow the reports to be exported to a variety of formats like word process or spreadsheet files to allow the user tailor the look and content of a report using a variety of software tools.
5. To allow the use to create and customize new reports that can be run from the software. *(To learn more about this optional feature see Chapter 14 – The T.O.M. Report Customization Optional Feature)*

Many Easy-to-Read Reports, Placed Where You Need Them

The T.O.M. Employee Management software ships packed full of easy-to-read and comprehensive reports. Unlike other software programs, the T.O.M. Employee Management software doesn’t make you leave your search screen and run reports from a special reports menu. Instead, the reports are put right where you need them in the screens where you are actually looking at and working with the information.

For example, suppose you are searching for all employees with an employee type of Driver who have a birthday this month and you want to print the search results. All you need to do is click on a Print button in the Employee Search Screen rather than leaving that screen and going to a special report screen and then re-entering your search criteria for the report.

The Employee Management Reports are grouped into seven categories:

1. Employee Reports
2. Reminder Reports
3. Absence Reports
4. Training Reports



- 5. Accident Reports
- 6. Notes Reports
- 7. Check-In Reports
- 8/ Lookup List Reports

Each of these reporting areas will be discussed in more detail later in this chapter. (**NOTE: you view a printed example of every 'of the shelf' report available in the T.O.M. Employee Management software in Appendixes – A.1 – A.8 later in this book.**)

Giving You Control of What Information is on the Reports and How Its Sorted

As you have discovered, the T.O.M. Employee Management software has many powerful search screens that allow you to lookup exactly the information you need in the way you need it. Gecko has linked all the reporting so that your reports will obey the searching criteria you have entered giving you maximum control of what information will appear on your reports. In many cases, you can also dictate the sort order of your search results. Many of the reports available to you will use this sort order when printing the information. (Some reports by design require a certain type of sort order and will, therefore, not use the sort order you have specified). This chapter includes detailed examples later on how a user can control what information is selected to appear on a report and in some cases how the sort order of that information can be controlled as well.

The T.O.M. Report Preview Screen and Exporting Reports to Other File Formats

The T.O.M. Employee Management software allows you to preview all of your reports on your computer screen before you decide if you want to actually print the report to paper. This preview screen gives you many handy features to allow you to look over your report thoroughly before printing it. While in this preview mode, you can choose to save your report to a file like a word processing file or a spreadsheet file to allow you to modify the look and content of your report using a variety of other software programs.

Previewing Reports

After you select the type of report you want to generate and click the Print button, the Employee Management system generates and displays the report preview.

A partial report preview looks similar to Figure 13-1:

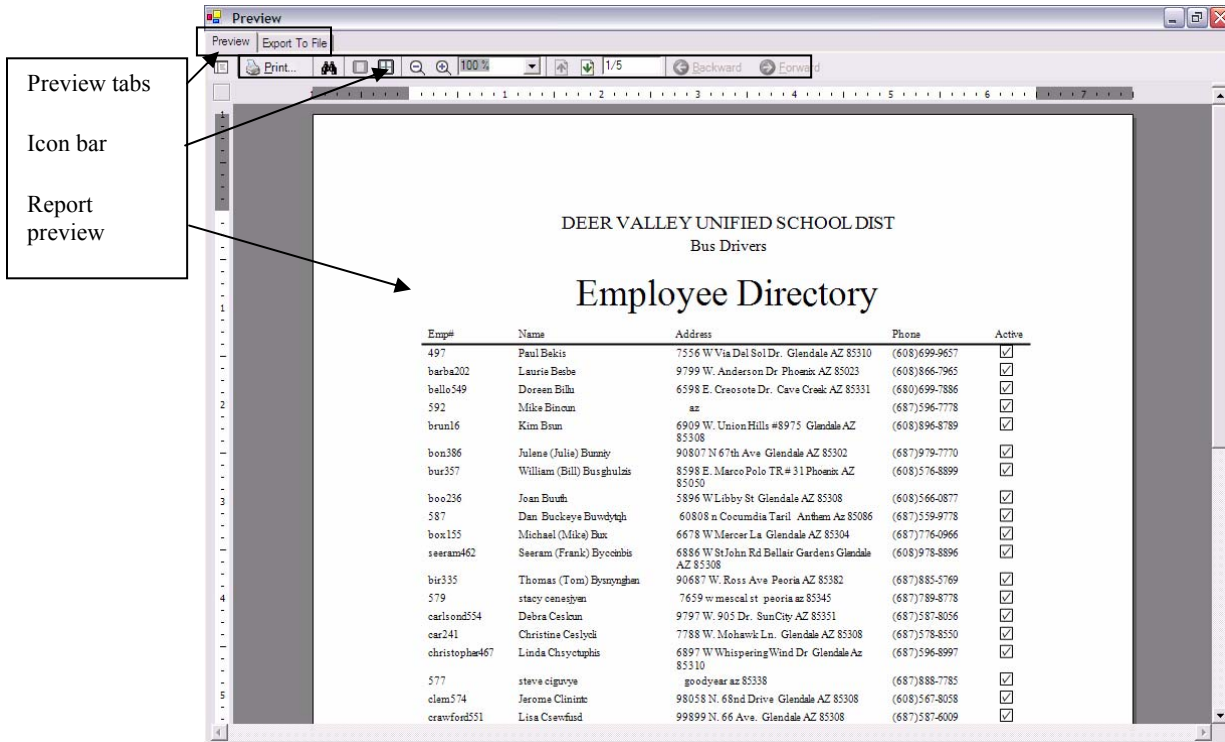


Figure 13-1. Previewing a report

There are two tabs in the report preview:

- Preview Tab
- Export to File Tab



Preview Tab

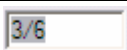
The Preview tab contains an icon bar that allows you to navigate through the report, change your report view, search the report, and print it.

Navigating Through the Report

There are several ways you can navigate around the report:

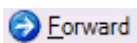
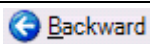


Click this icon to view the previous or next page in the report. For example, if you are on page 2 and click the up arrow icon, page 1 of the report displays.



This box displays the current page number and the total number of pages.

You can display a different page by clicking the arrows or by typing the page number into this box. For example, if you want to view page 4 of this report, you only need to type **4** into the box. You do not need to type **4/6**.

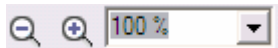


As you view pages, the preview “remembers” the order of the pages you have viewed. The Backward and Forward buttons allow you to navigate through the pages you have viewed in the order you viewed them. These buttons work the same way that the Back and Forward buttons work in a web browser.

Changing Your View of the Report

You can change your view of the report by zooming in or on it, or you can change the view by viewing one or multiple pages at a time.

Zooming in or out:



To change your zoom on the report, you can:

- Click the zoom in or zoom out icons.
- Type a different zoom value into the box and press Enter.



Viewing one or multiple pages:



- The first icon displays one report page at a time. This is the default view.
- The second icon allows you to view more than one page at a time; this is the multiple page view. When you click on this icon, a popup icon bar displays:

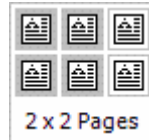


Figure 13-2. Selecting a multiple page view option

As you move your cursor over the popup icon bar, you will see a description display at the bottom of it. In the example above, the icon was placed over the second icon in the second row, and the description for this icon is 2 x 2 pages, meaning that you will be viewing 2 rows and 2 columns of report pages. Figure 13-3 shows how this looks:

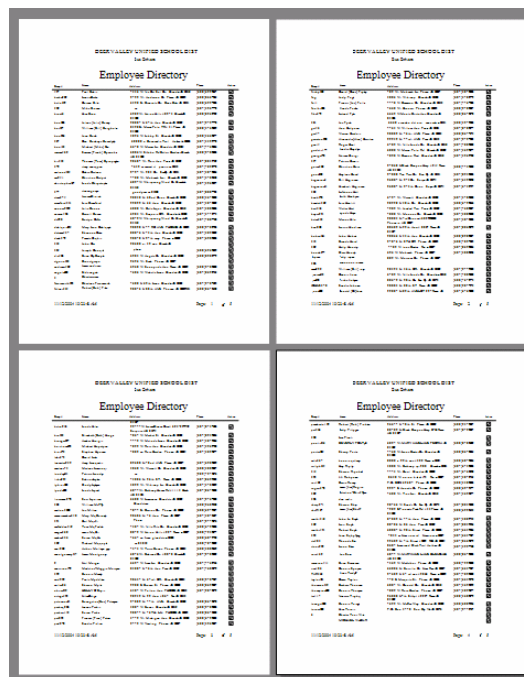



Figure 13-3. Viewing multiple report pages

NOTES:

- *If you change the zoom setting while viewing multiple pages, the view option changes back to the single page view.*
- *If you double-click on a page, the view option changes back to the single page view.*
- *You can use the up/down arrow and Backward/Forward icons without reverting back to the single page view.*



Searching the Report

1. Click the  icon. The Find dialog appears.
2. Type what you want to find into the Find what box (Figure 13-4).

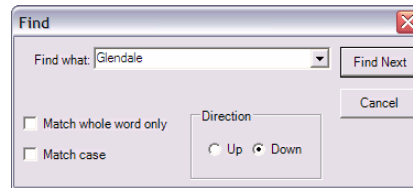


Figure 13-4. Find dialog

3. Click the Find Next button. If the Employee Management system finds what you typed into the Find what box, it highlights it:


Emp#	Name	Address	Phone	Active
497	Paul Bekis	7556 W Via Del Sol Dr Glendale, AZ 85023	(608)699-9657	<input checked="" type="checkbox"/>
barbs202	Laurie Barbe	9799 W. Anderson Dr Phoenix, AZ 85023	(608)866-7965	<input checked="" type="checkbox"/>

The found text is highlighted

Figure 13-5. Searching reports

Printing the Report

To print the report:

1. Click the  **Print...** icon.
2. Select your print options just as you would for any other document you print from your computer.
3. Click the OK button to print the report.

Export to File Tab

If you want to save the report data, you can export it to a file so that the report information can be viewed in another application.

- **Excel.** This options exports the file so that you can open it in Microsoft Excel.
- **RTF.** This is a format that is compatible with Microsoft Word, meaning that you can open an exported RTF file in Word.
- **HTML.** This is a format this can be opened with any web browser.
- **PDF.** This is a format that is compatible with Adobe Acrobat Reader.
- **Text.** You can open text files in many different software applications, including (but not limited to) Word, Excel, NotePad, and WordPad.



To export the report to a file:

1. Select the Export to File tab in the Preview screen (Figure 13-7):



Figure 13-6. Selecting the Export to File tab

2. Click in the Export to File checkbox. After you do that, you will be able to type the name you want to save the file as and to select the export file type.

