Chapter 2

Working with Employee Reminders

This chapter explains how to view, schedule, and manage group and individual employee reminders. In this chapter, the following topics should help you set up and maintain your district's employee reminders:

- Understanding the Reminders Search Screen
- Scheduling Reminders for Groups of Employees
- Viewing an Employee's Reminders
- Searching and Sorting an Employee's Reminders
- Scheduling a Reminder for an Employee
- Editing Employee Reminders
- Generating and Printing Reminder Reports
- Deleting Reminders
- Automatic Features of T.O.M. Employee Reminders

Understanding the Reminders Search Screen

When you open the Employee Management system, the first thing you will see the default view of the Reminders tab (Figure 2-1). This tab displays today's date, the number of records found, and all employees who have reminders for tasks that are past due or due within the warning period. This ensures that all important reminders are communicated to you as soon as possible.

The Reminders search screen consists of these subtabs:

- Due Now Subtab
- Other Options Subtab
- Sorting Subtab

Due Now Subtab

The Due Now subtab on the Reminders search screen is the first screen you see when you launch the Employee Management system.

The Employee Management system tracks reminders and lets you know when you launch the system which ones are due within the warning period to ensure that all important reminders are communicated to you as soon as possible. The warning period is the number of days before a particular task's due date that you wish to be alerted of an impending reminder.

Notice that there are several Category and Reminder types in the graphic below. For example, you can see that the Training Category has several Reminder types associated with it: CPR, Refresher, and First Aid. When you add category and reminder types to the Employee Management system, you can specify their warning period. For example, you might specify that you want to be notified 15 days prior to the due date of a CPR training course.

NOTE: You can learn more about adding Category and Reminder types in Chapter 5 of the Getting Started section.

Figure 2-1. Due Now subtab of the Reminder search screen

Other Options Subtab

When you click the Other Options tab on the Reminders screen (Figure 2-2), you can select additional search options. For example, you can search for reminders with a particular status (such as just Overdue) or a specific category or type. You can also combine these options with general employee search options so that you can view the employee reminder records using a status, category, and type.

NOTE: You can also change the way you view reminder records by combining an employee search with this screen. See Combining Reminder Search Options with Employee Search Options for more information about this feature.

Figure 2-2. Other Options subtab

You can select the following options to search reminder records:

- **Overdue.** Allows you to view employee reminder records that are past their due date.
- **All Pending.** Allow s you to view all employee reminder records that have not been marked as complete.
- **All.** Allows you to view all employee reminder records in the database, including those that have been marked completed.
- **Due within X (days).** Allows you to view the records that are due within the number of days you specify by typing in the value or by clicking the up and down areas to change the displayed value.
- **Reminder Category.** Allows you to select the reminder category you want to view. Default options include Training and Evaluation.
- **Reminder Type.** Allows you to select the reminder type you want to view. Default options include Annual and BTW (Behind the Wheel Training).

NOTE: You can add categories and tasks to the Employee Management system by selecting File>Reminders. This is discussed in Chapter 5 of the Getting Started section.

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① *T.O.M Tip*

What if I pick the wrong viewing options or the results aren't what I expected?

If you select the wrong category or type before you click the Find Now button, you can select the blank option, which is the first row, in the appropriate pull-down menu to reset those fields.

If the results are not what you expected after you click the Find Now button, you can start over by clicking the Reset button to clear your selections and the employee reminder records. Then, click Find Now to repopulate the screen.

To search for reminders:

1. Click the Other Options subtab on the Reminders screen (Figure 2-3). The Employee Management system displays the Other Options screen.

Click here to display search options.

Figure 2-3. Other Options subtab

2. Select the options you want to use to search the reminders.

ⓘ **T.O.M Tip**	**Do I have to complete the entire screen?** No. You do not need to complete all the fields on the Reminders tab to search reminder records. In fact, if you want to view all employees who have reminders, you can leave all the fields blank and then click the Find Now button. **I completed the screen, but nothing happened. What's wrong?** If this happens, click Reset. This clears any other criteria you might have selected on other screens. Then, select your absence criteria again, and click Find Now.

3. Click the Find Now button. The Employee Management system uses your selections to search reminders and displays the results.

4. Look at the screen to see how many records are displayed (Figure 2-4).

Figure 2-4. Results of searching reminder recordss

Sorting Subtab

To make the employee reminders more useful to view, print, or generate reports from, you can sort them by various fields. You can select up to three of these options as your sort criteria. Also, after you select a sort option, you can select ascending or descending as the sort order.

ⓘ T.O.M Tip

At what point can I sort employee reminder records?

You can sort employee reminder records at any point. When you sort employee reminder records, you are sorting displayed records, even if you are only viewing only a few records from your database.

What if I pick the wrong sorting options or the results aren't what I expected?

If the results are not what you expected after you click the Find Now button, you can start over by clicking the Reset button to clear your selections and the employee reminder records. Then, click Find Now to repopulate the screen.

However, if you have searched the records and click Reset and then Find Now, the records displayed are the same as those that displayed when you last started the system.

To sort employee reminder records:

1. Click Sorting on the Reminders screen (Figure 2-5). The Employee Management system displays the sorting options.
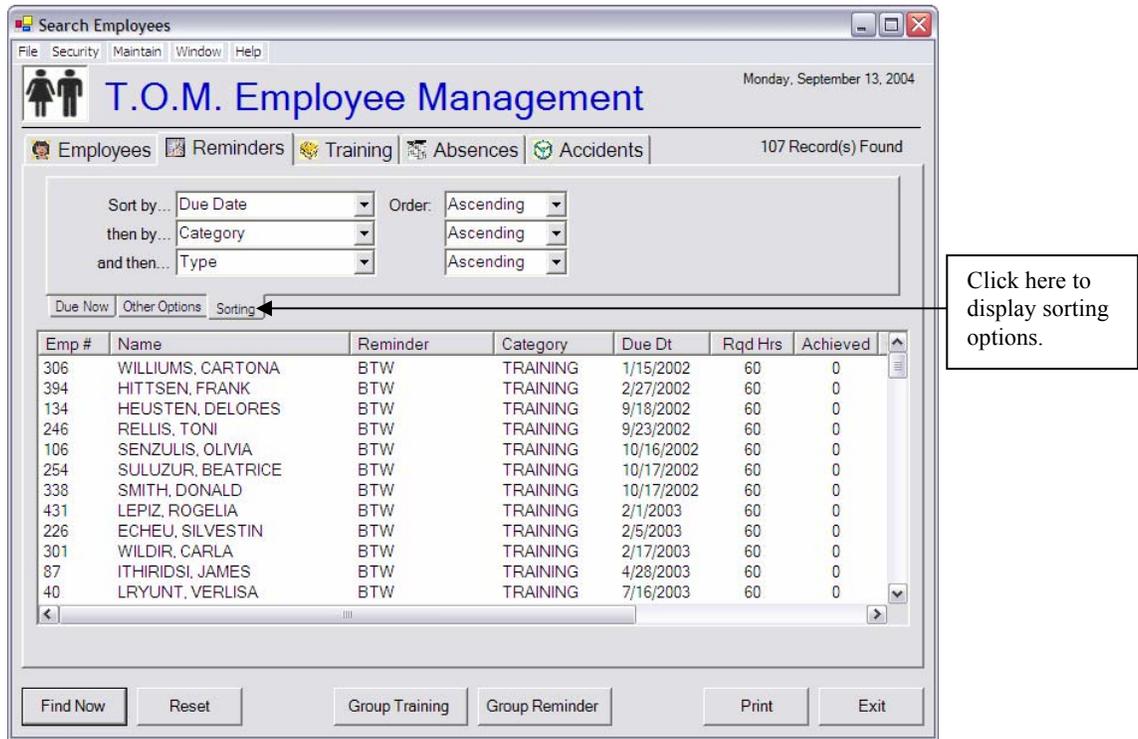
Figure 2-5. Sorting subtab

