Chapter 1

Working with Employee Records

This chapter explains how to manage employee information, including how to search for employee records; adding, editing, and deleting employee records; and locating employee addresses on a map using Microsoft MapPoint. You can also generate and print reports of employee records. In this chapter, the following topics should help you set up and maintain your district's employee data:

- Searching Employee Records
- Understanding Employee Records
- Adding and Editing Employee Records
- Generating and Printing Employee Reports
- Viewing Employee Addresses on a Map using Microsoft MapPoint
- Deleting Employee Records

Searching Employee Records

There are several ways that you can search for employee records. The Employees tab on the main screen of the Employee Management system allows you to search employee records by selecting or typing information from the following screen (see Figure 1-1):

- General Subtab
- Employment Subtab
- Dates Subtab
- User Subtab
- Sorting Subtab

You can search by selecting criteria on only one of the subtabs, or you can search employee records by using selecting options on more than one subtab, or screen. For example, you could search for all drivers whose licenses are due to expire within a specified date range.

ⓘ ***T.O.M Tip***

When I search using a field such as gender, why doesn't the Employment Management system return any records? I know the database has many women in it.

It depends on how your set up your employee records. Using the example above, if you do not specify employee gender when you add employees to the database, the Employee Management system does not return any records when you search the database using only this criteria because you didn't specify it in any employee records.

To search employee records:

1. Click the Employees tab in the Employee Management search screen.

2. Click the Reset Button to ensure you are starting with a fresh search session.

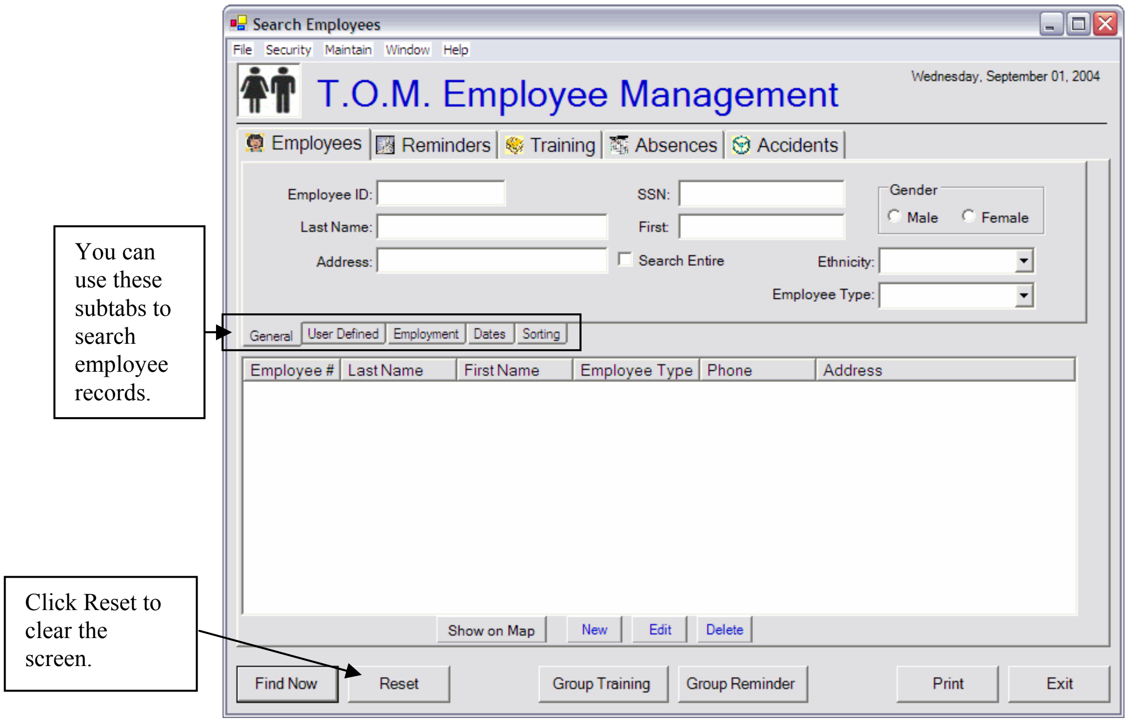


Figure 1-1. Using the subtabs on the Employees search screen

3. Enter the search criteria in the various subtabs you want to use in your search. The fields on each subtab are discussed in the next section.