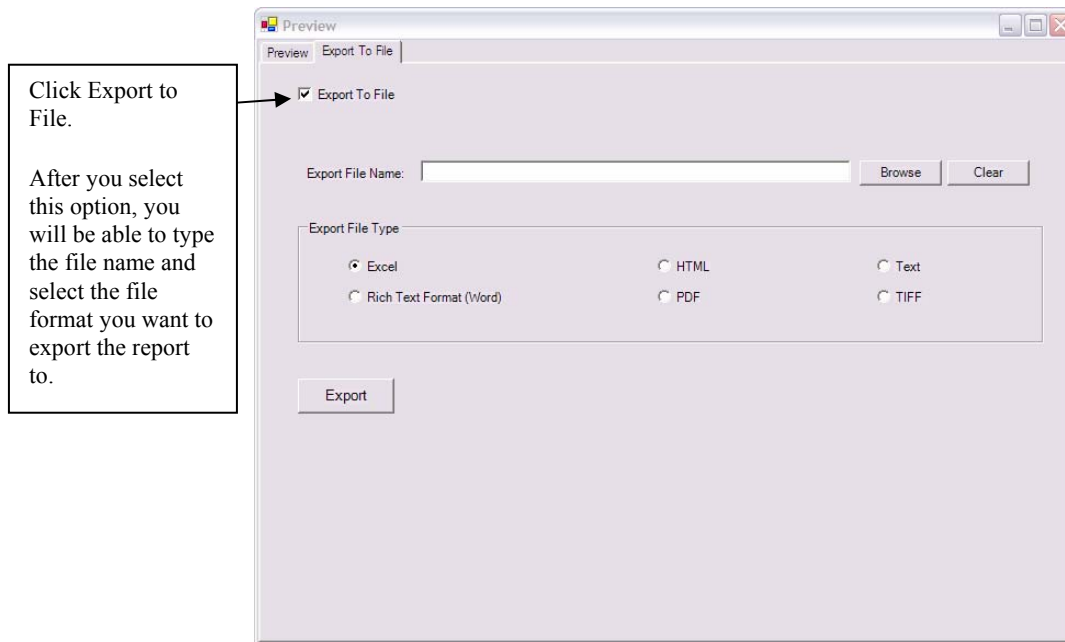


Figure 13-7. Export to File tab

3. Select the export file format. In this example, Excel has been selected. The reason you select this first is that when you select the file location and file name, it adds the correct file extension for you.
4. Click the Browse button.
5. Navigate to where you want to save the file (Figure 13-8).
6. Type the name you want to file as in the File name box (Figure 13-8).

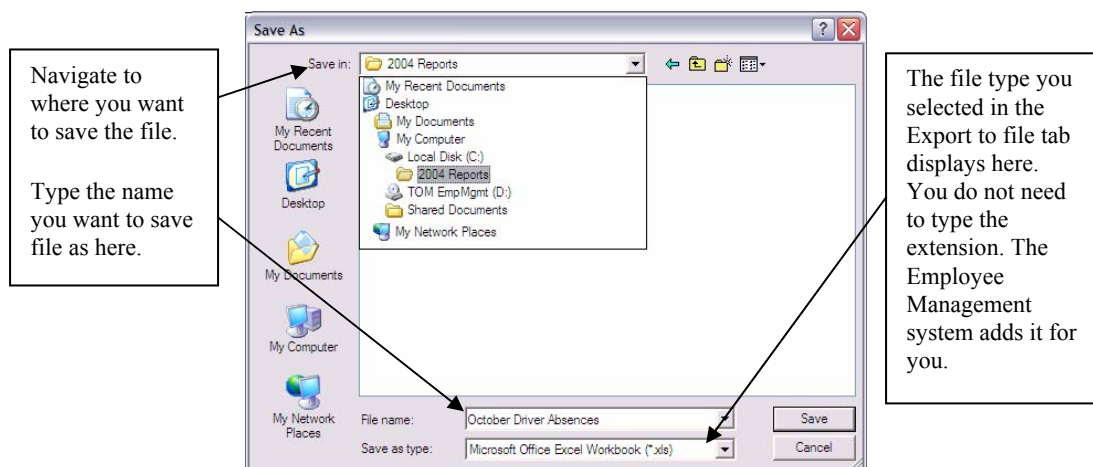


Figure 13-8. Selecting where you want to save the exported file

7. Click the Save button. The Employee Management system closes the screen and returns to the Export to File tab.

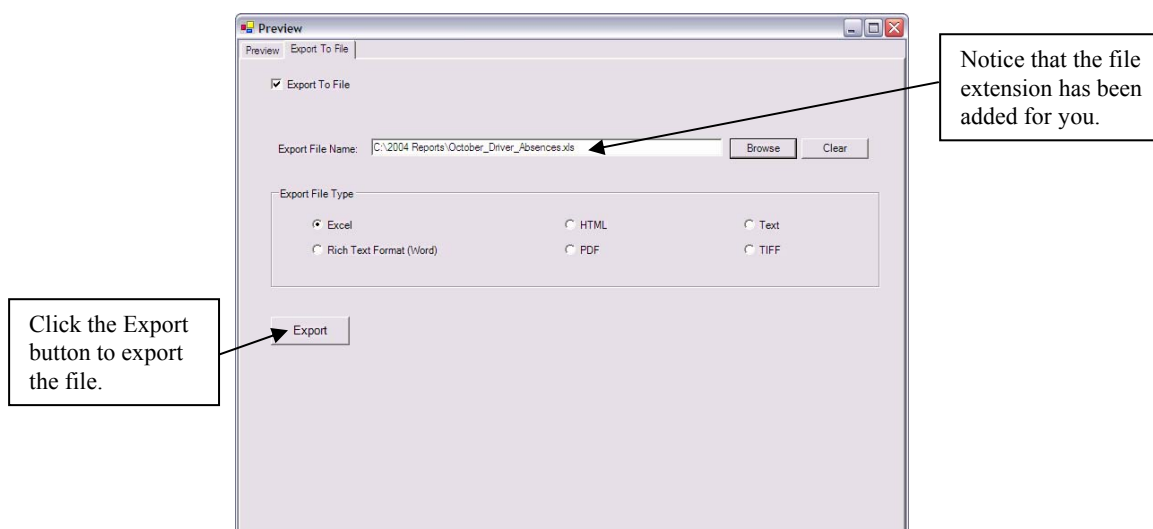


Figure 13-9 Export to File tab after selecting file export and name

8. Click the Export button. The Employee Management system exports the report into the location you selected. You can now open the exported file in the appropriate software; for example, if you selected Excel, you can open that file in Excel.



Employee Reports

Employee reports are available from the Print button in the Employee tab from the Search Employees screen. Some of these reports are also available from the Print button on the Employee Maintenance in the General, Employment & License and User Tabs. The T.O.M. software has a rich selection of reports to print from this screen; to help organize this selection, the reports are organized into four reporting classes. Below is a list of each of these classes and a brief explanation of each class:

1. **BASIC** – These reports are general reports giving a general information about the selected employees.
2. **DETAIL** – These reports list specific information regarding the employee (for example, an employee and the address or an employee and the employees certification information).
3. **PROFILE** – These reports list comprehensive information regarding the employee.
4. **SUMMARY** – These reports give summary counts of employees by a specific category. For example, the Summary Report by Department lists all the departments and the number of employees assigned to each department.

Below is a chart listing all the Employee Reports available, what class of report they are, and whether or the report uses the sort order you specified in the search screen:

Report Name	Report Description	Class	User Change Sort Order?
1 Line Report	A one line report of that lists basic employee information - name, address, phone and status flag	BASIC	Yes
1 Line Report - No Phone	A report that lists basic employee information - name, address and active flag	BASIC	Yes
2 Line - No Phone	A two line report of that lists basic employee information - name, address, status flag, seniority, SSN, birthday, hire date, vehicle, emp. Type, cert. date, and lic. Exp. Date.	BASIC	Yes
2 Line Report	A two line report of that lists basic employee information - name, address, phone, status flag, seniority, SSN, birthday, hire date, vehicle, emp. Type, cert. date, and lic. Exp. Date.	BASIC	Yes
Notes Report	A report that lists all notes for each employee	DETAIL	Yes
Route Report	A report listing employees and their routes. The report is portrait in orientation.	DETAIL	No
With Certification # & Date	A simple report listing the employee's name, certification number and certification date	DETAIL	Yes
With Address & Mailing Address Report	A report listing employees with their residential address and their mailing address	DETAIL	Yes
With Employee Type Report	A report listing employees with their employee types	DETAIL	Yes



Report Name	Report Description	Class	User Change Sort Order?
With License Exp. Date & Vehicle Report	A report listing employees with their license expiration date and vehicle.	DETAIL	Yes
With License, Exp. Date & DOB	A report listing employees with their license #, license expiration date & date of birth	DETAIL	Yes
With Phone, Vehicle # & Emp. Type Report	A report listing employees with their phone #, assigned vehicles and employee type	DETAIL	Yes
With SSN and Employee Type Report	A report listing employees with their SSN and employee types	DETAIL	Yes
With Supervisor Report	A report listing employees with their supervisor	DETAIL	Yes
With Supervisor Report Sorted by Supervisor	A report listing employees with their supervisor sorted by supervisor last name.	DETAIL	No
With Type, Hire Date & Seniority Report	A report listing employees with their employee type, hire date and seniority	DETAIL	Yes
With Vehicle & Signature Report	A report listing employees with their vehicles and a signature line	DETAIL	Yes
With Vehicle Report	A report listing employees with their assigned vehicle	DETAIL	Yes
Comprehensive Profile	A detailed profile sheet listing all the base employee information and all the training, notes, reminder, accidents, absence and training information for each selected employee	PROFILE	Yes
Detail Profile	A detailed profile sheet listing all the base employee information for each selected employee	PROFILE	Yes
Summary Report - By City	A report summarizing the number of employees that are assigned to each city	SUMMARY	No
Summary Report - By Department	A report summarizing the number of employees by their department	SUMMARY	No
Summary Report - By Division	A report summarizing the number of employees by division	SUMMARY	No
Summary Report - By Employee Type	A report summarizing the number of employees that are assigned to each employee type	SUMMARY	No
Summary Report - By Ethnicity	A report summarizing the number of employees by their assigned ethnicity	SUMMARY	No
Summary Report - By Gender	A report summarizing the number of employees by their gender	SUMMARY	No



Report Name	Report Description	Class	User Change Sort Order?
Summary Report - By Mailing City	A report summarizing the number of employees by their mailing city	SUMMARY	No
Summary Report - By Mailing State	A report summarizing the number of employees by their mailing state	SUMMARY	No
Summary Report - By Mailing Zip code	A report summarizing the number of employees by their mailing zip code	SUMMARY	No
Summary Report - By State	A report summarizing the number of employees by their state of residence	SUMMARY	No
Summary Report - By Status	A report summarizing the number of employees by their status	SUMMARY	No
Summary Report - By Supervisor	A report summarizing the number of employees by their supervisor	SUMMARY	No
Summary Report - By User Field #1	A report summarizing the number of employees by the value entered in user defined field #1	SUMMARY	No
Summary Report - By User Field #10	A report summarizing the number of employees by the value entered in user defined field #10	SUMMARY	No
Summary Report - By User Field #2	A report summarizing the number of employees by the value entered in user defined field #2	SUMMARY	No
Summary Report - By User Field #3	A report summarizing the number of employees by the value entered in user defined field #3	SUMMARY	No
Summary Report - By User Field #4	A report summarizing the number of employees by the value entered in user defined field #4	SUMMARY	No
Summary Report - By User Field #5	A report summarizing the number of employees by the value entered in user defined field #5	SUMMARY	No
Summary Report - By User Field #6	A report summarizing the number of employees by the value entered in user defined field #6	SUMMARY	No
Summary Report - By User Field #7	A report summarizing the number of employees by the value entered in user defined field #7	SUMMARY	No
Summary Report - By User Field #8	A report summarizing the number of employees by the value entered in user defined field #8	SUMMARY	No
Summary Report - By User Field #9	A report summarizing the number of employees by the value entered in user defined field #9	SUMMARY	No
Summary Report - By Vehicle Type	A report summarizing the number of employees by the vehicle type of the vehicle they are assigned to	SUMMARY	No



Report Name	Report Description	Class	User Change Sort Order?
Summary Report - By Zip code	A report summarizing the number of employees by their zip code	SUMMARY	No

NOTE: To view printed examples of these reports see Appendix A.1 found later in this book.

Generating an Employee Report from the Search Employees Screen

Example: Creating a report containing basic information for all the bus drivers in your organization

1. Select Bus Driver as the Employee Type.
2. Click the Find Now button. The Employee Management system displays the employee records that have Bus Driver as the Employee Type.

2. Click Find Now to search for all the drivers.

The results display in this window.

1. Select Driver as the Employee Type.

3. Click the Print button.

Figure 13-10. Results of searching for bus drivers

3. Click the Print button. The Employee Management system displays the Employee Search Reports screen (Figure 13-11).
4. Select the report type you want to generate (Figure 13-11).
5. Type a report title (Figure 13-11).
6. Click the Print button (Figure 13-11).