2. Select sorting criteria and order options by clicking the pull-down menus and selecting options in the pull-down lists. You can sort the data up to three times (Figure 2-6).
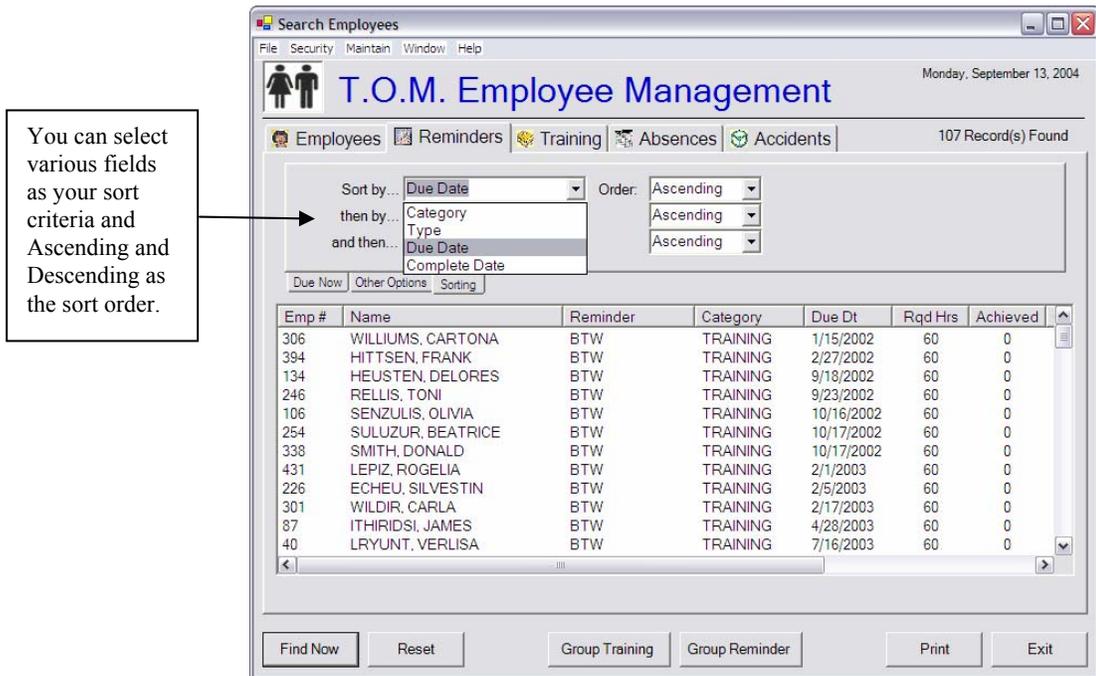

Figure 2-6. Selecting employee reminder sorting options

3. Click the Find Now button to retrieve the selected employee reminder records and sort them in the desired order. The Employee Manager system updates the displayed records in the specified sort order. Figure 2-7 shows the results of sorting reminders by category and then by type:
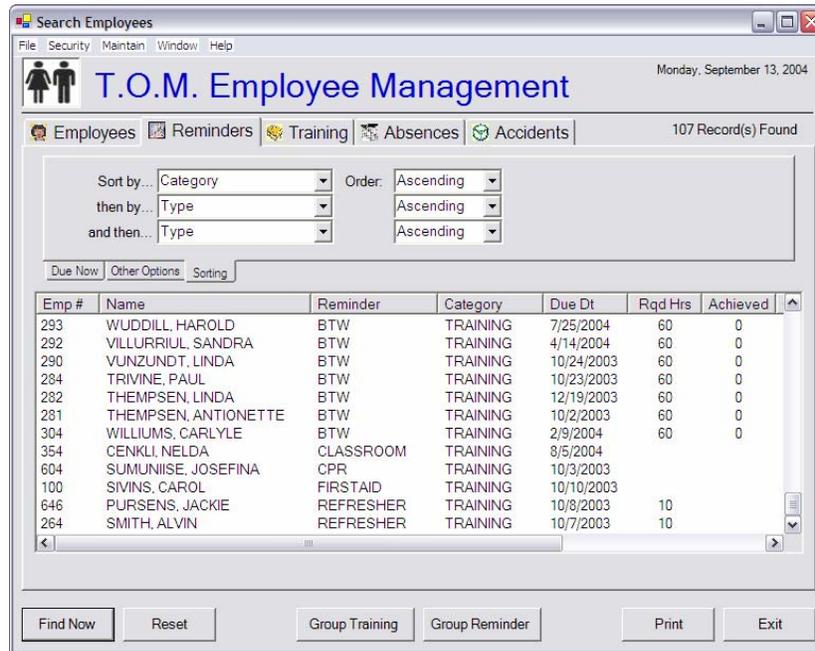
Figure 2-7. Results of sorting reminders

Combining Reminder Search Options with Employee Search Options

In addition to searching reminders by clicking on the Other Options subtab, you can also search for employees who have reminders associated with them. For example, you could search for all employees with an employee type of *Driver* who have a training reminder associated with them.

To combine reminder search options with employee search options:

1. Click the Employees tab. The Employee Management system displays the Employees screen.

2. Click the Reset button to clear the screen. The Employee Management system clears the screen.

3. Select the criteria you want to use to search for employees. Figure 2-8 shows selecting the Employee Type of Driver for the search criteria.
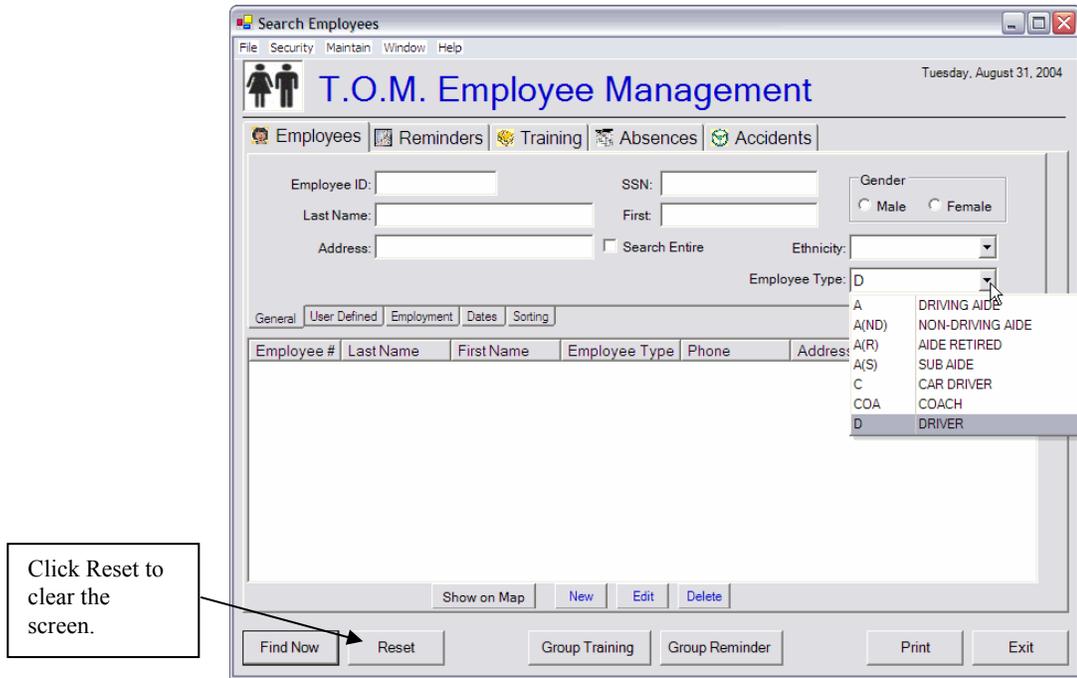
Figure 2-8. Selecting Driver as the Employee Type

4.   Select the Reminders tab.

5.   Select the criteria you want to use to search for reminders. Figure 2-9 shows selecting the Reminder Type of Training for the search criteria.
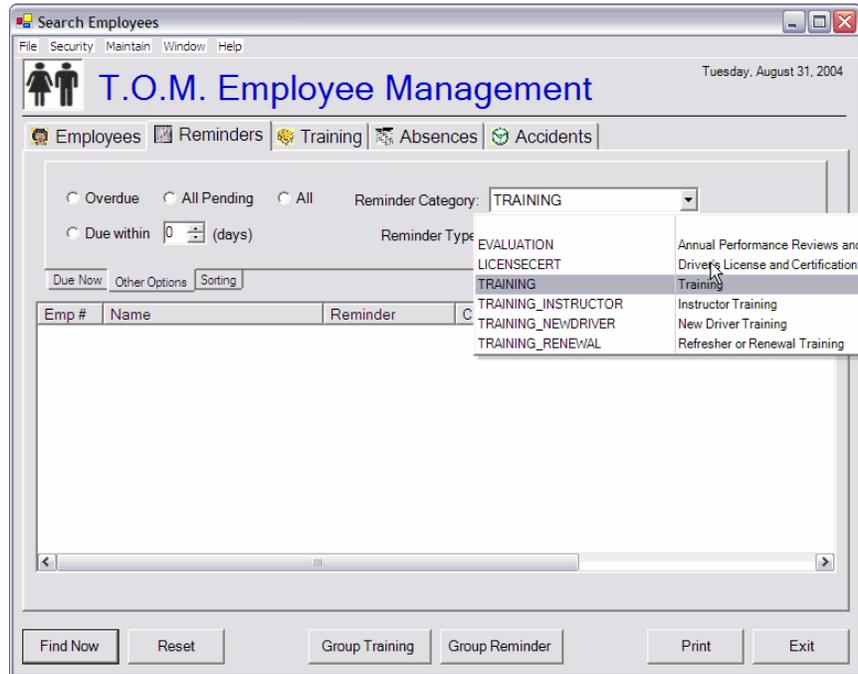

Figure 2-9. Selecting Training as the Reminder Type

6.   Click the Find Now button. The Employee Management system uses the selected criteria to search employee records displayed on the Employees tab.