4. Click the Find Now button to search for employee records.

ⓘ ***T.O.M Tip***

Do I have to complete every field on every subtab to search employee records?

No. You do not need to complete all the fields on any subtab to search employee records. In fact, if you want to view all employees in your database, 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.

I don't know what some of the fields are used for. Where can I find descriptions for the fields?

Each field on the subtabs is described next in this chapter.

General Subtab

Results of an employee record search using Smith as the search criteria.

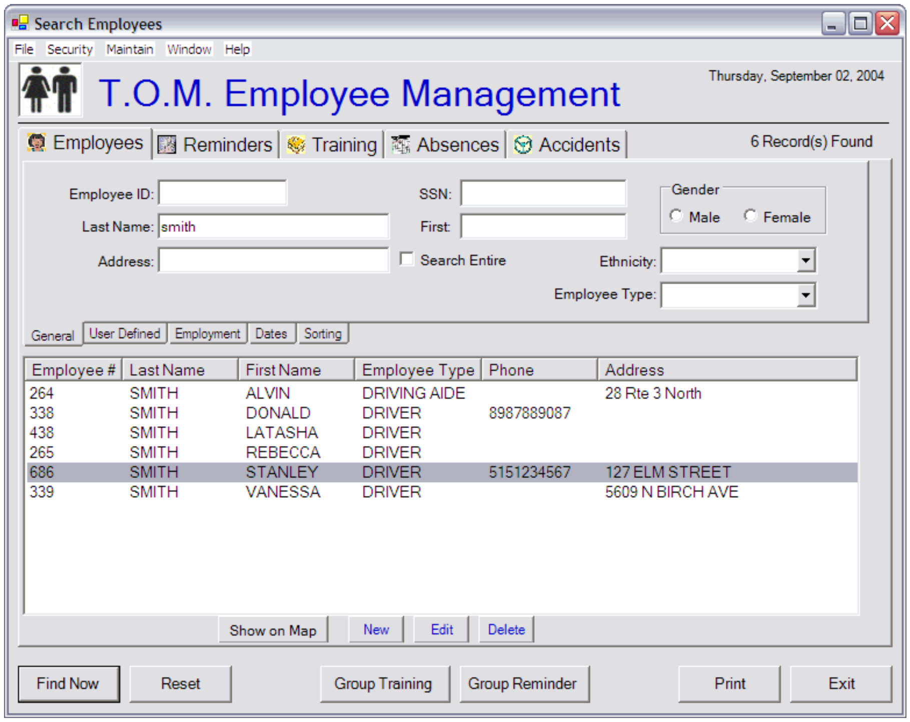


Figure 1-2. Using the General subtab to search employee records

You can use the following criteria (see Figure 1-2) to search employee records:

- **Employee ID.** Allows you to search by the employee's identification number.
- **SSN.** (Social Security Number) Allows you to search by the employee's social security number.
- **Gender.** Allows you to search using the employee's gender.
- **Last Name, First.** Allows you to search using the employee's first or last name. You can search using their complete name, or you can search using part of their name. For example, if you type *s* into the Last Name field, the Employee Management system retrieves all the employee records whose last name starts with *S*.
- **Address.** Allows you to search using an address. Like the name fields, you can type a partial address, but if you do, make sure you select Search Entire. If you type *pa* and click Find Now without selecting Search Entire, the Employee Management system probably will not return any records unless an employee lives on a street called *Pa*. However, if you type *pa*, select Search Entire, and then click Find Now, the Employee Management system returns, for example, employee records containing street names like Eagle Pass and Patterson Circle.
- **Search Entire.** Allows you to search for a partial address. When this option is not selected, the Employee Management system searches the address using only the characters you type in.
- **Ethnicity.** Allows you to search using the employee's ethnicity.
- **Employee Type.** Allows you search for a particular employee type such as Driver.

Employment Subtab

Results of an employee record search that retrieved employee records for all employees have Lisa Pershing as a supervisor.