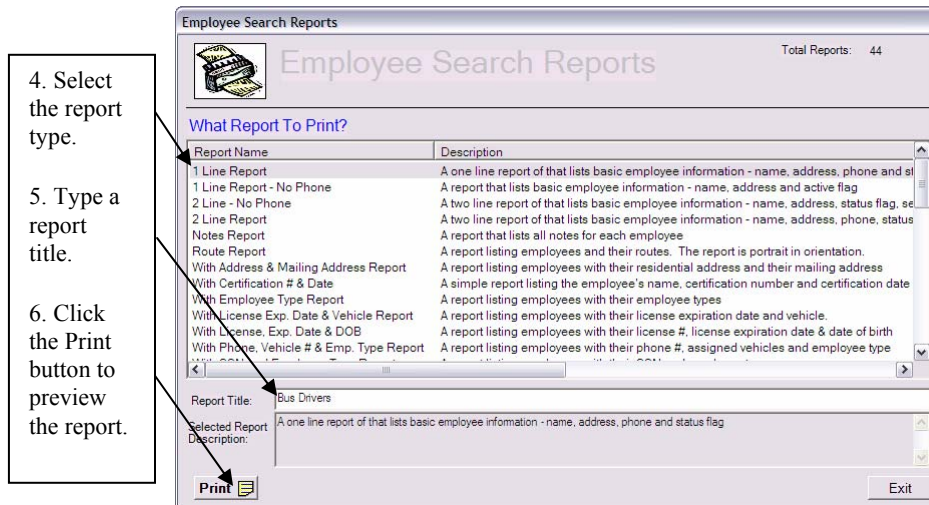


Figure 13-11. Employee Search Reports screen

Figure 13- 12 shows a partial preview of this report:

DEER VALLEY UNIFIED SCHOOL DIST					
Bus Drivers					
Employee Directory					
Emp#	Name	Address	Phone	Active	
497	Paul Bekis	7556 W Via Del Sol Dr. Glendale AZ 85310	(608)699-9657	<input checked="" type="checkbox"/>	
barba202	Laurie Besbe	9799 W. Anderson Dr Phoenix AZ 85023	(608)866-7965	<input checked="" type="checkbox"/>	
bello549	Doreen Bilu	6598 E. Creosote Dr. Cave Creek AZ 85331	(680)699-7886	<input checked="" type="checkbox"/>	
592	Mike Bincun	az	(687)596-7778	<input checked="" type="checkbox"/>	
brun16	Kim Brun	6909 W. Union Hills #8975 Glendale AZ 85308	(608)896-8789	<input checked="" type="checkbox"/>	
bon386	Julene (Julie) Bunney	90807 N 67th Ave Glendale AZ 85302	(687)979-7770	<input checked="" type="checkbox"/>	
bur357	William (Bill) Busghulnis	8598 E. Marco Polo TR # 31 Phoenix AZ 85050	(608)576-8899	<input checked="" type="checkbox"/>	

Figure 13- 12. Sample of partial employee report



T.O.M Tip

Where can I learn more about the report preview?

The report preview is discussed in detail in the Previewing Reports section of this



Generating an Employee Report from the Employee Maintenance Screen

Example: Creating an employee report for an individual employee

1. Search for the employee whose record you want to print (Figure 13-13).
2. Click the Find Now button (Figure 13-13).
3. Select the employee record (Figure 13-13).
4. Click the Edit button (Figure 13-13).

1. Select the criteria you want to use in your search. In this case, the last name is used.

2. Click the Find Now button.

The results of your search display in this window.

3. Select the employee record.

4. Click the Edit button.

Employee #	Last Name	First Name	Employee Type	Phone	Address
9	Bekis	Pamala	BUS AIDE	9979069	8688 W. Wagoner Rd
497	Bekis	Paul	BUS DRIVER	6086999657	7556 W Via Del Sol Dr.

Figure 13-13. Searching for a specific employee's record

NOTE: If you click **Print** on the **Search Employees** screen, you would be creating a report for all the displayed records rather than just a report for the selected employee.

The Employee Management system displays the Employee Maintenance screen (Figure 13-14):



Figure 13-14. Employee Maintenance screen

6. Click the Print button to begin generating the report.

The Employee Management system displays a screen that allows you to select the report type you want to create. The screen displayed when you click the Print button determines which report type screen displays.

7. Select the report type you want to generate. If you are unsure, you can also click on a report type and view its description (Figure 13-15).
8. Type a report title into the box if you want a report title to appear on the report (Figure 13-15).

Report Name	Description
1 Line Report	A one line report of that lists basic employee information - name, address, phone and status flag
1 Line Report - No Phone	A report that lists basic employee information - name, address and active flag
2 Line - No Phone	A two line report of that lists basic employee information - name, address, status flag, seniority, SSN, birthday.
2 Line Report	A two line report of that lists basic employee information - name, address, phone, status flag, seniority, SSN, b
Route Report	A report listing employees and their routes. The report is portrait in orientation.
Comprehensive Profile	A detailed profile sheet listing all the base employee information and all the training, notes, reminder, accident
Detail Profile	A detailed profile sheet listing all the base employee information for each selected employee

Figure 13-15. Selecting the report type, adding the report title, and generating the report preview



- Click the Print button to preview the report (Figure 13-16).

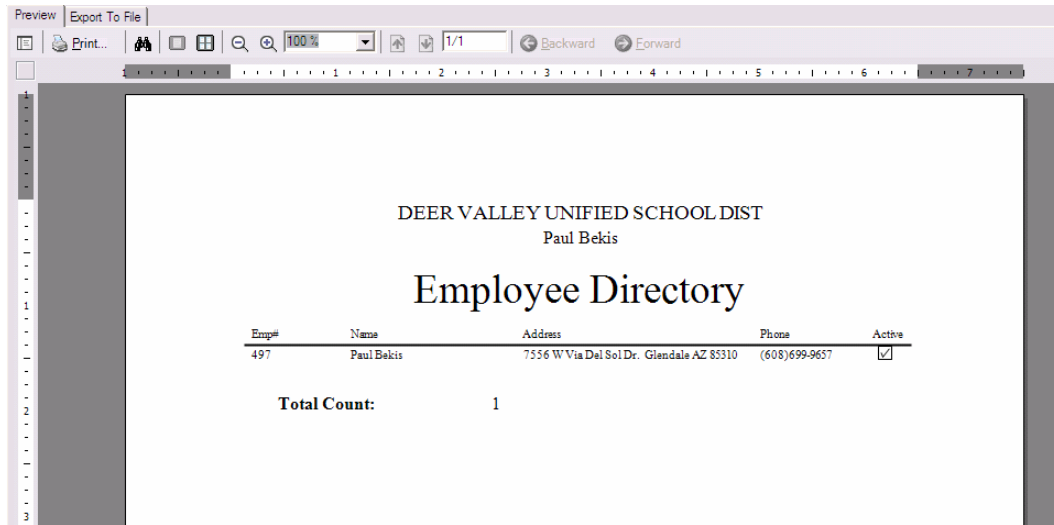


Figure 13-16. Previewing an individual employee's report



T.O.M. Tip

Where can I learn more about the report preview?

The report preview is discussed in detail in the Previewing Reports section of this



Reminder Reports

Reminder reports are available from the Print button in the Reminders tab from the Search Employees screen and also available from the Print button on the Employee Maintenance in Reminders tab. Below is a chart listing all the Reminder reports available, what class of report they are, and whether the report uses the sort order you specified in the search screen:

Report Name	Report Description	Class	User Change Sort Order?
Reminder List 1 Line Report	A report listing reminder information in 1 line per reminder record. The report lists the employee name and reminder information such as type of reminder, due & complete date of reminder and required & achieved hours and comment	BASIC	Yes
Reminders Listed by Employee	Listing Reminders by Employee. The report lists the employee name and reminder information such as type of reminder, due & complete date of reminder and required & achieved hours and comment. The report is in portrait orientation.	BASIC	No

NOTE: To view printed examples of these reports see *Appendix A.2 found later in this book*.

Generating a Reminder Report from the Search Employees Screen

Example: Creating a report containing the employee name and basic reminder information

1. Select Evaluation as the Reminder Category (Figure 13-17).
2. Select All to search for all reminder records (Figure 13-17).
3. Click the Find Now button. The Employee Management system displays the employee records for employees who have an evaluation reminder (Figure 13-17).



2. Select All to search all records.

3. Click Find Now to search for evaluation reminders.

The results display in this window.

1. Select Evaluation as the Reminder Category.

4. Click the Print button.

Search Employees

File Security Maintain Window Help

T.O.M. Employee Management

Tuesday, November 16, 2004

Employees Reminders Training Absences Accidents 2 Record(s) Found

☐ Overdue

☐ All Pending

☒ All

Reminder Category:

☐ Due within

(days)

Reminder Type:

Due Now

Other Options

Sorting

Emp #	Name	Reminder	Category	Due Dt	Rqd Hrs	Achieved	Co
592	Bincun, Mike	ANNUAL	EVALUATION	9/28/2004	10	20	9/2
497	Bekis, Paul	ANNUAL	EVALUATION	10/22/2004			

Find Now

Reset

Group Training

Group Reminder

Print

Exit

Figure 13-17. Results of searching for employees with evaluation reminders

- Click the Print button. The Employee Management system displays the Reminder Search Reports screen (Figure 13-17).
- Select the report type you want to generate (Figure 13-18).
- Type a report title (Figure 13-18).
- Click the Print button (Figure 13-18).

5. Select the report type.

6. Type a report title.

7. Click the Print button to preview the report.

Reminder Search Reports

Total Reports: 2

Reminder Search Reports

What Report To Print?

Report Name	Description
Reminder List 1 Line Report	A report listing reminder information in 1 line per reminder record. The report lists the employee name, Reminders Listed by Employee
Listing Reminders by Employee	Listing Reminders by Employee. The report lists the employee name and reminder information such as

Report Title:

Selected Report Description: A report listing reminder information in 1 line per reminder record. The report lists the employee name and reminder information such as type of reminder, due & complete date of reminder and required & achieved hours and comment

Print

Exit

Figure 13-18. Reminder Search Reports screen



Figure 13-19 shows a partial preview of this report:

DEER VALLEY UNIFIED SCHOOL DIST							
Employee Reminder List							
Evaluation Reminders							
Emp#	Name / Comment	Category	Type	Due	Completed	HOURS	
						Required	Achieved
592	Mike Bincun Test	EVALUATION	ANNUAL	9/28/04	9/28/04	10.00	20.00
497	Paul Bakis	EVALUATION	ANNUAL	10/22/04			
Total Count:		2					

Figure 13-19. Sample of partial reminder report



T.O.M Tip

Where can I learn more about the report preview?

The report preview is discussed in detail in the Previewing Reports section of this

Generating a Reminder Report from the Employee Maintenance Screen

Example: Creating a reminder report for an individual employee

1. Search for the employee whose record you want to print (Figure 13-20).
2. Click the Find Now button (Figure 13-20).
3. Select the employee record (Figure 13-20).
4. Click the Edit button (Figure 13-20).



Search Employees
File Security Maintain Window Help
T.O.M. Employee Management
Thursday, November 11, 2004

Employees Reminders Training Absences Accidents 2 Record(s) Found

Employee ID: SSN: Gender: ☐ Male ☐ Female
Last Name: bekis First:
Address: ☐ Search Entire Ethnicity: Employee Type:

General User Defined Employment Dates Sorting

Employee #	Last Name	First Name	Employee Type	Phone	Address
9	Bekis	Pamala	BUS AIDE	9979069	8688 W. Wagoner Rd
497	Bekis	Paul	BUS DRIVER	608699657	7556 W Via Del Sol Dr.