Figure 2-10 shows the results of searching for employees who are classified as drivers AND who have a training reminder associated with them:
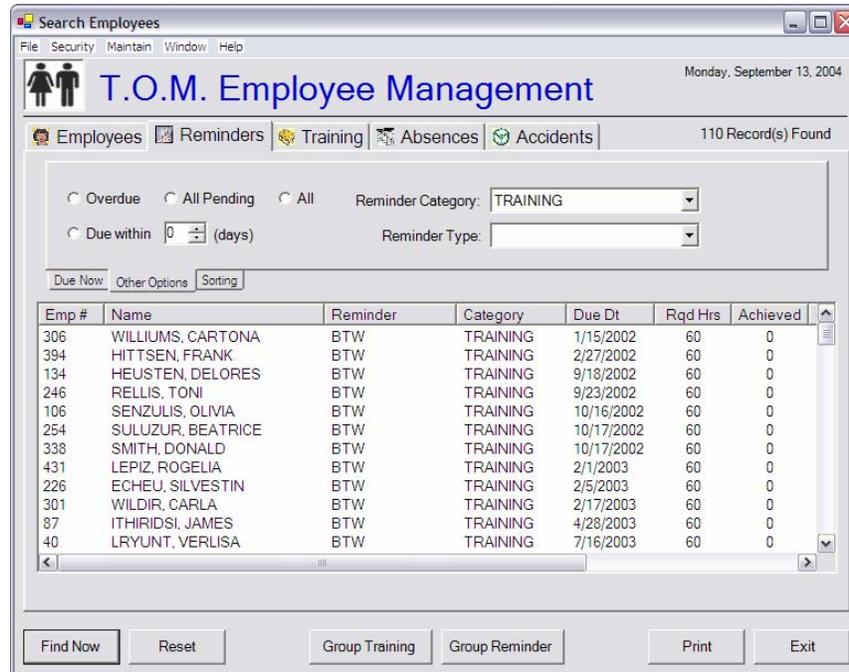
Figure 2-10. Results of combining reminder search options with employee search options

Scheduling Reminders for Groups of Employees

Although you can set up reminders for individual employees as described later in this chapter, it is far more efficient to set up reminders for an entire group of employees. This not only saves time, but it reduces input errors that might occur from entering so many separate reminders.

Even though you are setting up a group reminder, you can customize the due date for each employee. For example, one of the set up options allows you to select the employee's birthday as the due date. Suppose you manage the data for 400 employees. If you select Next birthday as your reminder date option, you are creating one reminder that is customized for all employees because it is associated with their birthday.

This section consists of the following:

- Adding a Group Reminder for All Employees
- Adding a Group Reminder for a Selected Group of Employees
- Understanding the Group Reminder Screen

Adding a Group Reminder for All Employees

1.   Click the Employees tab. The Employee Management system displays the Employees screen.

2. Click the Reset button to clear the screen. The Employee Management system clears the screen (Figure 2-11).

Click Reset to clear the screen.

Click Find Now to search for and retrieve records.

Click Group Training to add a group reminder to the system.
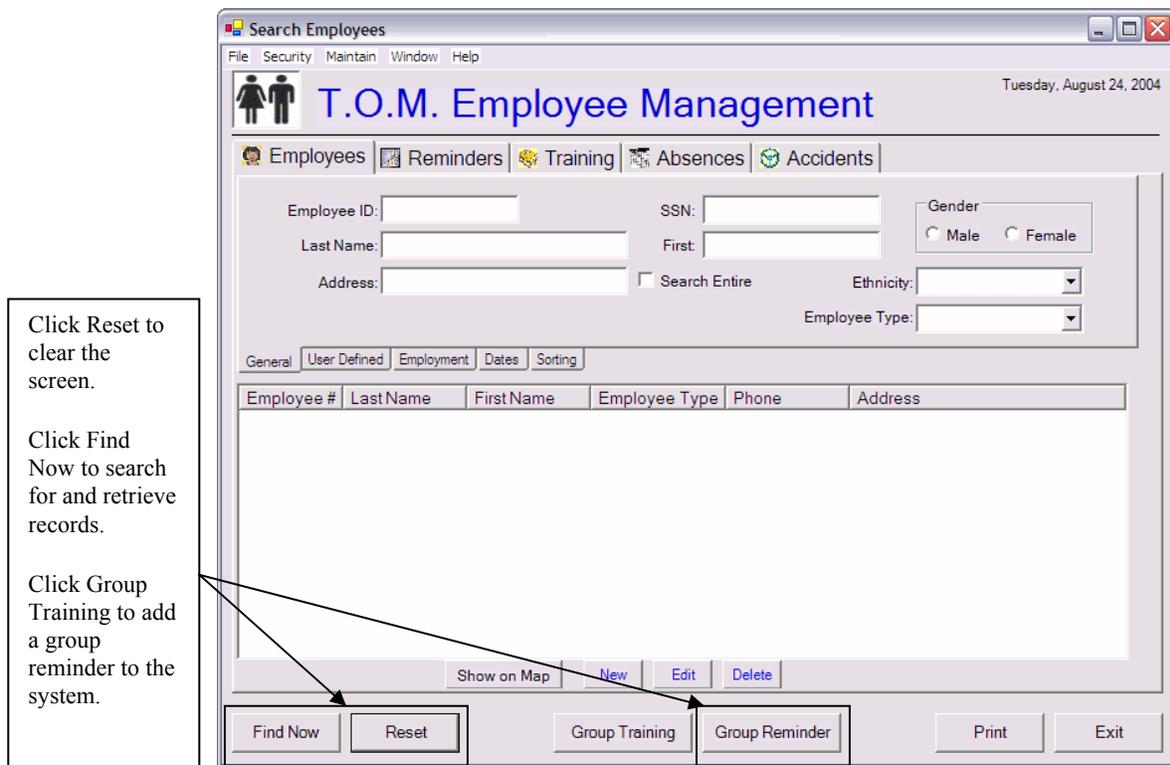
Figure 2-11. Clearing the Employee screen

3. Click the Find Now button to retrieve all the employee records in the database.

4. Click the Group Reminder button. The Employee Management system displays the Schedule Reminder/Task screen.

5. Select options from the drop-down lists or type information into the fields. See the detailed discussion of the various fields in the Group Reminder screen later in this chapter for more information.

NOTE: You must select a Category, Type, and Due Date (such as Next Birthday). These are required fields. If you click the Schedule Now button before you complete these fields, the Employee Management system displays a warning.

6. Click the Add All button to add all employees to the group request.

    Figure 2-12 shows adding a training reminder on the next birthday of all employees.

Figure 2-12. Adding all available employees to a group reminder

7. Click the Schedule Now button to add the reminder to the database. The Employee Management system displays a progress bar at the bottom of the screen to indicate it is adding the reminder to the database. When it is finished, you will see a dialog indicated that this process is complete.

Adding a Group Reminder for a Selected Group of Employees

In addition to customizing the due dates for group reminders, you can create group reminders for selected groups of employees that you want to include in the reminder. The Group Reminder screen fills in the Available Employees list with those employees found in your employee search. From this list, you can either select all of the found employees or further refine the list of employees to build the reminder for by individually adding them to the Selected Employees list. For example, you can search employee records to display all the drivers in your database. You could then add all the drivers to the group reminder, or you could select only certain drivers for inclusion in the group reminder.

NOTE: You must add at least one employee to the reminder. If you do not, the Employee Management system displays a message if you click the Schedule Now button.

ⓘ *T.O.M Tip*	**What if I added the wrong employees to a reminder?** If you have not added the task to the database, you can click Reset List or click the Remove All button to remove all employee names from the Selected Employees box. To remove only some employees from the Selected Employees box, select their names, and click the Remove button.