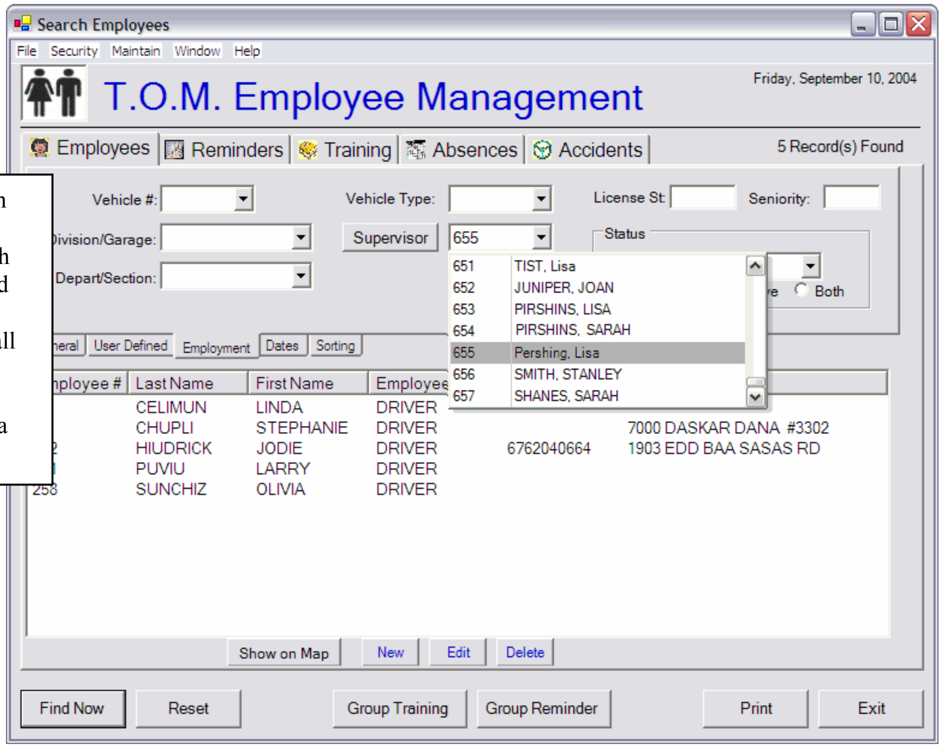


Figure 1-3. Using the Employment subtab to search employee records

You can use the following criteria to search employee records:

- **Vehicle #.** Allows you to search using a vehicle number assigned to the employee.
- **Vehicle Type.** Allows you to search using a type of vehicle assigned to the employee.
- **License St.** Allows you to search by the state that issued the employee's license.
- **Seniority.** Allows you to search by the seniority code.
- **Division/Garage.** Allows you to search by the division or garage the employee is assigned to.
- **Supervisor.** Allows you to search for employees who report to a particular supervisor.
  - » You can also select the supervisor's employee number from the pull-down menu.
  - » If you do not know the supervisor's employee number, you can click the Supervisor button. The Employee Management system displays a screen that allows you to search employee records so that you can retrieve the supervisor's employee number. After you type in your search criteria and click the Find Now button, the Employee Management system displays employee records matching your search criteria. When you select the supervisor's employee record and click the OK button, the Employee Management system closes the screen, returns to the Employment tab, and displays the supervisor's employee number in the Supervisor field.