Show on Map New Edit Delete

Find Now Reset Group Training Group Reminder Print Exit

1. Select the criteria you want to use in your search. In this case, the last name is used.

2. Click the Find Now button.

3. Select the employee record.

4. Click the Edit button.

The results of your search display in this window.

Figure 13-20. Searching for a specific employee's record

NOTE: If you click **Print** on the **Search Employees** screen, you would be creating a report for all the displayed records rather than just a report for the selected employee.

The Employee Management system displays the Employee Maintenance screen (Figure 13-21):

Employee Maintenance -
Employee Bekis, Paul ID#497

General Employment & License Training Absences Reminders Notes Accidents User Defined

Show
☐ Overdue ☐ All Pending
☐ Due within Warning Period ☒ All
☐ Due within 0 (days)

Sort / Order
Sort by #1 Category Ascending
Sort by #2 Type Ascending
Sort by #3 Due Date Descending

Only Type: Category:

Category	Type	Due Date	Rqd Hours	Achieved	Complete Date	Comments
EVALUATION	ANNUAL	10/22/2004				

Add Edit Delete

OK Print Routes Exit

6. Click the Reminders tab.

7. Click the Print button to preview the report.

Figure 13-21. Employee Maintenance screen

6. Click the Reminders tab.



- 7/ Click the Print button to begin generating the report.

The Employee Management system displays a screen that allows you to select the report type you want to create. The screen displayed when you click the Print button determines which report type screen displays.

7. Select the report type you want to generate. If you are unsure, you can also click on a report type and view its description (Figure 13-22).
8. Type a report title into the box if you want a report title to appear on the report (Figure 13-22).

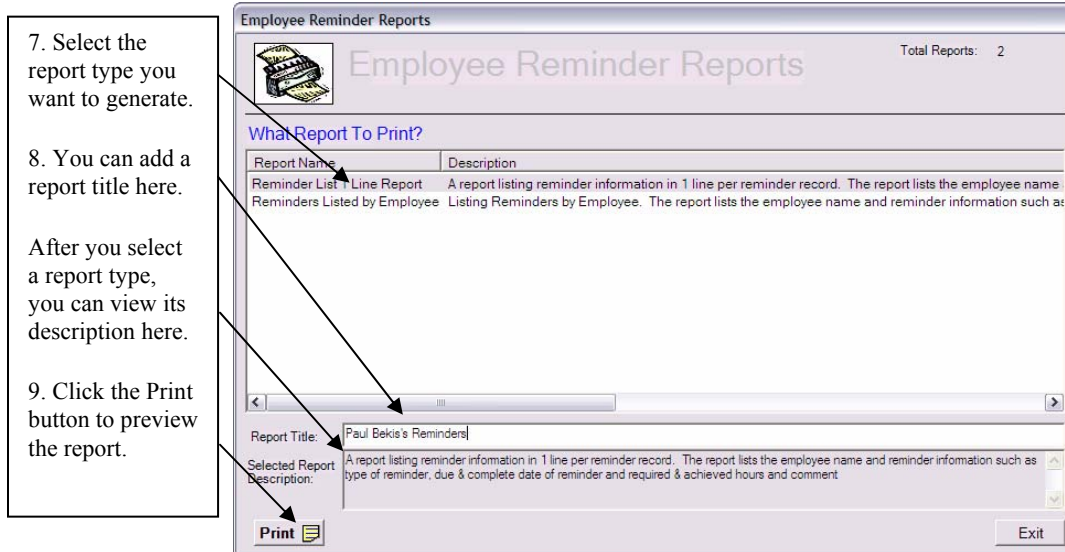


Figure 13-22. Selecting the report type, adding the report title, and generating the report preview

9. Click the Print button to preview the report (Figure 13-23).

DEER VALLEY UNIFIED SCHOOL DIST							
Employee Reminder List							
Paul Bekis's Reminders							
Emp#	Name / Comment	Category	Type	Due	Completed	HOURS	
						Required	Achieved
497	Paul Bekis	EVALUATION	ANNUAL	10/22/04			
Total Count:		1					

Figure 13-23. Previewing an individual employee's reminder report



T.O.M. Tip

Where can I learn more about the report preview?

The report preview is discussed in detail in the Previewing Reports section of this



Training Reports

Training reports are available from the Print button in the Training tab from the Search Employees screen and also available from the Print button on the Employee Maintenance screen in the Training tab. Below is a chart listing all the Training reports available, what class of report they are and whether the report uses the sort order you specified in the search screen:

Report Name	Report Description	Class	User Change Sort Order?
Training List 1 Line Report	A report listing training information in 1 line per training record. The report lists the employee, date, hours, type, instructor and location	BASIC	Yes
Training List 3 Line Report	A report listing training information in 3 line per training record. The report lists the employee, date, hours, type, instructor and location, units, vehicle, in service code, T/C code, proficient, BTW codes, brake code, equip. code	BASIC	Yes
Training Listed by Employee	Training Records by Employee. The report lists the employee, date, hours, type, instructor and location. The report is in portrait orientation.	BASIC	No

NOTE: To view printed examples of these reports see Appendix A.3 found later in this book.

Generating a Training Report from the Search Employees Screen

Example: Creating a training report containing the employee, date, hours, type, instructor and location

1. Select Classroom as the Training Type (Figure 13-24).
2. Select the training instructor from the Instructor pull-down list (Figure 13-24).
3. Click the Find Now button. The Employee Management system displays the employee records for employees who have training matching the selected criteria (Figure 13-24).



1. Select Classroom as the Type.

2. Select the instructor from the pull-down list.

3. Click Find Now to search for all the drivers.

The results display in this window.

Emp #	Name	Date	Instructor	Time(Hrs)	Location
497	Bekis, Paul	10/1/2004	Bekis, Pamala	4	Central Office
barba2...	Besbe, Laurie	10/1/2004	Bekis, Pamala	4	Central Office
243	Biinen, Roy	10/1/2004	Bekis, Pamala	4	Central Office
bello549	Billu, Doreen	10/1/2004	Bekis, Pamala	4	Central Office
592	Bincun, Mike	9/28/2004	Bekis, Pamala	4	Central Office
592	Bincun, Mike	10/1/2004	Bekis, Pamala	4	Central Office
bleifus...	Bliyfuc, Joe	10/1/2004	Bekis, Pamala	4	Central Office
brad477	Bsedfud, Michael	10/1/2004	Bekis, Pamala	4	Central Office
brun16	Bsun, Kim	10/1/2004	Bekis, Pamala	4	Central Office

4. Click the Print button.

Figure 13-24. Results of searching for employees with classroom training

- Click the Print button. The Employee Management system displays the Training Search Reports screen (Figure 13-25).
- Select the report type you want to generate (Figure 13-25).
- Type a report title (Figure 13-25).
- Click the Print button (Figure 13-25).

5. Select the report type.

6. Type a report title.

7. Click the Print button to preview the report.

Figure 13-25. Training Search Reports screen



Figure 13-26 shows a partial preview of this report:

DEER VALLEY UNIFIED SCHOOL DIST						
Employee Training List						
Classroom Training						
Emp#	Name / Comment	Training Date	Hours	Type	Instructor	Location
592	Mike Bincun Test	09/28/2004	4	CLASSROOM	Pamala Bekis	Tempe
lynde285	Linda Lyndi	10/01/2004	4	CLASSROOM	Pamala Bekis	Central Office
8allena334	Robert (Bob) Filline	10/01/2004	4	CLASSROOM	Pamala Bekis	Central Office
320	Jennifer Dyqenyllu	10/01/2004	4	CLASSROOM	Pamala Bekis	Central Office
305	Marie Pisheq	10/01/2004	4	CLASSROOM	Pamala Bekis	Central Office
lykina303	Cindy Lykynic	10/01/2004	4	CLASSROOM	Pamala Bekis	Central Office
thompson300	Connie Thumpcun	10/01/2004	4	CLASSROOM	Pamala Bekis	Central Office
298	Dolores Ryqqyny	10/01/2004	4	CLASSROOM	Pamala Bekis	Central Office

Figure 13-26. Sample of partial reminder report



T.O.M. Tip

Where can I learn more about the report preview?

The report preview is discussed in detail in the Previewing Reports section of this

Generating a Reminder Report from the Employee Maintenance Screen

Example: Creating a training report for an individual employee

1. Search for the employee whose record you want to print (Figure 13-27).
2. Click the Find Now button (Figure 13-27).
3. Select the employee record (Figure 13-27).
4. Click the Edit button (Figure 13-27).

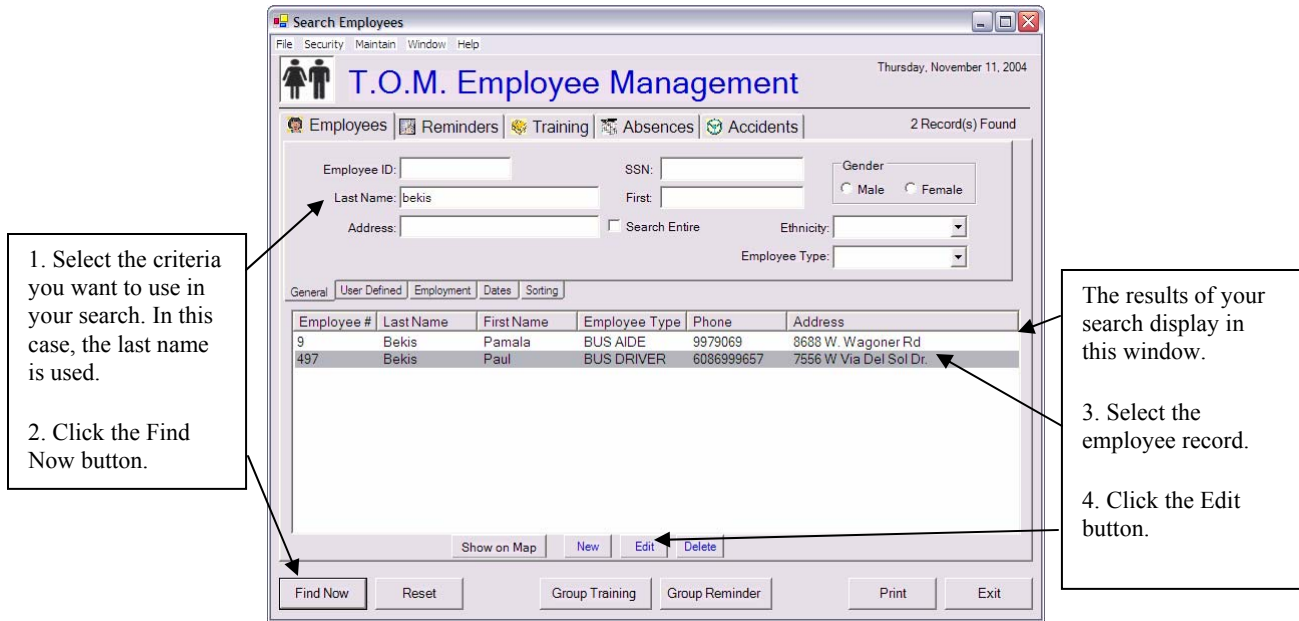


Figure 13-27. Searching for a specific employee's record

NOTE: If you click **Print** on the **Search Employees** screen, you would be creating a report for all the displayed records rather than just a report for the selected employee.