To create a group reminder for a group employees:

1. Click the Employees tab. The Employee Management system displays the Employees screen.

2. Click the Reset button to clear the screen. The Employee Management system clears the screen.

3. Select the fields you want to use to select employee records. Figure 2-13 shows selecting Driver from the Employee Type drop-down list on the Employees search screen.
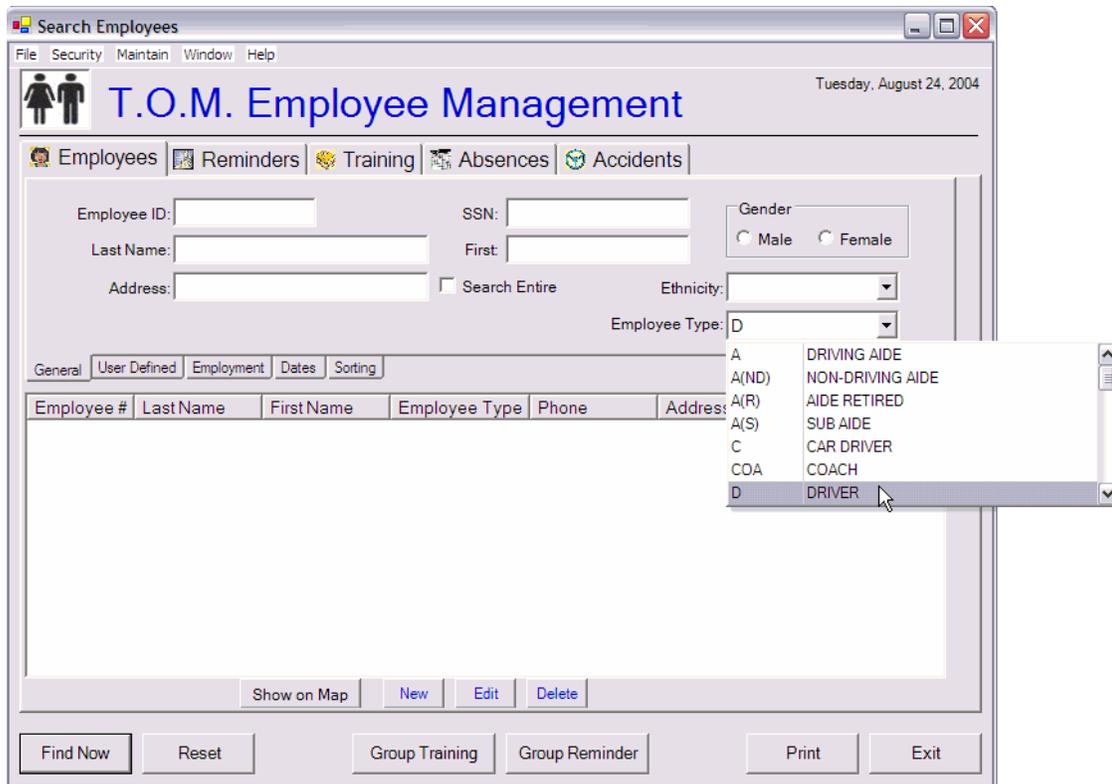
Figure 2-13. Example of selecting Employee search options

4. Click the Group Reminder button. The Employee Management system displays the Schedule Reminder/Task screen.

5. Select options from the drop-down lists or type information into the fields.

NOTE: You must select a Category, Type, and Due Date (such as Next Birthday). These are required fields. If you click the Schedule Now button before you complete these fields, the Employee Management system displays a warning.

6. To add employees to the group reminder:

    *   Select an employee's name, and then click the Add button.
    *   Select an employee's name, hold down your Shift key, and click another employee's name to select a range of names. Then, click Add.

    OR

    *   Select an employee's name, hold down your Ctrl key, and select another employee's name. Continue this process until you have selected all the employees you want to include in the reminder. Click Add (Figure 2-14).

Figure 2-14. Adding selected available employees to a group reminder

7. Click the Schedule Now button to add the reminder to the database. The Employee Management system displays a progress bar at the bottom of the screen to indicate it is adding the reminder to the database. When it is finished, you will see a dialog indicated that this process is complete.

Understanding the Group Reminder Screen

The Employee Management software allows you to setup both Reminder Categories and Reminder Types. These two reminder classifications are interrelated to each other. Reminder Category is the broad reminder classification, and Reminder Type is a subset of the reminder category. For example, you could have a Reminder Category of Training and three Reminder Types, or reminder subsets, attached to that category (Behind the Wheel, Classroom, and Other).

Consequently, the Employee Management software doesn't allow you to specify a Reminder Type until you have selected a Reminder Category. After you have selected the Reminder Category, the Employee Management system dynamically builds a list of Reminder Types that are assigned to the selected Reminder Category and lets you pick from those types. Using the example above, if you pick Training as the Reminder Category, the Employee Management system displays Behind the Wheel, Classroom, and Other as the Reminder Types.

*   **Category.** Allows you to specify the reminder category. When you select an option from the pull-down menu, the Employee Management system populates the Type pull-down menu with the reminder types associated with the selected category.
*   **Type.** Displays the reminder types that are available for the selected Category.

NOTE: You can add categories and tasks to the Employee Management system by selecting File>Reminders. This is discussed in Chapter 5 of the Getting Started section.

- **Due Date.** The reminder's due date may be one of the following four types:

    1. **Next birthday.** Specifies that the due date is based on each employee's birthday.

    2. **Next anniversary of certification date.** Specifies that the due date based on the upcoming anniversary of the certification date of each employee.

    3. **Specific date.** Allows you to select a specific day from a calendar for the due date, or you can type the due date.

NOTE: If you only type the month and year, the Employee Management system uses the first of the month as the default value.

    4. **License expiration.** Specifies that the due date will occur when each employee's current license expires.

- **Required hours.** Allows you to type in the number of hours that are required for the task (for example, a training class).

ⓘ *T.O.M Tip*	**What are required hours?** Required hours is the amount of time that a task requires before it is considered to be complete. Most reminders that have required hours are usually training requirement reminders. You will learn in *Chapter 5* of the *Getting Started* section how to automatically apply hours to open reminders when you are entering training information into the Employee Management system.

- **Comment.** Allows you to type any comments you want to save with the reminder.
- **Available Employees.** Displays all employees whose records were displayed on the Employees screen.
- **Selected Employees.** Displays the employees you selected for inclusion in the group reminder. You can use the Add, Remove, Add All and Remove All buttons to add employees to the Selected Employees List.

Viewing an Employee's Reminders

1. Click the Employees tab. The Employee Management system displays the Employees screen.

2. Click the Reset button to clear the screen. The Employee Management system clears the screen (Figure 2-15).
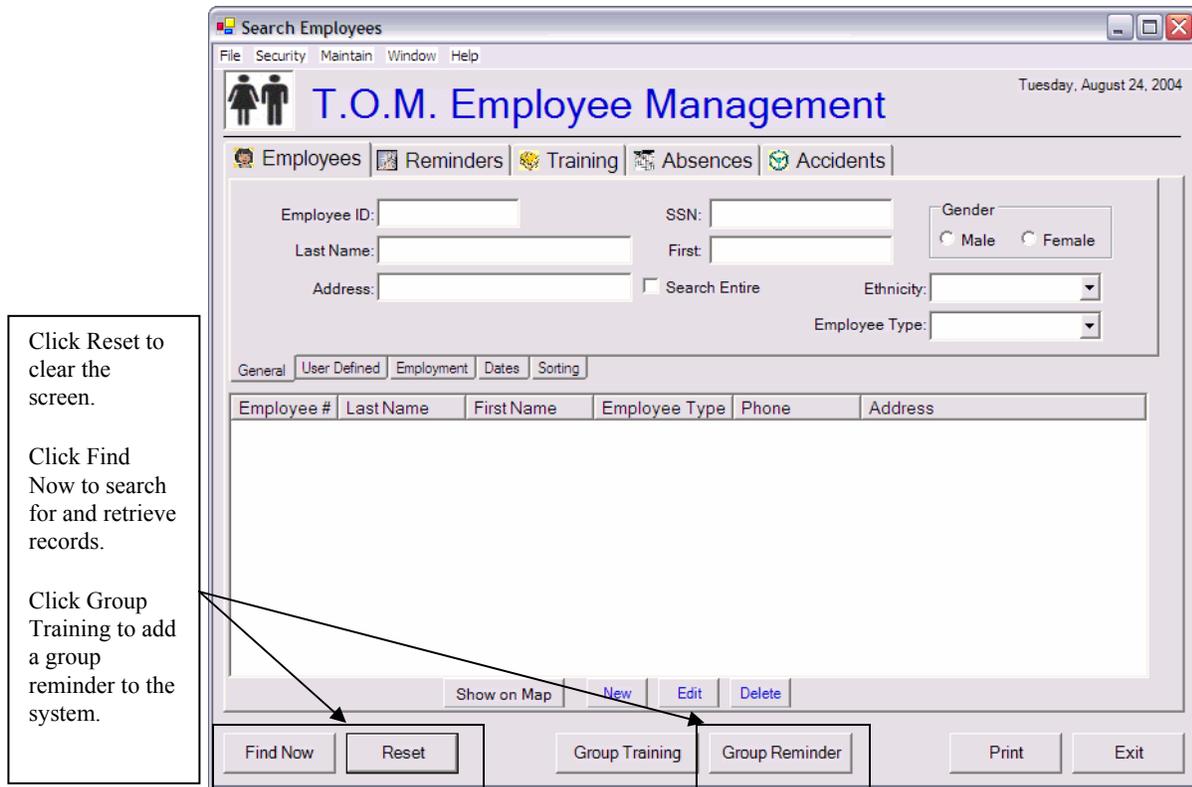
Figure 2-15. Clearing the Employee screen

3. Select the fields you want to use to select employee records. For example, you can type the first few letters of the employee's last name if you want to search for employee records using this field (Figure 2-16).