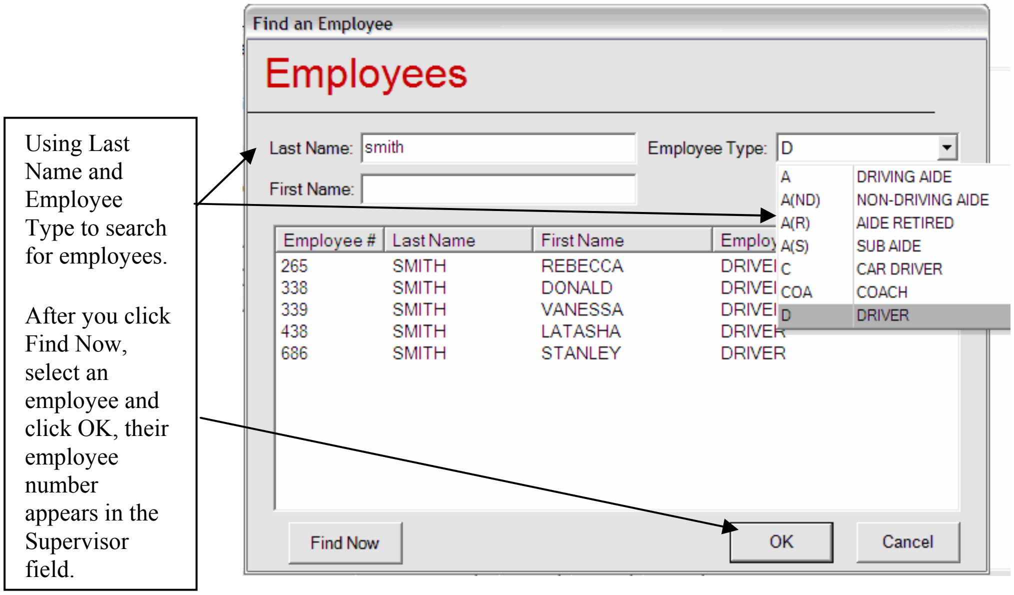


Figure 1-4. Searching for supervisors

- **Depart/Section.** Allows you to search using an employee's department or section.
- **Status. Active, Inactive, Both.** Allows you to search using the employee's employment status. Employees having a status of Active are employees currently working in your district. Employees having a status of Inactive have been marked as no longer working in your district. If you click Both, the Employee Management system searches all records.

ⓘ ***T.O.M Tip***

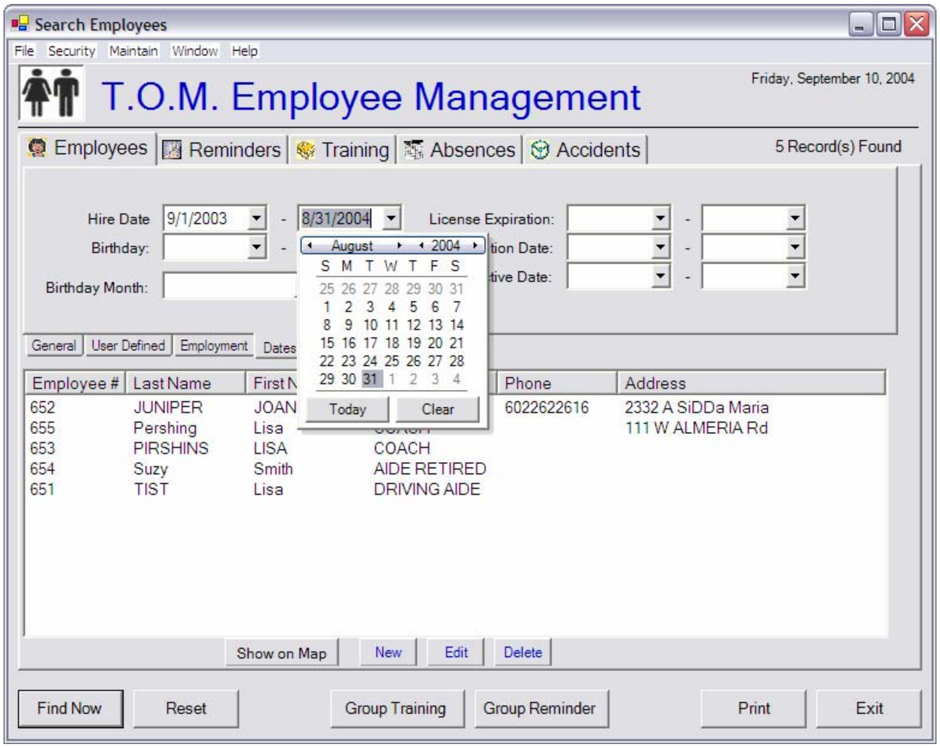
How do I search for all employees who have the same supervisor?

1. Click Reset to clear the screen.
2. Click the Employment subtab.
3. To complete the Supervisor field, select an employee from the pull-down menu.

NOTE: You can also click the Supervisor button. The Employee Management system displays a search screen. Then, type in or select your search criteria, and click the Find Now button. The Employee Management system displays employee records matching your search criteria. Select the supervisor's employee record, and click the OK button. The Employee Management system closes the screen, returns to the Employment tab, and displays the supervisor's employee number in the Supervisor field.

4. Click the Find Now button to search for all employees having the selected employee as their supervisor.

Dates Subtab



Results of a search for all employees using hire date as the search criteria.

Figure 1-5. Using the Dates subtab to search employee records

There are a couple of ways you can enter dates to the fields on the Dates subtab:

- You can access the calendar by clicking on the drop-down arrows on this tab. Then, you can use the arrows displayed around the month to change the month or the arrows around the year to change the year. When the calendar displays the correct month and year, select the day. After you click the day, the Employee Management system closes the calendar and displays the date.
- You can also type a date into any of these fields, but if you only type the month and year (such as 09/2004), the Employee Management system uses the first of the month as the default value.