The Employee Management system displays the Employee Maintenance screen (Figure 13-28):

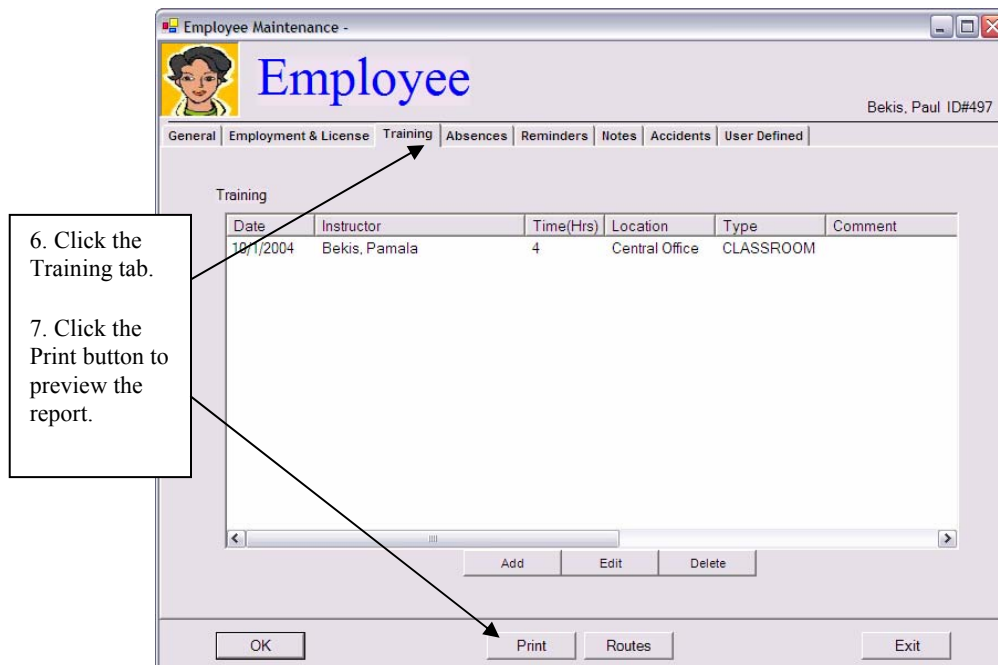


Figure 13-28. Employee Maintenance screen

6. Click the Training tab.



- Click the Print button to begin generating the report.

The Employee Management system displays a screen that allows you to select the report type you want to create. The screen displayed when you click the Print button determines which report type screen displays.

- Select the report type you want to generate. If you are unsure, you can also click on a report type and view its description (Figure 13-29).
- Type a report title into the box if you want a report title to appear on the report (Figure 13-29).

8. Select the report type you want to generate.

9. You can add a report title here.

After you select a report type, you can view its description here.

10. Click the Print button to preview the report.

Report Name	Description
Training List 1 Line Report	A report listing training information in 1 line per training record. The report lists the employee, date, hours, t
Training List 3 Line Report	A report listing training information in 3 line per training record. The report lists the employee, date, hours, t
Training Listed by Employee	Training Records by Employee. The report lists the employee, date, hours, type, instructor and location. Th

Figure 13-29. Selecting the report type, adding the report title, and generating the report preview

- Click the Print button to preview the report (Figure 13-30).

COULDN'T GET IT TO WORK??

Figure 13-30. Previewing an individual employee's training report



T.O.M Tip

Where can I learn more about the report preview?

The report preview is discussed in detail in the Previewing Reports section of this



Absence Reports

Absence reports are available from the Print button in the Absence tab from the Search Employees screen. Some of these reports are also available from the Print button on the Employee Maintenance screen on the Absence tab. The T.O.M. software has several reports to print from this screen; to help organize this selection, the reports are organized into two reporting classes. Below is a list of each of these classes and a brief explanation of each class:

1. **BASIC** – These reports are general reports giving a general information about the selected absences.
2. **SUMMARY** – These reports give summary counts of absences by a specific category.

Below is a chart listing all the Absence reports available, what class of report they are, and whether the report uses the sort order you specified in the search screen:

Report Name	Report Description	Class	User Change Sort Order?
Absence 1 Line Report - By Code, Employee and Date	A one line report listing employee absence information. The report contains the employee, the date and type of absence, hours of absence and a comment. The report is sorted by code, employee name, and date.	BASIC	No
Absence 1 Line Report - By Date, Code and Employee	A one line report listing employee absence information. The report contains the employee, the date and type of absence, hours of absence and a comment. The report is sorted by date, code, and employee name.	BASIC	No
Absence 1 Line Report - By Employee, Date and Code	A one line report listing employee absence information. The report contains the employee, the date and type of absence, hours of absence and a comment. The report is sorted by employee name, date and code.	BASIC	No
Absences Listed By Employee	Listing absences by employee. The report contains the employee name and then all of his / her absences listing the date and type of absence, hours of absence and a comment. The report is sorted by employee name and is in portrait orientation.	BASIC	No
Absence Summary Report - By Absence Code	A report summarizing absences by Absence Code	SUMMARY	No

NOTE: To view printed examples of these reports see Appendix A.4 found later in this book.



Generating an Absence Report from the Search Employees Screen

Example: Creating a Report Showing All Drivers with Absences In October 2004

1. Select the search criteria on the Employee search screen. Figure 13-31 shows selecting Driver as the search criteria, and Figure 13-32 shows selecting a date range on the Absences tab.

Select your search criteria from these tabs.

Search Employees
File Security Maintain Window Help
T.O.M. Employee Management
Thursday, November 11, 2004

Employees Reminders Training Absences Accidents

Employee ID: SSN: Gender: Male Female
Last Name: First: Ethnicity: Employee Type: D
Address: Search Entire

General User Defined Employment Dates Sorting

Employee #	Last Name	First Name	Employee Type	Phone	Address
------------	-----------	------------	---------------	-------	---------

Show on Map New Edit Delete

Find Now Reset Group Training Group Reminder Print Exit

Figure 13-31. Selecting Driver as the search criteria

2. Click the Find Now button to search the database.

Search Employees
File Security Maintain Window Help
T.O.M. Employee Management
Thursday, November 11, 2004

Employees Reminders Training Absences Accidents 6 Record(s) Found

(Nothing Selected Will Show All Days)

Absence Code: Show Absence On: Monday Tuesday Wednesday Thursday Friday
Absences between: 10/1/2004 and 10/31/2004
Hours Used is > Maximum Hours

Emp #	Name	Code	Date	Day of Week	Hrs	Hrs Used	Max Hrs	Pa
497	Bekis, Paul	PERSONAL	10/15/2004	Friday	4	4	0	
202	Besbe, Laurie	SICK	10/5/2004	Tuesday	8	16	0	
202	Besbe, Laurie	SICK	10/6/2004	Wednesday	8	16	0	
236	Buuth, Joan	SICK	10/20/2004	Wednesday	4	4	0	
155	Bux, Michael (Mike)	UNEXCUSED	10/29/2004	Friday	8	8	0	
574	Clinintc, Jerome	SICK	10/21/2004	Thursday	8	8	0	

Find Now Reset Group Training Group Reminder Print Exit

4. Click the Print button to start generating the report.

The results of your search display in this window.

Figure 13-32. Viewing the search results for drivers who were absent in October 2004



2. Click the Find Now button to search the database for employee records matching your search criteria.
3. Sort the records, if applicable. Most reports obey the sort order displayed on the screen. In this example, Figure 13-32 shows that the results are already sorted by the employee's last name. Sorting absences by the employee's last name is the default behavior, so you do not need to sort the records.
4. Click the Print button to start generating the report.

The Employee Management system displays a screen that allows you to select the report type you want to create. The screen displayed when you click the Print button determines which report type screen displays. In this example, the Print button was clicked on the Absences screen, so you would be able to select a report type in the Absence report category.

5. Select the report type you want to generate. If you are unsure, you can also click on a report type and view its description (Figure 13-33).
6. Type a report title into the box if you want a report title to appear on the report (Figure 13-33).

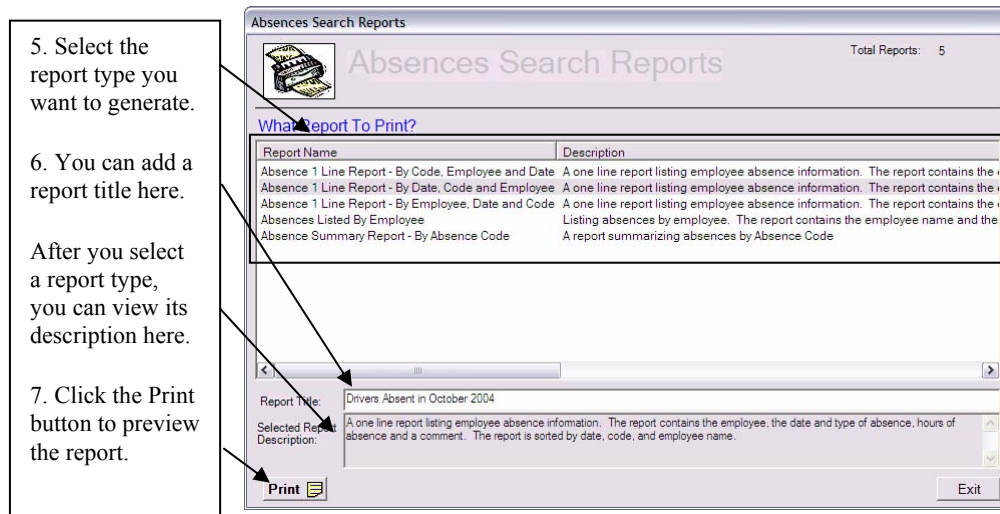


Figure 13-33. Selecting the report type, adding the report title, and generating the report preview

7. Click the Print button to generate and preview the report (Figure 13-33).



Preview

Preview Export To File

Print... 100% 1/1 Backward Forward

DEER VALLEY UNIFIED SCHOOL DIST

Employee Absences

Drivers Absent in October 2004

Emp#	Name / Comment	Code	Date	Absence Hours	Emp. Total Hours Used
barba202	Laurie Besbe	SICK	10/5/04	8.00	16.00
barba202	Laurie Besbe	SICK	10/6/04	8.00	16.00
497	Paul Bekis	PERSONAL	10/15/04	4.00	4.00
	Attended family member's funeral.				
boo236	Joan Buntz	SICK	10/20/04	4.00	4.00
clern574	Jerome Clinintc	SICK	10/21/04	8.00	8.00
box155	Michael (Mike) Bux	UNEXCUSED	10/29/04	8.00	8.00
Total Count:		6			

Figure 13-34. Report preview

**T.O.M. Tip****Where can I learn more about the report preview?**

The report preview is discussed in detail in the Previewing Reports section of this

Generating an Absence Report from the Employee Maintenance Screen

Example: Creating an Absence Report for an Individual Employee

1. Search for the employee whose record you want to print (Figure 13-35).
2. Click the Find Now button (Figure 13-35).
3. Select the employee record (Figure 13-35).
4. Click the Edit button (Figure 13-35).



Search Employees
File Security Maintain Window Help
T.O.M. Employee Management
Thursday, November 11, 2004

Employees Reminders Training Absences Accidents 2 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
9	Bekis	Pamala	BUS AIDE	9979069	8688 W. Wagoner Rd
497	Bekis	Paul	BUS DRIVER	6086999657	7556 W Via Del Sol Dr.

Show on Map New Edit Delete

Find Now Reset Group Training Group Reminder Print Exit

1. Select the criteria you want to use in your search. In this case, the last name is used.

2. Click the Find Now button.

The results of your search display in this window.

3. Select the employee record.

4. Click the Edit button.

Figure 13-35. Searching for a specific employee's record

NOTE: If you click **Print** on the **Search Employees** screen, you would be creating a report for all the displayed records rather than just a report for the selected employee.

The Employee Management system displays the Employee Maintenance screen (Figure 13-36):

Employee Maintenance -
Employee
Bekis, Paul ID#497

General Employment & License Training Absences Reminders Notes Accidents User Defined

Employee ID: 497 SSN: 666-66-6666 Gender: ☐ Male ☐ Female
 Name: Paul Bekis Ethnicity:
 DOB: 6/30/1971 Birth Place: Email:
 Phone: 6086999657 Addit Phone: Desc:

Address
 Residence: 7556 W Via Del Sol Dr.
 Glendale AZ 85310 Show on Map
 Mailing: 7556 W Via Del Sol Dr.
 Glendale AZ 85310 Copy Residence
 Paste Photo

OK Print Routes Exit

Figure 13-36. Employee Maintenance screen

5. Select the tab containing the employee information you want to print. For example, if you want to print that employee's absences, click the Absences tab.