Example showing a partial last name being used to search employee records.

Figure 2-16. Example of using a partial last name as the search criteria

4. Click the Find Now button to retrieve all the employee records that match your selected criteria.

5. Either:

   - Select the employee whose reminders you want to view, and click the Edit button (Figure 2-16).
   OR
   - Double-click the employee's record.
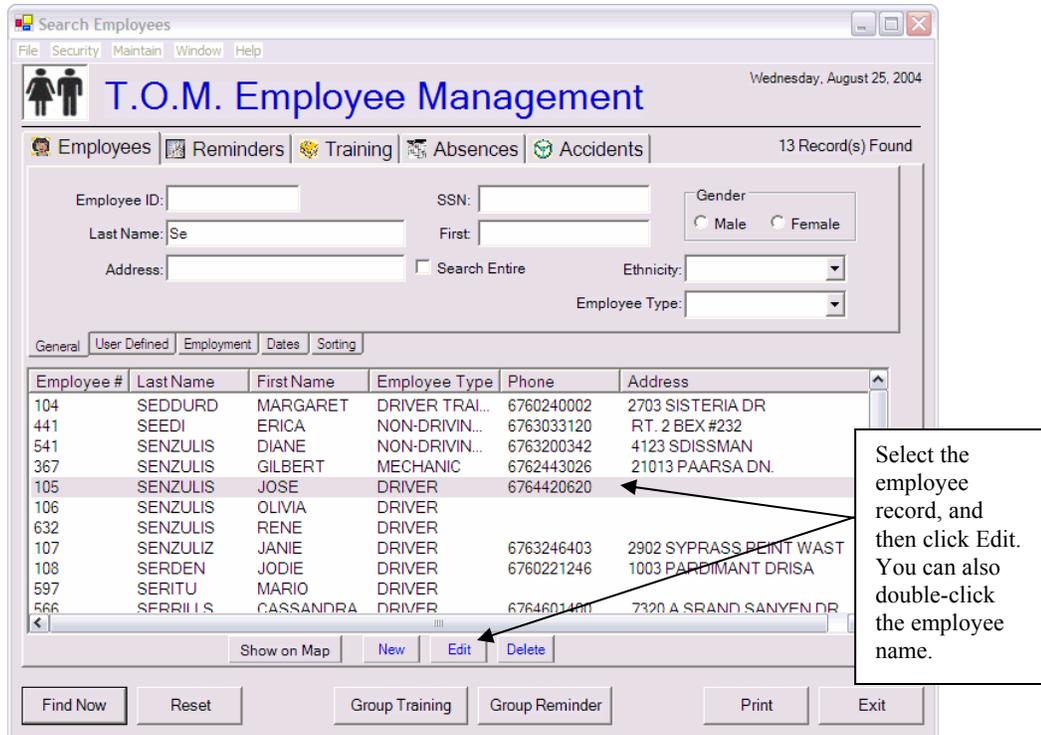
Figure 2-17. Selecting employee records and viewing their reminders /tasks

The Employee Management system displays the employee's record.
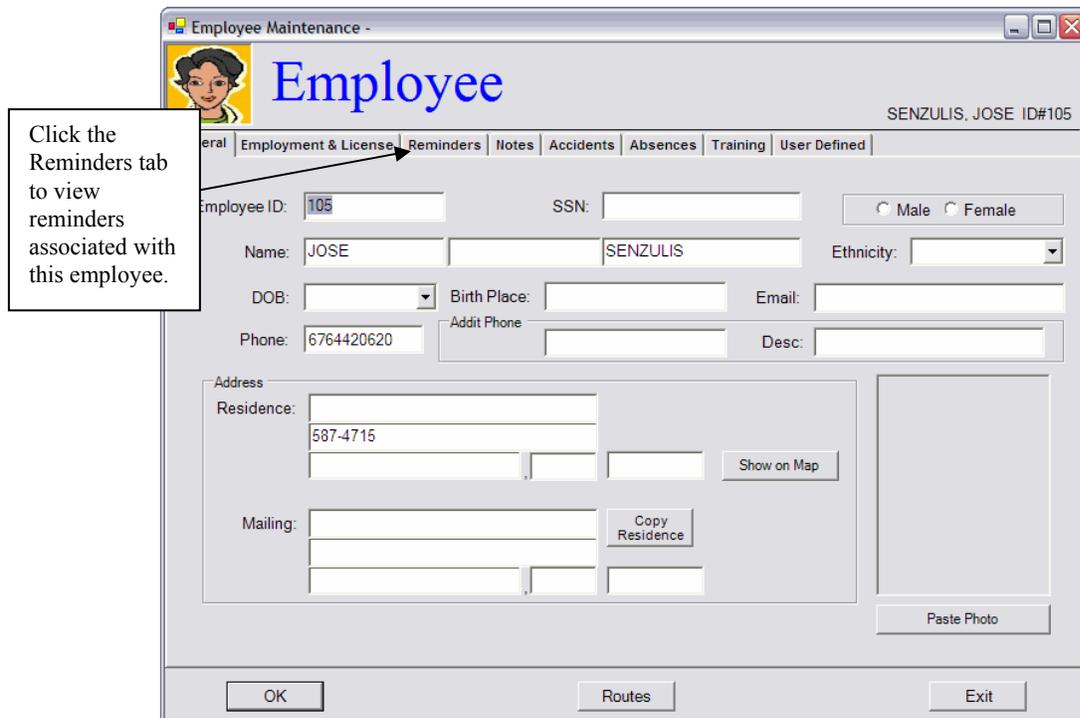
Figure 2-18. Selecting the Reminder tab in the Employee screen

6. Click the Reminders tab. The Employee Management system displays any reminders associated with the selected employee.
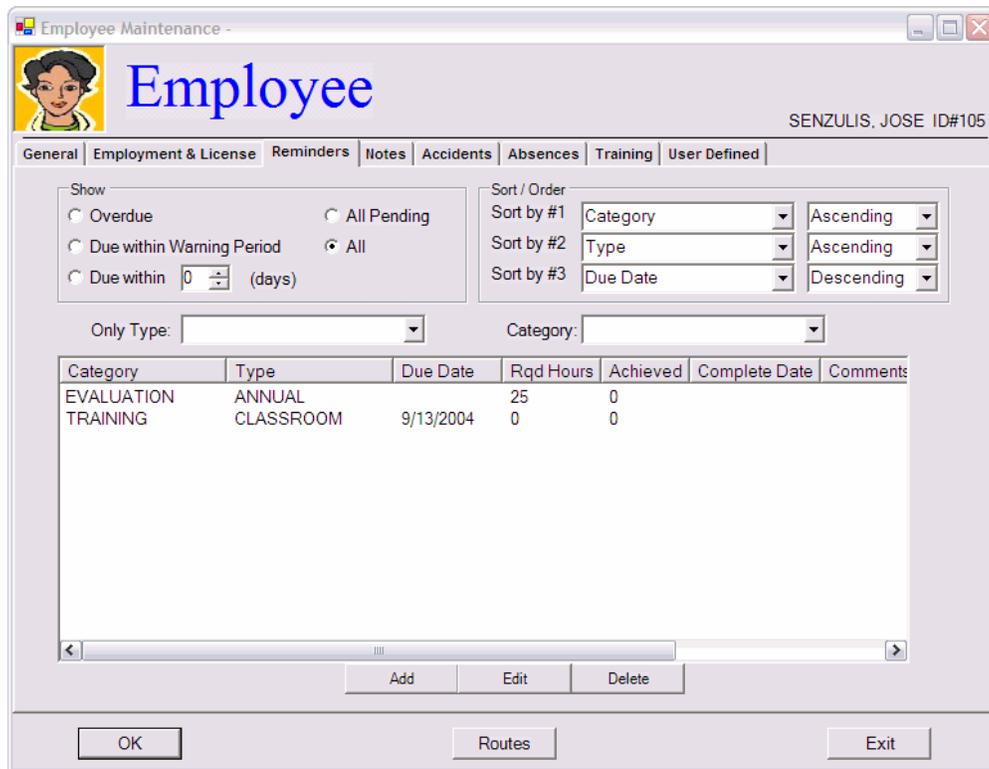
Figure 2-19. Viewing an employee's reminders

7. Either:

    • Select search or sort options as described in the next section.
    OR
    • Click the OK or Exit button to close the screen.