NOTE: To search for records for a specific day, enter one date into the field, but to search for a range of dates for a given field, enter dates into both fields.

In addition to being able to using several methods for entering dates on this screen, you can also search for a specific date or for a range of dates.

- To search for records for a specific day, enter only one date into Beginning or Ending dates.
- To search for a range of dates for a given field, enter dates into both fields.

You can use the following criteria to search employee records:

- **Hire Date.** Allows you to search using the employee's hire date.
- **Birthday.** Allows you to search using the employee's birthdate.
- **Birthday Month.** Allows you to search using the employee's birthday month.

- **License Expiration.** Allows you to search using the date the employee's license is due to expire.
- **Certification Date.** Allows you to search using the date the employee was issued a certificate.
- **Inactive Date.** Allows you to search using the date an employee's status was changed to inactive.

User Subtab

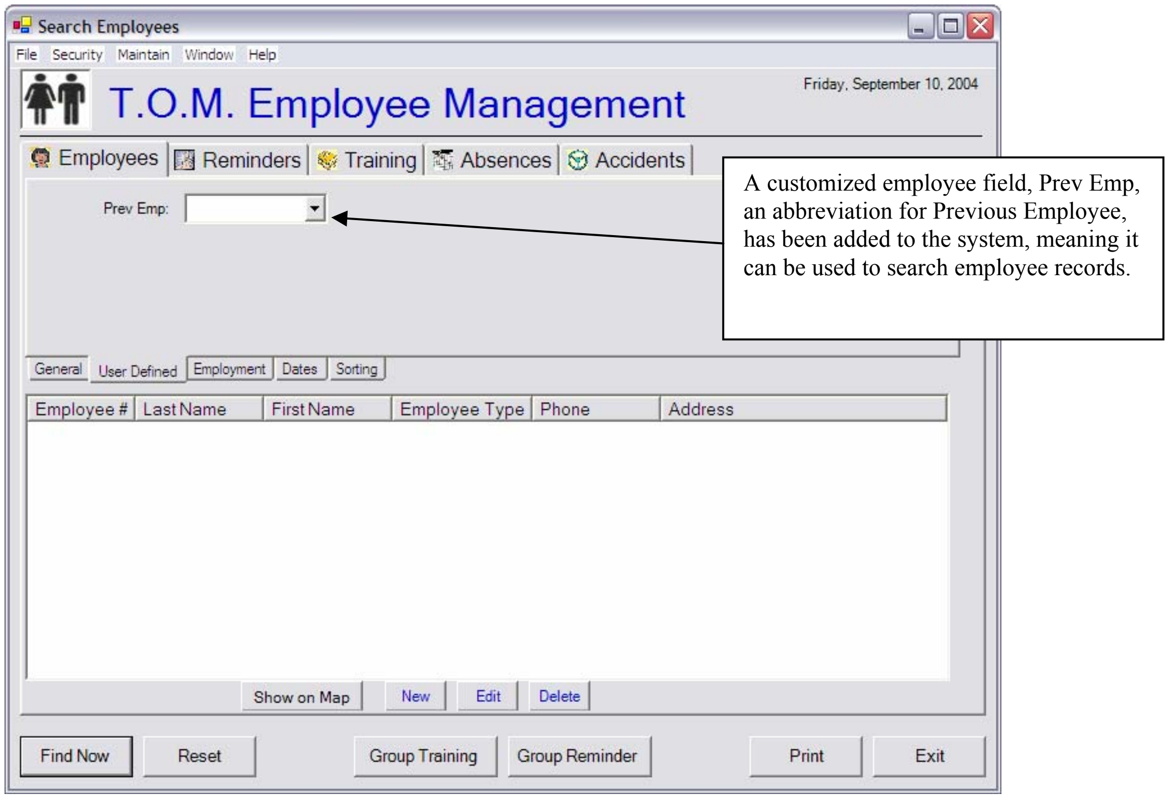
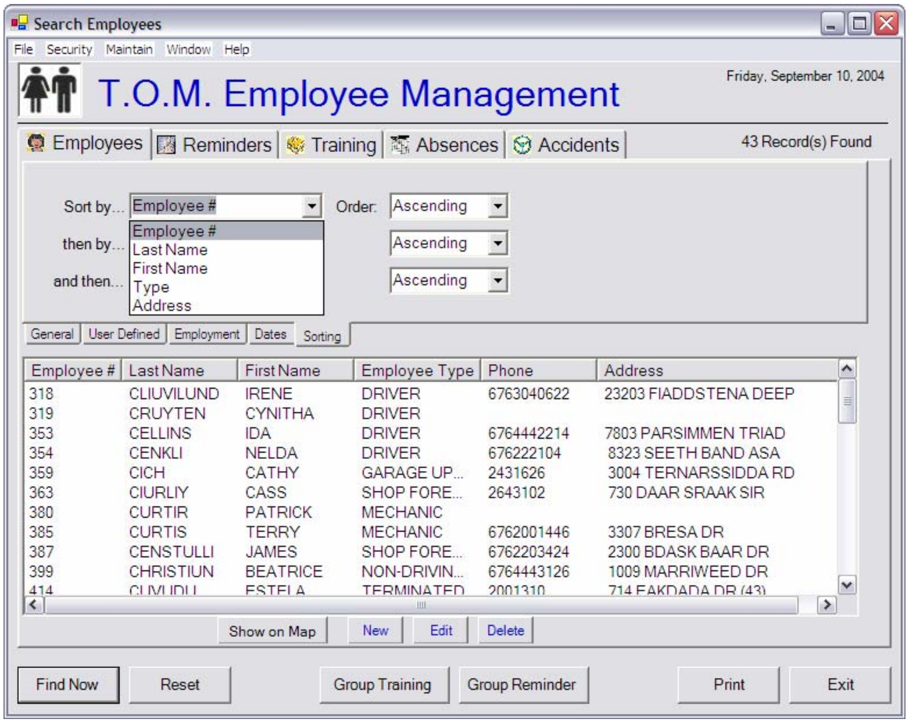