Figure 13-37 shows Paul Bekis's absences.

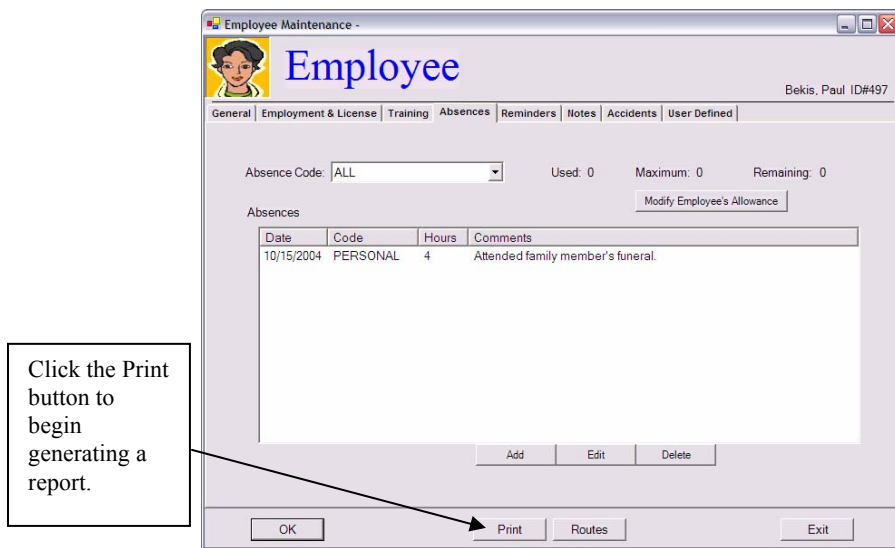


Figure 13-37. Viewing an individual employee's absences

6. Click the Print button to begin generating the report.

The Employee Management system displays a screen that allows you to select the report type you want to create. The screen displayed when you click the Print button determines which report type screen displays. In this example, the Print button was clicked on the Absences screen, so you would be able to select a report type in the Absence report category.

7. Select the report type you want to generate. If you are unsure, you can also click on a report type and view its description (Figure 13-38).
8. Type a report title into the box if you want a report title to appear on the report (Figure 13-38).

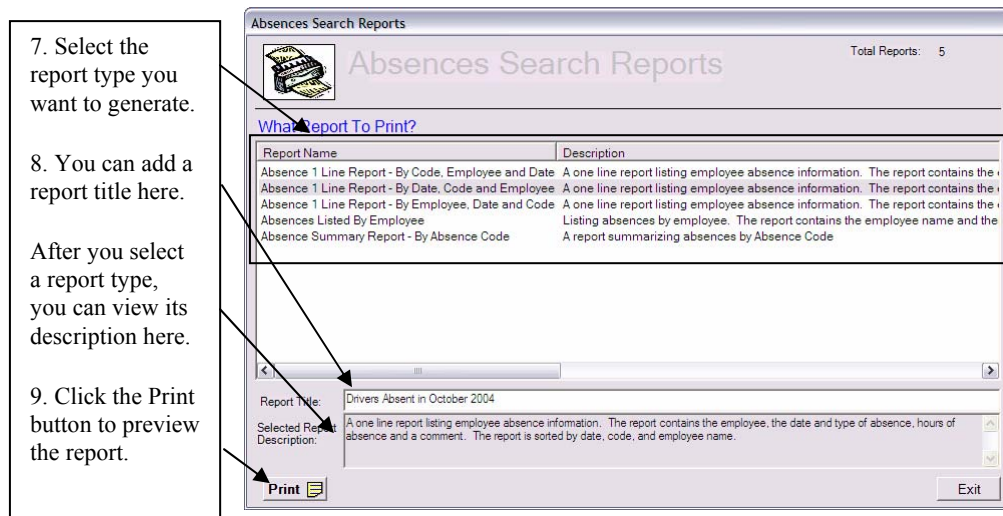


Figure 13-38. Selecting the report type, adding the report title, and generating the report preview



9. Click the Print button to preview the report (Figure 13-39).

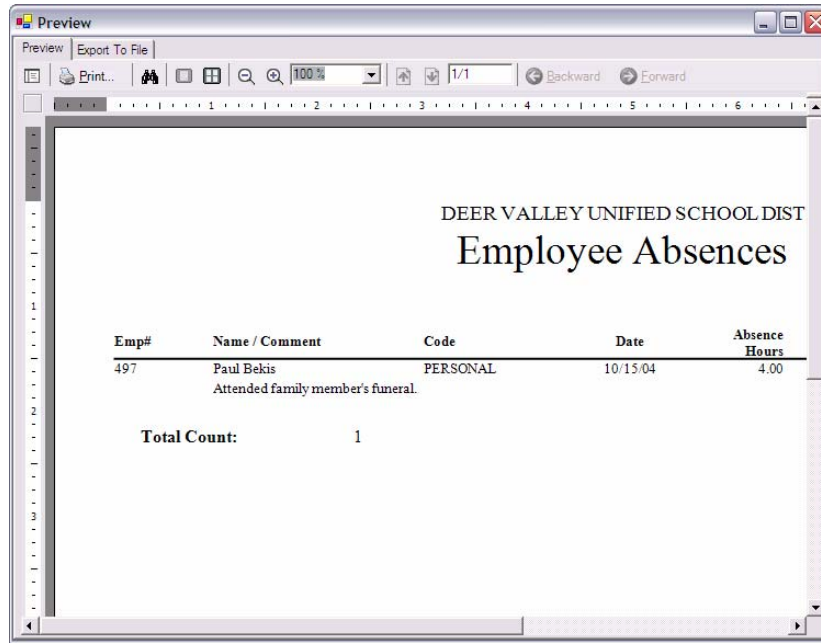


Figure 13-39. Previewing an individual employee's absence report

NOTE: Continue to the next section for more information about the report preview.



Accident Reports

Accident reports are available from the Print button in the Absence tab from the Search Employees screen. Some of these reports are also available from the Print button on the Employee Maintenance screen in the Accidents Tab. The T.O.M. software has several reports to print from this screen; to help organize this selection the reports are organized into three reporting classes. Below is a list of each of these classes and a brief explanation of each class:

1. **BASIC** – These reports are general reports giving a general information about the selected accidents.
2. **PROFILE** – These reports list comprehensive information regarding the accident.
3. **SUMMARY** – These reports give summary counts of accidents by a specific category.

Below is a chart listing all the Accident Reports available, what class of report they are and whether or the report uses the sort order you specified in the search screen:

Report Name	Report Description	Class	User Change Sort Order?
Accident 1 Line Report by Employee	A report listing accident reports in 1 line. The report lists information like the employee, the vehicle and date, time type and location of the accident. The report is sorted by Employee Name	BASIC	No
Accident 1 Line Rpt With Contrib. Factors by Emp	A report listing accident reports in 1 line with contributing factors. The report lists information like the employee, the vehicle and date, time type and location of the accident. The report is sorted by Employee Name with all contributing factors of the accident.	BASIC	No
Accident 3 Line Rpt With Contrib. Factors by Emp	A report listing accident reports in 3 line with contributing factors. The report lists the employee, the vehicle and date, time, type, location of the accident, Run, InUse For, # of Passengers, Injury type, Comment & recommendations. The report is sorted by Employee Name and also contains all contributing factors of the accident.	BASIC	No
Accident 3 Line Accident Report By Employee	A report listing accident reports in 3 lines. The report lists the employee, the vehicle and date, time, type, location of the accident, Run, InUse For, # of Passengers, Injury type, Comment & recommendations. The report is sorted by Employee Name	BASIC	No
Accidents by Employee	Accidents by Employee. The report lists information like the employee, the vehicle and date, time type and location of the accident. The report is sorted by Employee Name. The report is in portrait orientation.	BASIC	No
Accident Report	A detailed document concerning an accident / incident report.	PROFILE	No



Accident Summary Report - By Accident Type	A report summarizing the number of accidents by accident type	SUMMARY	No
Accident Summary Report - By Damage Type	A report summarizing accidents by Damage Type	SUMMARY	No
Accident Summary Report by Injury Type	A report summarizing accidents by Injury Type Code	SUMMARY	No

NOTE: To view printed examples of these reports see Appendix A.5 found later in this book.

Generating an Accident Report from the Search Employees Screen

Example: Creating a report listing all the accidents that occurred in one month

1. Select the dates you want to include in the search. In this case, the selected dates are 10/1/2004 and 10/31/2004.
2. Click the Find Now button (Figure 13-40).

2. Click Find Now to search for accidents within the time period.

The results display in this window.

Search Employees

T.O.M. Employee Management

Tuesday, November 16, 2004

Employees Reminders Training Absences Accidents 3 Record(s) Found

Accident #: Vehicle #:

Addr/Location: ☐ Search Entire Accident Type:

Accident Dt between: 10/1/2004 and 10/31/2004 Time between: and

General Details & Contributing Factors User/Custom

Date	Time	Type	Location	Vehicle	Emp #	Na
10/8/2004	2:00 PM	NC_OTHER	1231 Main Street, Phoenix AZ	28	497	Be
10/12/2004	11:00 AM			119	531	Bli
10/26/2004	12:00 AM	VEHICLE_ONE	1225 W. Anthony Street, Phoenix AZ	103	592	Bin

Show on Map

Find Now Reset Group Training Group Reminder Print Exit

1. Select the dates you want to include in the report.

3. Click the Print button.

Figure 13-40. Results of searching for accidents that occurred in October

3. Click the Print button. The Employee Management system displays the Accident Search Reports screen (Figure 13-40).
4. Select the report type you want to generate (Figure 13-40).
5. Type a report title (Figure 13-40).



6. Click the Print button (Figure 13-40).

4. Select the report type.

5. Type a report title.

6. Click the Print button to preview the report.

Figure 13-41. Employee Search Reports screen

Figure 13-42 shows a partial preview of this report:

DEER VALLEY UNIFIED SCHOOL DIST						
Employee Accidents						
Accidents in October 2004						
Emp#	Name	Vehicle	Date	Time	Type	Location
497	Paul Bekis	28	10/8/04	2:00 PM	NC_OTHER	1231 Main Street
592	Mike Bincun	103	10/26/04		VEHICLE_ONE	1225 W. Anthony Street
bleifus531	Joe Blyfuc	119	10/12/04	11:00 AM		
Total Count:		3				

Figure 13-42. Sample of partial accident report



① **T.O.M Tip**

Where can I learn more about the report preview?

The report preview is discussed in detail in the Previewing Reports section of this



Generating an Employee Report from the Employee Maintenance Screen

Example: Creating an accident report for an individual employee

1. Search for the employee whose record you want to print (Figure 13-43).
2. Click the Find Now button (Figure 13-43).
3. Select the employee record (Figure 13-43).
4. Click the Edit button (Figure 13-43).