Searching and Sorting an Employee's Reminders

When you are viewing an employee's reminders, you can select the following options to customize your view of an employee's reminders:

• **Overdue.** Allows you to view employee reminder records that are past their due date.

• **Due Within Warning Period.** Allows you to view only those tasks that are due within the warning period.

• **Due within X (days).** Allows you to view the records that are due within the number of days you specify by typing in the value or by clicking the up and down areas to change the displayed value.

• **All Pending.** Allow s you to view all employee reminder records that have not been marked as complete.

• **All.** Allows you to view all employee reminder records in the database, including those that have been marked completed.

- **Only Type.** Allows you to select the reminder type you want to view.
- **Category.** Allows you to select the reminder category you want to view.

NOTE: You can add categories and tasks to the Employee Management system by selecting File>Reminders. This is discussed in Chapter 5 of the Getting Started section.

You can also sort employee tasks and reminders by Category, Type, Due Date, or Complete Date. You can select up to three of these options as your sort criteria. Also, after you select a sort option, you can select ascending or descending as the sort order.

	What if I want to search for but not sort the records?
	You do not have to search for *and* sort the records. You can search for *or* sort them.
ⓘ *T.O.M Tip*	

To search and sort an employee's reminder records:

1. Repeat the steps listed in the previous section for viewing an employee's reminders.

2. To search an employee's reminder records:

    - Select a status option.
    - Select a reminder category.
    - Select a reminder type.
    OR
    - Select any combination of these options.

3. To sort an employee's reminder records, select sorting criteria and order options by clicking the pull-down menus and selecting options in the pull-down lists. You can sort the data up to three times.

4. Click the OK or Exit button to close the screen.

Scheduling a Reminder for an Employee

You can schedule a task for an individual employee rather than a group of employees. When you create a new reminder for an employee, you can also specify the number of hours required for the reminder and add up to three attachments as well as comments to the reminder. However, if you need to create a reminder for a large number of employees, it is easier and more efficient to schedule a group reminder.

This section includes the following:

- Adding a Reminder for an Individual Employee
- Understanding the Employee Reminders Screen
- Editing Employee Reminders
- Marking Reminders Complete
- Adding Attachments to Reminders
- Viewing and Clearing Attachments

Adding a Reminder for an Individual Employee

1. Select an employee record on the Employees tab by double-clicking on it or by selecting it and then clicking Edit. The Employee Management system displays the employee's record.

2. Click the Reminders tab.

3. Click the Add button. The Employee Management system displays the Reminders screen (see Figure 2-20).

Click Add to create a new employee reminder.
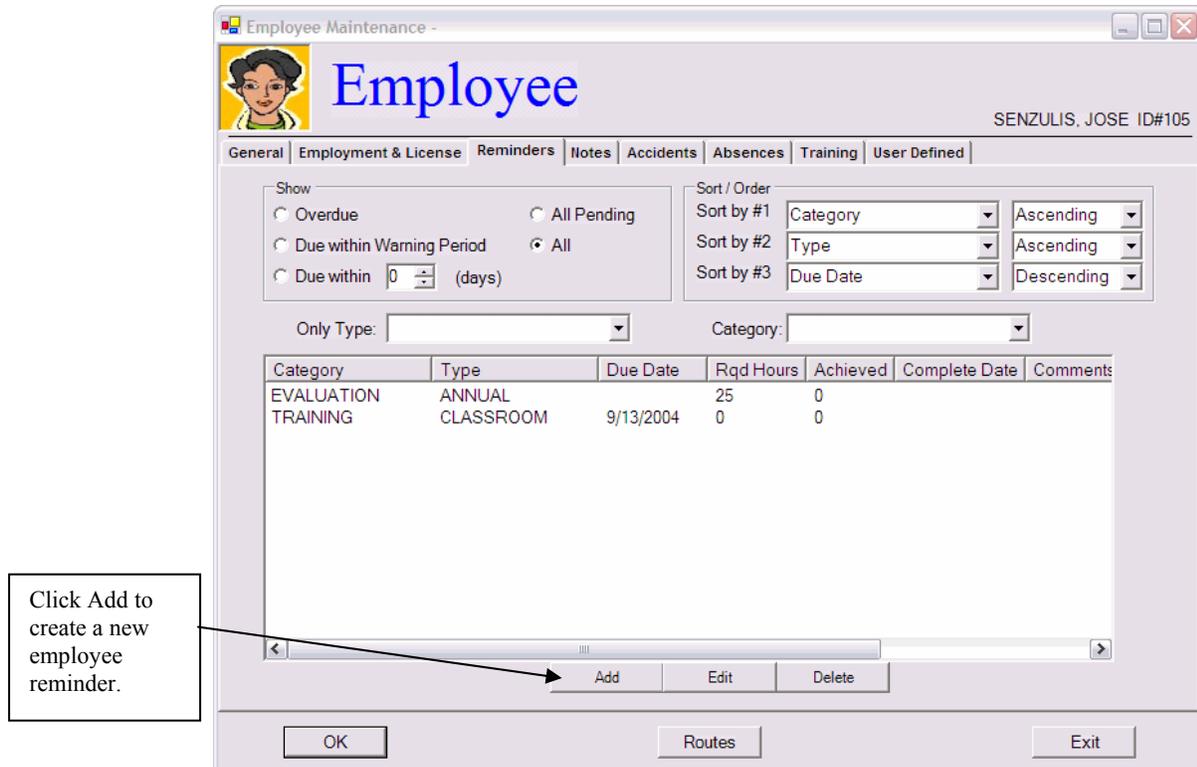
Figure 2-20. Adding a new employee reminder

4. Select or type information into the fields. For a detailed description of each field, see the next section.

Figure 2-21 shows adding a reminder for an individual employee:

You must select a Category and Type; these are required fields.

Click OK to save the reminder.

Click Exit to close the screen without saving the reminder.

Figure 2-21. Adding a reminder to an employee's record

5. Click the OK button to save the reminder. The Employee Management system closes the screen and updates the Reminders screen to display the reminder you just added.

Understanding the Employee Reminders Screen

The Employee Management software allows you to setup both Reminder Categories and Reminder Types. These two reminder classifications are interrelated to each other. Reminder Category is the broad reminder classification, and Reminder Type is a subset of the reminder category. For example, you could have a Reminder Category of Training and three Reminder Types, or reminder subsets, attached to that category (Behind the Wheel, Classroom, and Other).

Consequently, the Employee Management software doesn't allow you to specify a Reminder Type until you have selected a Reminder Category. After you have selected the Reminder Category, the Employee Management system dynamically builds a list of Reminder Types that are assigned to the selected Reminder Category and lets you pick from those types. Using the example above, if you pick Training as the Reminder Category, the Employee Management system displays Behind the Wheel, Classroom, and Other as the Reminder Types.

When you schedule a reminder for an employee, you can set the following options:

*   **Category.** Allows you to select the reminder category you want to view.
*   **Type.** Allows you to select the reminder type you want to view.
*   **Due Date.** Allows you to select a specific day from a calendar for the due date. You can also type the due date, but if you only type the month and year, the Employee Management system uses the first of the month as the default value.

- **Complete Date.** Allows you to select a specific day from a calendar for the date the task was completed. You can also type the complete date, but if you only type the month and year, the Employee Management system uses the first of the month as the default value.
- **Completed.** When selected, indicates the task has been completed. See the Marking Reminders Complete section for more information about this feature.

NOTE: Complete Date and the Completed checkbox are both required if you complete either of these fields.

- **Hours.** Allows you to type in the number of hours required by the task (Required) as well as the number of hours that have been completed (Achieved).
- **Attachments.** Allows you to attach a document to the reminder. For information about using this feature, see the detailed discussion on adding attachments in the next section. See the Adding Attachments to Reminders and Viewing and Clearing Attachments sections later in this chapter for more information about this feature.
- **Comments.** Allows you to type any comments you want to save with the task.

Marking Reminders Complete

1. Either:

   - Select the reminder you want to edit, and click the Edit button.
   OR
   - Double-click the employee's reminder.

   The Employee Management system displays the Reminders screen.

2. To mark the task as completed:

   - Click the Complete Date pull-down menu. The Employee Management system displays a calendar so you can select a date.
   OR
   - Type the complete date into the box. If you only type the month and year, the Employee Management system uses the first of the month as the default value.

3. Click in the Complete box to mark the reminder as completed.

4. Type the number of hours achieved.

5. Click OK to save the changes.

   Figure 2-22 shows an example of a reminder that has been marked complete:

Figure 2-22. Sample of marking a reminder complete

Adding Attachments to Reminders

What are attachments?