Figure1-6. Using the User Defined subtab to search employee records

The General, Employment, and Dates subtabs offer many ways for you to search for employee records with pre-programmed fields in the software. In addition to the options available on these subtabs, you can also create your own employee fields to customize the Employee Management system to your working environment. You can then use these fields to search for employees just as you select criteria on the other tabs.

NOTE: You will only be able to select criteria on this field if you added customized fields to the system. For general information about user defined fields, see the User Defined Tab section later in this chapter. To learn how to add these fields to the system, see the Adding Customized Employee Fields to the System section later in this chapter.

Sorting Subtab



You can select several fields as the sort criteria and Ascending and Descending as the sort order.

The graphic shows the results of sorting employees by their employee number.

Figure 1-7. Using the Sorting subtab to sort employee records

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

At what point can I sort employee records? Also, what if I pick the wrong sorting options or the results aren't what I expected?

ⓘ ***T.O.M Tip***

You can sort employee records at any point. When you sort employee records, you are sorting displayed records, even if you filtered the data.

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 filtered the records and click Reset and then Find Now, your records are no longer filtered, meaning that the records displayed are the same as those that displayed when you last started the system.

Combining Search Options from Several Subtabs

Although each subtab offers you many ways to search employee records, you can also select criteria on several tabs to create an even more powerful search. For example, you could search for all drivers who have Lisa Pershing as their supervisor. You can then sort the retrieved records by their employee identification numbers, for example.

To combine search options from several subtabs:

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

2. Click a subtab on the Employees screen. Figure 1-8 shows the General subtab.

Click Reset to clear the screen.