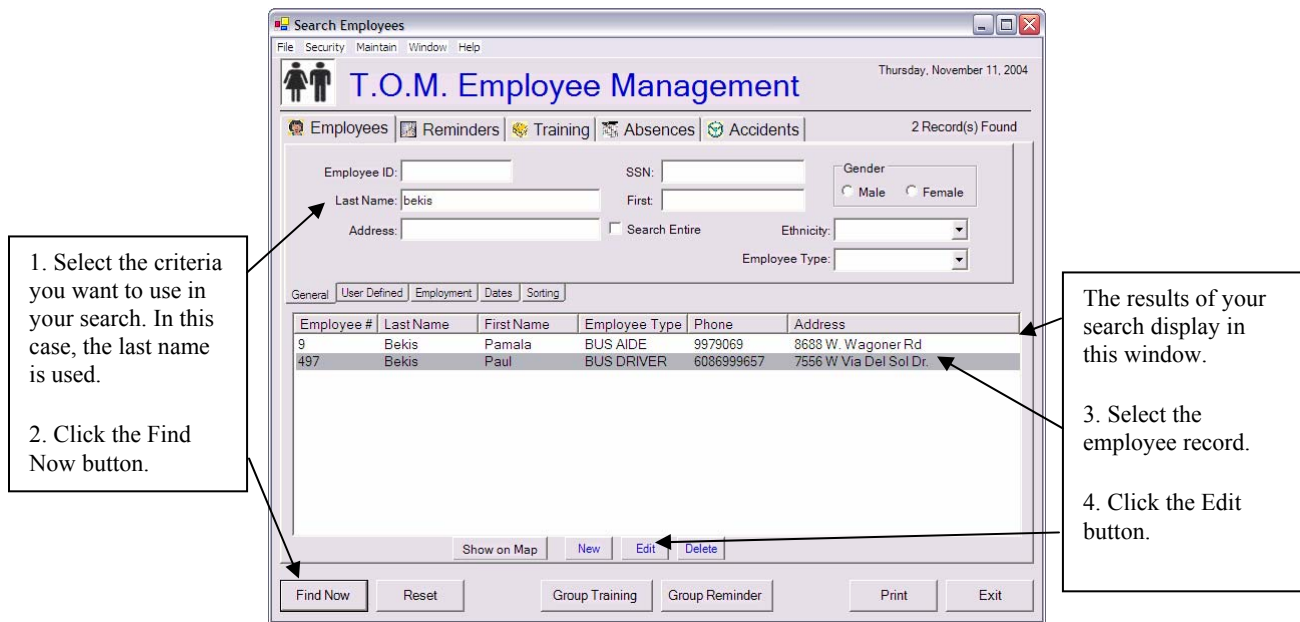


Figure 13-43. Searching for a specific employee's record

NOTE: If you click **Print** on the **Search Employees** screen, you would be creating a report for all the displayed records rather than just a report for the selected employee.

The Employee Management system displays the Employee Maintenance screen (Figure 13-44).

5. Click the Accidents tab.

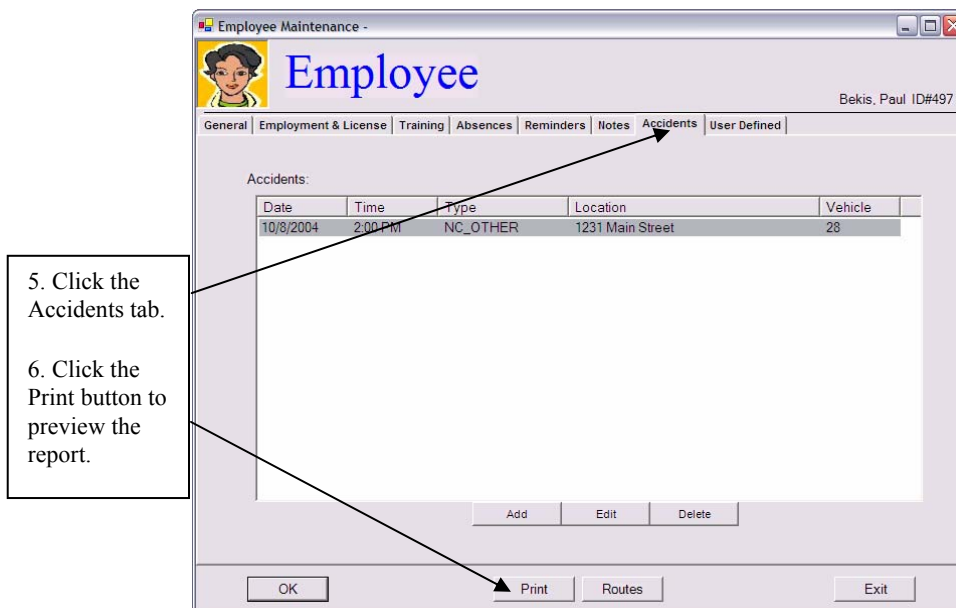


Figure 13-44. Employee Maintenance screen

- Click the Print button to begin generating the report.

The Employee Management system displays a screen that allows you to select the report type you want to create. The screen displayed when you click the Print button determines which report type screen displays.

- Select the report type you want to generate. If you are unsure, you can also click on a report type and view its description (Figure 13-45).
- Type a report title into the box if you want a report title to appear on the report (Figure 13-45).

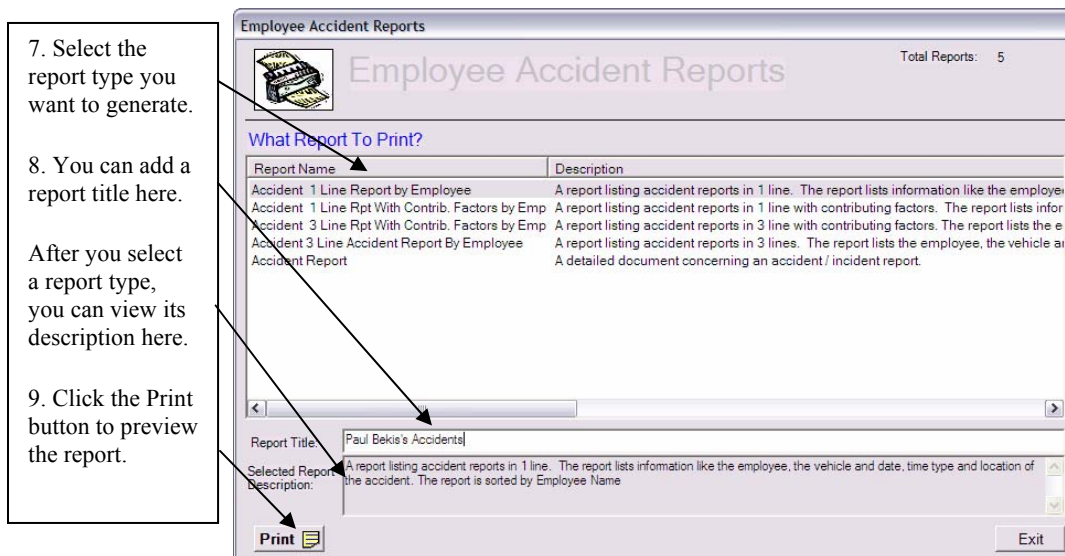


Figure 13-45. Selecting the report type, adding the report title, and generating the report preview



9. Click the Print button to preview the report (Figure 13-46).

DEER VALLEY UNIFIED SCHOOL DIST						
Employee Accidents						
Paul Bekis's Accidents						
Emp#	Name	Vehicle	Date	Time	Type	Location
497	Paul Bekis	28	10/8/04	2:00 PM	NC_OTHER	1231 Main Street
Total Count:		1				

Figure 13-46. Previewing an individual employee's accident report



T.O.M Tip

Where can I learn more about the report preview?

The report preview is discussed in detail in the Previewing Reports section of this



Notes Reports

Notes reports are available from both the Print button in the Employees Tab from the Main Search Screen and also available from the Print button on the Detailed Employee Screen in Notes Tab. Below is a chart listing all the Notes Reports available, what class of report they are and whether or the report uses the sort order you specified in the search screen:

Report Name	Report Description	Class	User Change Sort Order?
Notes Report	A report that lists all notes for each employee	BASIC	Yes

NOTE: To view printed examples of these reports see Appendix A.6 found later in this book.

Example: Creating a notes report for an individual employee

1. Search for the employee whose record you want to print (Figure 13-47).
2. Click the Find Now button (Figure 13-47).
3. Select the employee record (Figure 13-47).
4. Click the Edit button (Figure 13-47).

1. Select the criteria you want to use in your search. In this case, the last name is used.

2. Click the Find Now button.

3. Select the employee record.

4. Click the Edit button.

The results of your search display in this window.

Employee #	Last Name	First Name	Employee Type	Phone	Address
9	Bekis	Pamala	BUS AIDE	9979069	8688 W. Wagoner Rd
497	Bekis	Paul	BUS DRIVER	6086999657	7556 W Via Del Sol Dr.

Figure 13-47. Searching for a specific employee's record



NOTE: If you click *Print* on the *Search Employees* screen, you would be creating a report for all the displayed records rather than just a report for the selected employee.

The Employee Management system displays the Employee Maintenance screen (Figure 13-48).

5. Click the Notes tab.

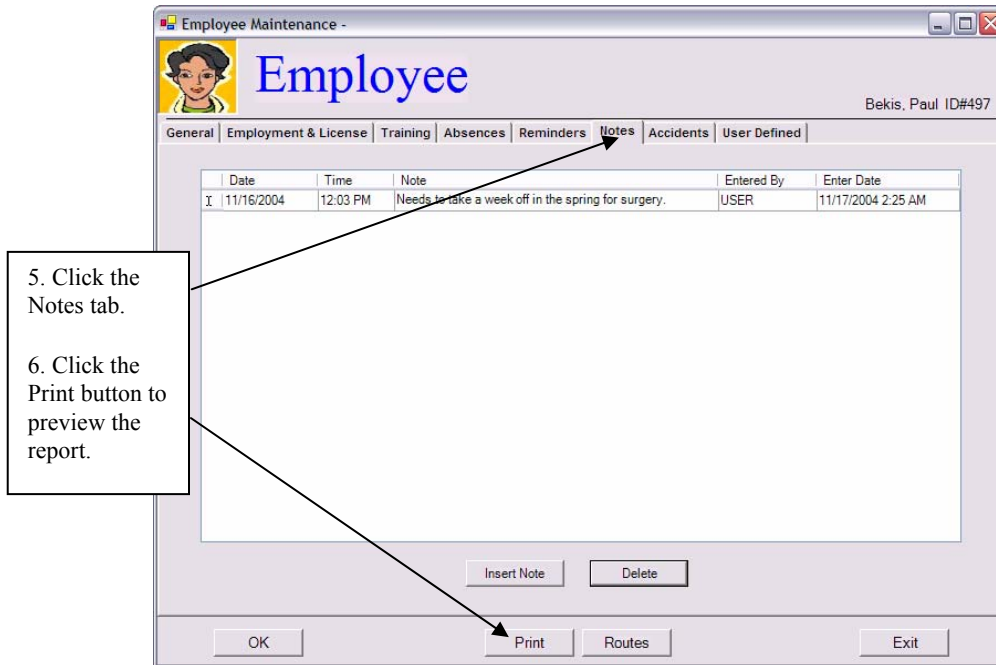


Figure 13-48. Employee Maintenance screen

6. Click the Print button to begin generating the report.

The Employee Management system displays a screen that allows you to select the report type you want to create. The screen displayed when you click the Print button determines which report type screen displays.

7. Select the report type you want to generate. If you are unsure, you can also click on a report type and view its description (Figure 13-49).
8. Type a report title into the box if you want a report title to appear on the report (Figure 13-49).



7. Select the report type you want to generate.

8. You can add a report title here.

After you select a report type, you can view its description here.

9. Click the Print button to preview the report.

Report Name	Description	Class	Custom
Notes Report	A report that lists all notes for each employee	DETAIL	False

Report Title: Paul Bekis's Notes

Selected Report Description: A report that lists all notes for each employee

Print Exit

Figure 13-49. Selecting the report type, adding the report title, and generating the report preview

9. Click the Print button to preview the report (Figure 13-50).

COULDN'T GET THIS TO WORK.

Figure 13-50. Previewing an individual employee's notes report



① **T.O.M Tip**

Where can I learn more about the report preview?