Many times it is helpful to include with a reminder an attached document that gives the user more information about this reminder (for example, a class agenda, state requirements, or a photograph). The T.O.M. Employee Management software has the capability.

Attachments are nothing more than links or pointers to another document on the computer that is considered relevant to the employee reminders (for example, a medical report on a medical reminder). By allowing you to "attach" these documents to a reminder, the T.O.M. Employee Management software makes it easy for you to quickly open one of these associated documents while viewing the Employee Reminder.

Warning notes about attachments:

Because attachments are nothing more than links to document files you must be aware of two points:

1. Make sure that the actual document file is in a location that all Employee Management users that will work with reminders can access the file. If you add an attachment to a document that is on your personal computer and another user tries to open that link but doesn't have access to that file, that user will receive an error message.

2. If you attach a document file to a reminder that requires a special program to open (such as an Adobe Photoshop) that a user does not have, that user will receive an error if he tries to open that attached file from his computer.

To add an attachment to the reminder:

1. Either:

    - Select the reminder you want to edit, and click the Edit button.

    OR

    - Double-click the employee's reminder.

    The Employee Management system displays the Reminders screen.

2. Click the Browse button (Figure 2-23).

Click Browse to navigate to the file you want to attach to the reminder.
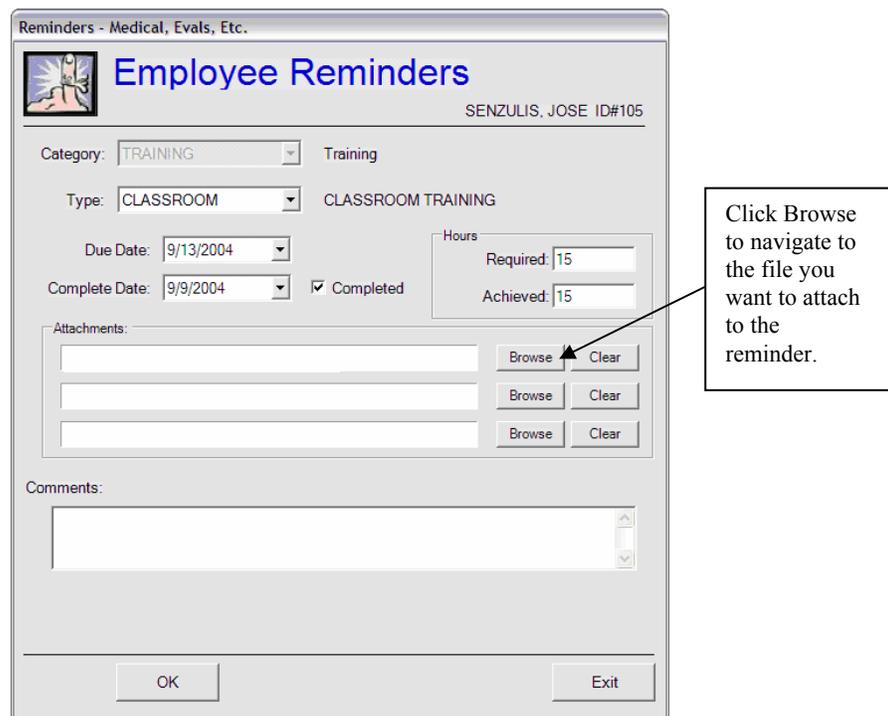
Figure 2-23. Adding an attachment to a reminder

3. Navigate to where the document is stored, select it, and click Open.
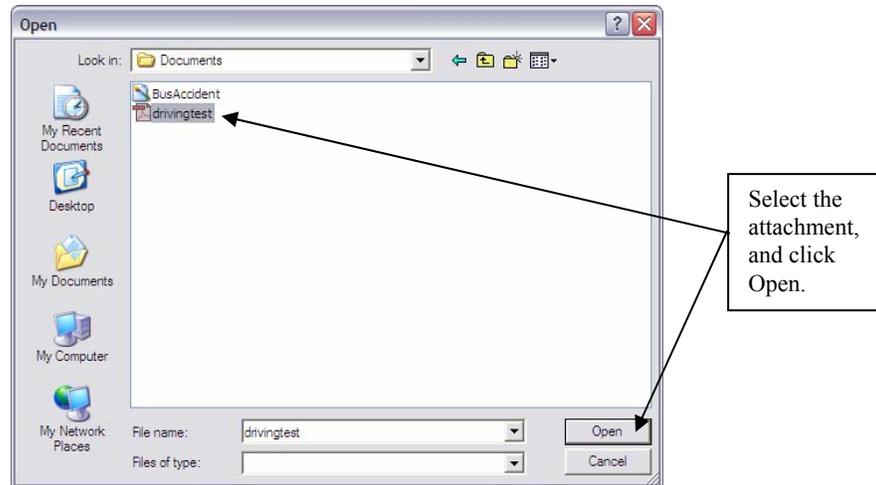
Figure 2-24. Selecting an attachment

The Employee Management system adds the attachment to the reminder. You can add up to three attachments to the reminder (Figure 2-25).

Figure 2-25. Adding an attachment to an employee's record

4. Click the OK button to save the reminder. The Employee Management system adds the attachment to the reminder.

Viewing and Clearing Attachments

To view attachments, follow these steps:

1. Either:

    •   Select the reminder you want to edit, and click the Edit button.
    OR
    •   Double-click the employee's reminder.

    The Employee Management system displays the Reminders screen.

2. Click on the attachment you want to view (Figure 2-26).
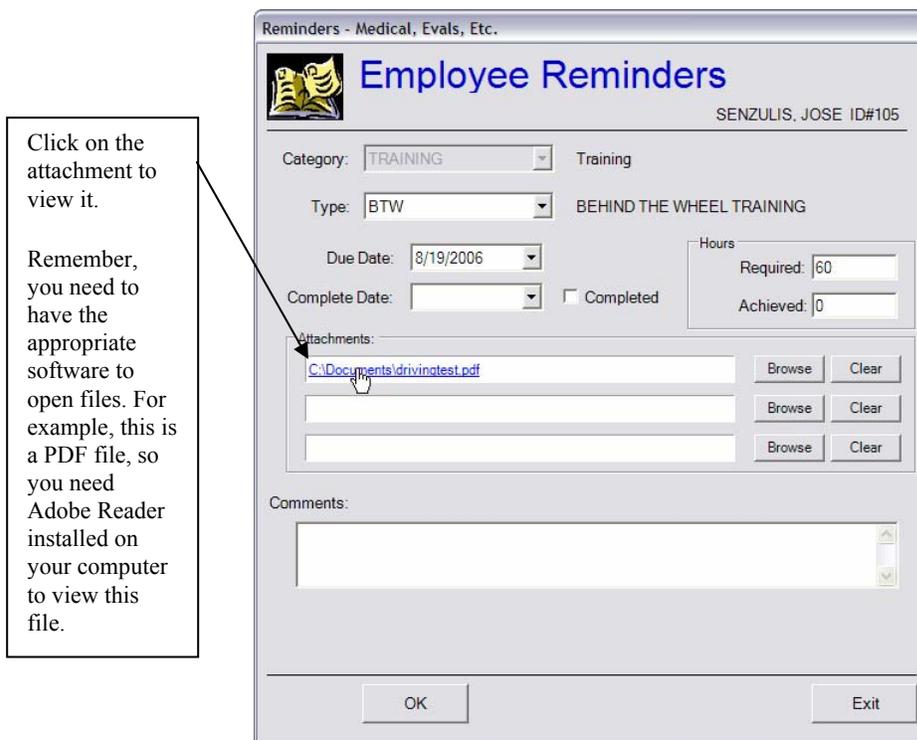
Figure 2-26. Viewing an attachment

The attachment in Figure 2-26 is a PDF file which is viewable in Adobe Reader. Notice how the PDF file is viewed in that software (Figure 2-27) and not within the Employee Management system. Because attachments are viewed outside the Employee Management system, you need to have the software required by the file type. *If you do not have the appropriate program to open the attachment, you will not be able to view it.*