The report preview is discussed in detail in the Previewing Reports section of this



Check-In History Reports

Check-In History Reports are available in the Print button in the Check-In History Screen. Below is a chart listing all the Check-In Reports available, what class of report they are and whether or the report uses the sort order you specified in the search screen:

Report Name	Report Description	Class	User Change Sort Order?
1 Line Report	A report listing check-in history information in 1 line per check-in record. The report lists the employee name, check-in record date, shift, time scheduled to check-in, actual time of check-in, confirmation of reading note(s), and administrative notes. The report is in landscape orientation.	BASIC	Yes
2 Line Report	A report listing check-in history information in 2 lines per check-in record. The report lists the employee name, check-in record date, shift, time scheduled to check-in, actual time of check-in, confirmation of reading note(s), and administrative notes, employee message, check-in source and district message. The report is in landscape orientation.	BASIC	No

NOTE: To view printed examples of these reports see *Appendix A.7* found later in this book.

Example: Creating a check-in history report for the month of October

1. Select File>Report in the Check-In screen (Figure 13-51).

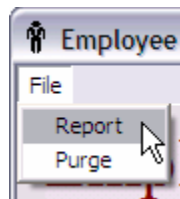


Figure 13-51. Selecting File>Report

The Check-In History Report screen displays.

2. Select the date range by clicking the pull-down arrow and using the arrows on the top of the calendar to scroll through the months and years.
3. Click the Find Now button to search check-in records (Figure 13-52).



2. Select the date range you want to include in the report.

3. Click the Find Now button to search for records matching the selected criteria.

Check-in records display in this window.

4. Click the Print button to preview the report.

#	Last Name	First Name	Trans. Date / Time	Time Scheduled	Time In	Minutes Late	Ver
519	Thuncun	Barbara	10/27/2004 3:48:12...	7:00 AM		0	124
526	Fuulkc	Wanda	10/27/2004 3:48:12...	7:00 AM		0	120
276	Dsiw	Jean	10/27/2004 3:48:12...	7:35 AM		0	138
541	Lundey	Patricia	10/27/2004 3:48:12...	7:00 AM		0	19
551	Csewfusd	Lisa	10/27/2004 3:48:12...	7:00 AM		0	152
393	Fesncwusth	Charlene	10/27/2004 3:48:12...	7:00 AM		0	99
538	Tuingil	Connie	10/27/2004 3:48:12...	7:00 AM		0	102
514	Wytisc	Joanne	10/27/2004 3:48:12...	7:00 AM		0	137

Figure 13-52. Searching for check-in records for October

4. Click the Print button to begin generating the report (Figure 13-52).

The Employee Management system displays a screen that allows you to select the report type you want to create. The screen displayed when you click the Print button determines which report type screen displays.

5. Select the report type you want to generate. If you are unsure, you can also click on a report type and view its description (Figure 13-53).
6. Type a report title into the box if you want a report title to appear on the report (Figure 13-53).

5. Select the report type you want to generate.

6. You can add a report title here.

After you select a report type, you can view its description here.

7. Click the Print button to preview the report.

What Report To Print?

Report No.	Description
1 Line Report	A report listing check-in history information in 1 line per check-in record. The report lists the employee name, check-in record date, shift, time scheduled to check-in, actual time of check-in, confirmation of reading note(s), and administrative notes. The report is in landscape orientation.
2 Line Report	A report listing check-in history information in 2 lines per check-in record. The report lists the employee name, check-in record date, shift, time scheduled to check-in, actual time of check-in, confirmation of reading note(s), and administrative notes. The report is in portrait orientation.

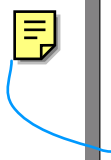
Report Title: October 2004

Selected Report Description: A report listing check-in history information in 1 line per check-in record. The report lists the employee name, check-in record date, shift, time scheduled to check-in, actual time of check-in, confirmation of reading note(s), and administrative notes. The report is in landscape orientation.

Figure 13-53. Selecting the check-in history report you want to create



7. Click the Print button to preview the report.



DEER VALLEY UNIFIED SCHOOL DIST				
October 2004				
Employee Directory				
Emp#	Name	Address	Phone	Active
70	Linda Kwystowicz	7095 W. Marial Dr. Phoenix AZ 85053	(608)789-9957	<input type="checkbox"/>
71	JOSEPH (JOE) LeDiye	7778 W. MARCOPOLO RD. PHOENIX AZ 85027	(608)589-0089	<input type="checkbox"/>
72	DAISY LeMBERT	6796 W. CAROL AVE. GLENDALE AZ 85302	(608)979-0866	<input type="checkbox"/>
73	Elmer (Al) Leuvic	99807 N 89th Ave # 301 Phoenix AZ 85027	(687)780-6596	<input type="checkbox"/>
marlene675	Marlene Lewinski	5868 W. Wescott Dr. Glendale AZ 85308	(608)588-8807	<input checked="" type="checkbox"/>
77	Gerald (Jerry) Lyninficis	88709 N. Blk. Hwy. Lot G4 Phoenix AZ 85027	(608)596-8887	<input type="checkbox"/>

Figure 13-54. Previewing a check-in history report



T.O.M Tip

Where can I learn more about the report preview?

The report preview is discussed in detail in the Previewing Reports section of this

Lookup List Reports

The T.O.M. Employee Management Software has many user defined lookup lists. Each of these lists can be printed out by clicking the Print button on the lists maintenance screen. Below are all of the lookup lists that you can get a printed report of:

- Absence Codes
- Accidents – Accident Types
- Accidents – Contributing Factors
- Accidents – Reasons In-Use Codes
- Accidents – Injury Codes
- Accidents – Damage Codes
- Reminders Categories
- Reminder Types
- Training Codes
- Vehicles
- Employee Types
- Employee Statuses
- Ethnicity Codes
- Vehicle Types
- Divisions
- Departments
- Shifts

NOTE: To view printed examples of these reports see Appendix A.8 found later in this book.



Absence Codes

1. Select File>Absence Codes (Figure 13-55).

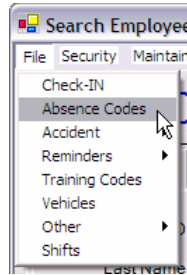


Figure 13-55. Selecting File>Absence Codes

The Absence Codes screen appears.

2. Click the Print button (Figure 13-56).

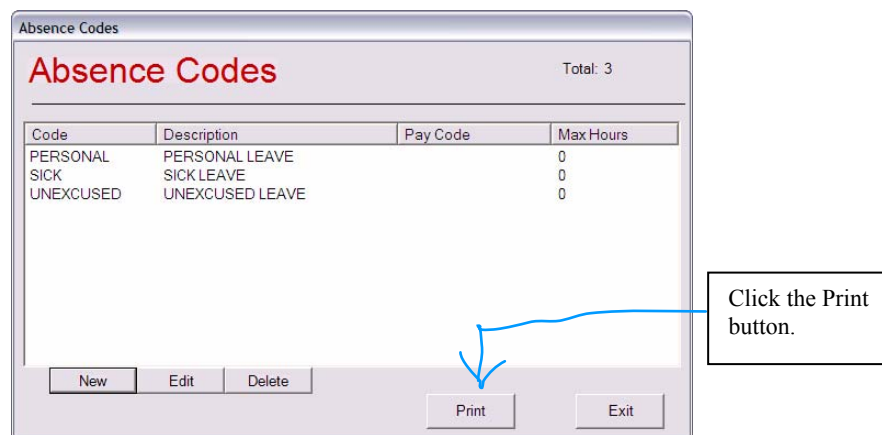


Figure 13-56. Selecting the Print button on the Absence Codes screen

The Absence Codes Reports screen appears (Figure 13-57).

3. Select the report type you want to generate. If you are unsure, you can also click on a report type and view its description (Figure 13-57).
4. Type a report title into the box if you want a report title to appear on the report (Figure 13-57).



3. Select the report type you want to generate.

4. You can add a report title here.

After you select a report type, you can view its description here.

5. Click the Print button to preview the report.

Absence Code Reports

Total Reports: 1

What Report To Print?

Report Name	Description	Class	Custom
Absence Code List	A list of Absence Codes	BASIC	False

Report Title: Absence Codes

Selected Report Description:

Print Exit

Figure 13-57. Generating an absence code report

5. Click the Print button to preview the report.

Figure 13-58 shows what the report looks like:

DEER VALLEY UNIFIED SCHOOL DIST			
Absence Code List			
Absence Codes			
Absence Code	Description	Max Hours	Active
PERSONAL	PERSONAL LEAVE	0.00	<input checked="" type="checkbox"/>
SICK	SICK LEAVE	0.00	<input checked="" type="checkbox"/>
UNEXCUSED	UNEXCUSED LEAVE	0.00	<input checked="" type="checkbox"/>
Total Count:		3	

Figure 13-58. Absence Codes report



Training Codes

1. Select File>Training Codes (Figure 13-59).

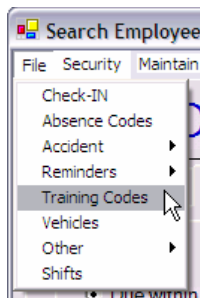
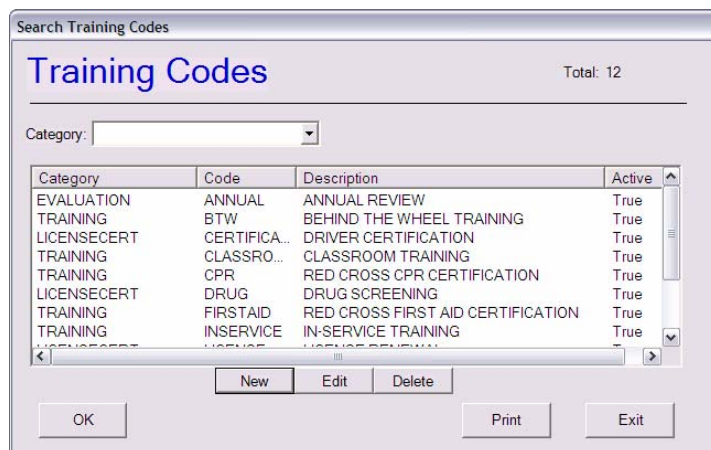


Figure 13-59. Selecting File>Accident>Accident Types

The Search Training Codes screen appears.

2. Click the Print button (Figure 13-60).



Click the Print button.

Figure 13-60. Selecting the Print button on the Search Training Codes screen

The Training Codes Reports screen appears (Figure 13-61).

3. Select the report type you want to generate. If you are unsure, you can also click on a report type and view its description (Figure 13-61).
4. Type a report title into the box if you want a report title to appear on the report (Figure 13-61).



3. Select the report type you want to generate.

4. You can add a report title here.

After you select a report type, you can view its description here.

5. Click the Print button to preview the report.

Report Name	Description	Class	Custom
Training Code List	A list of Training Codes	BASIC	False

Report Title: Training Codes

Selected Report Description: A list of Training Codes

Print Exit

Figure 13-61. Generating a training code report

5. Click the Print button to preview the report.

Figure 13-62 shows what the report looks like:

DEER VALLEY UNIFIED SCHOOL DIST			
Training Code List			
Training Codes			
Training Category	Training Code	Description	Active
BRAKE	AS	ANTI SKID	<input checked="" type="checkbox"/>
BRAKE	DAS	DUAL AIR	<input checked="" type="checkbox"/>
BRAKE	H	HYDRAULIC	<input checked="" type="checkbox"/>
BTW	1	BASIC VEHICLE FAMILIARIZATION	<input checked="" type="checkbox"/>
BTW	2	PRECISION TRAINING IN VEHICLE MOVE	<input checked="" type="checkbox"/>
BTW	3	TRANSMISSION CONTROL/SHIFTING	<input checked="" type="checkbox"/>
BTW	4	DEFENSIVE DRIVING	<input checked="" type="checkbox"/>
BTW	5	PASSENGER LOAD/UNLOAD	<input checked="" type="checkbox"/>

Figure 13-62. Training Codes report