Also notice that the file has been added from the c: drive. Only those who have access to the c: drive will be able to access the file.
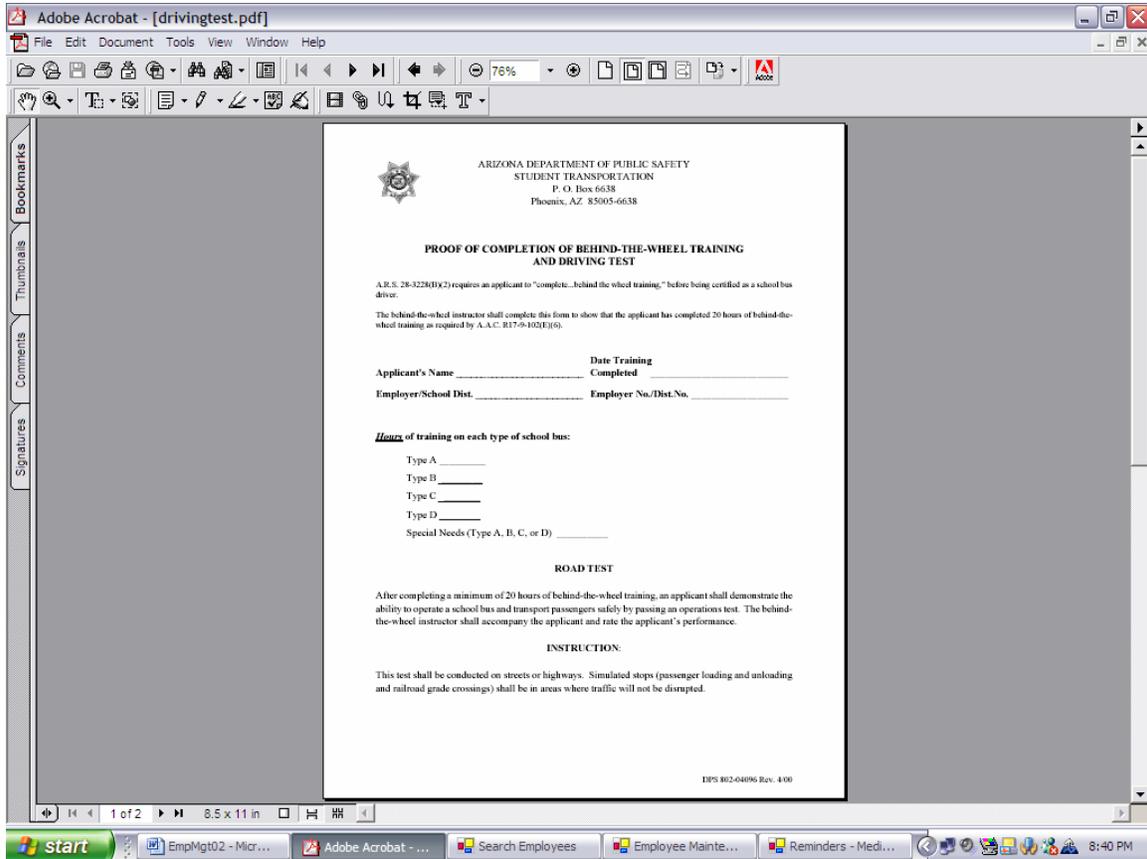
Figure 2-27. Viewing a PDF attachment in Adobe Reader

To clear attachments:

1. Either:

   • Select the reminder you want to edit, and click the Edit button.

   OR

   • Double-click the employee's reminder.

   The Employee Management system displays the Reminders screen.

2. Click the Clear button to remove the attachment from the reminder.

Figure 2-28. Clearing an attachment

3.   Click the OK button to save your changes and close the screen.

Editing Employee Reminders

After you add a reminder to the Employee Management system, you can easily edit it. For example, one common editing task you need to do is to mark the reminder as completed. When you mark a reminder as completed, it will no longer appear by default in the Reminders screen when you open the Employee Management system.

The procedure below describes specifically how to mark an employee reminder as complete. However, if you want to edit the reminder for other reasons, the same basic steps for accessing the record and updating it are the same as those described below.

To edit a reminder:

1. Either:

    -   Select the reminder you want to edit, and click the Edit button.
    OR
    -   Double-click the employee's reminder.

    The Employee Management system displays the Reminders screen.

2. Make your changes to the reminder.

3. Click OK to save your changes.

Generating and Printing Reminder Reports

You can generate and print several types of reminder reports for an employee or a group of employees by clicking the Print button. When you click the Print button, the Employee Management system displays a dialog that allows you to select the type of reminder report you want to generate and to type in its title.

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

Deleting Reminders

You can easily delete an employee's reminder from the Employee Management system.

1. Select an employee record on the Employees tab by double-clicking on it or by selecting it and then clicking Edit. The Employee Management system displays the employee's record.

2. Click the Reminders tab.

3. Select the Reminder you want to delete.

4. Click Delete. The Employee Management system displays a dialog asking if you want to delete the reminder.
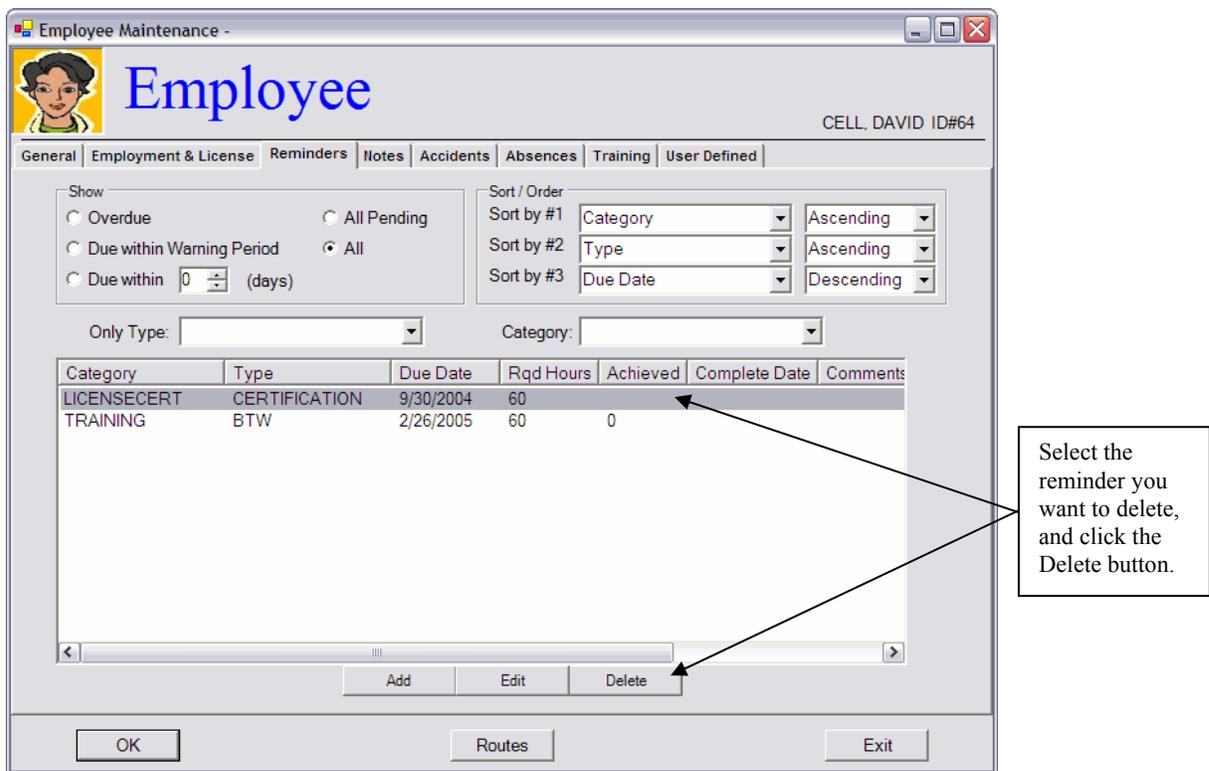

Figure 2-29. Deleting reminders

5. Click the OK button. The Employee Management system deletes the reminder from the employee's record.

Automatic Features of T.O.M. Employee Reminders

There are two ways you can set up the Employee Management system to automatically handle employee reminders:

*   Using Training Hours to Automatically Closing Reminders
*   Setting up a Reoccuring Reminder

Using Training Hours to Automatically Closing Reminders

When you are entering training information to an employee's record, you have the option of having the Employee Management system automatically apply those hours to the employee's open training reminder. This not only saves you time—it also means that you do not have to access a different area of the application to reenter the same data.

NOTE: For more information about using this feature, see Chapter 4 of the User's Guide section.

The screen you will see when you are entering training information looks like:

Figure 2-30. Automatically applying training hours to reminders

Setting up a Reoccuring Reminder

When you set up a reminder type, you can specify that the Employee Management system automatically re-schedules the reminder based on its completion, when it is due, or whichever of these events occurs first.

NOTE: You can set up a reoccurring reminder when you set up a Reminder type. This is discussed in detail in Chapter 5 of the Getting Started section.

The screen you will see when setting up reoccurring reminders looks like:

Options you can set for reoccurring reminders. See *Chapter 5* in the *Getting Started* section for more information about this feature.

Figure 2-31. Automatically scheduling reminders