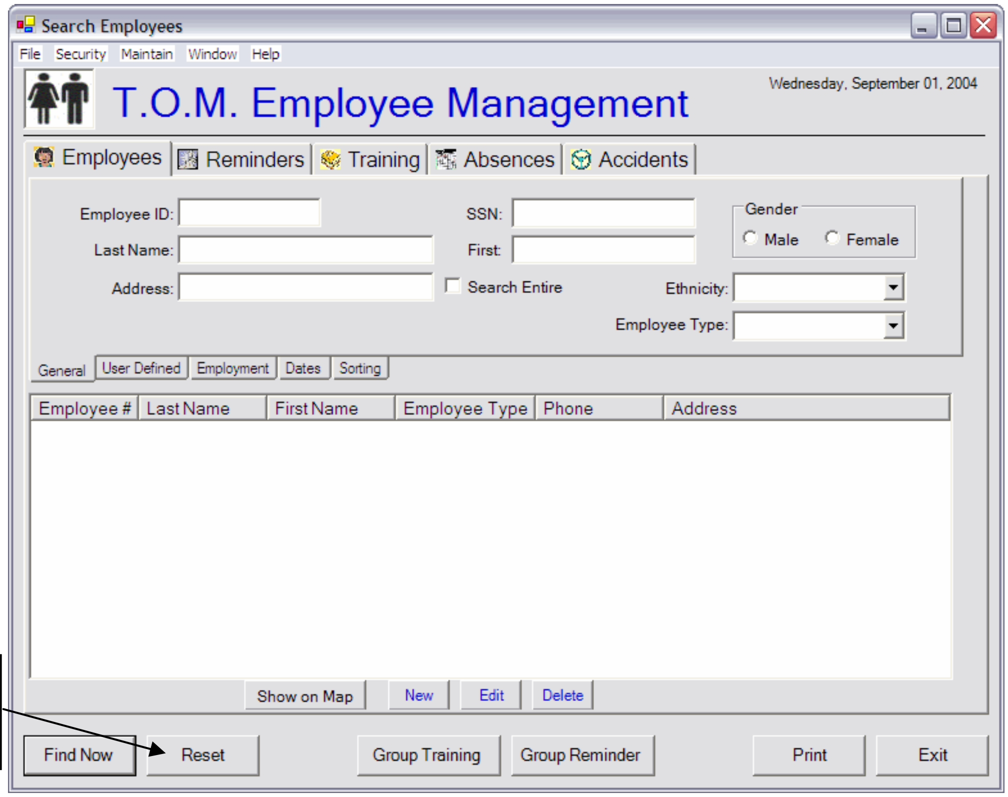


Figure 1-8. Using general criteria to search employee records

3. Select the criteria you want to use to search for employees. Figure 1-9 shows the Employee Type of Driver is being selected for the search criteria.

Click Find Now to search for records matching your selected criteria.

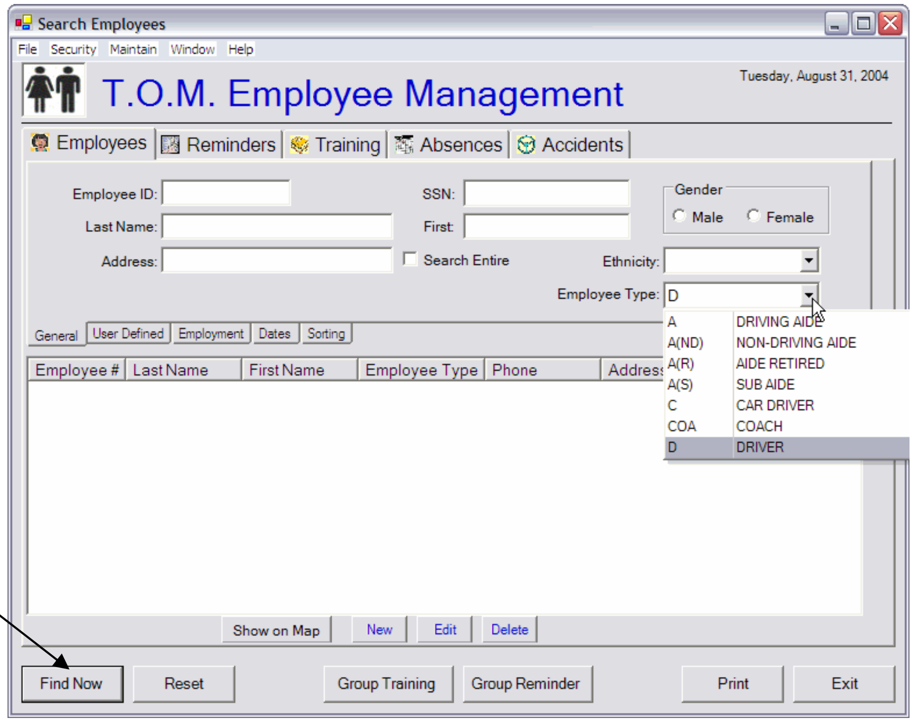


Figure 1-9. Selecting Driver as the Employee Type

4. Click another subtab.

5. Select the criteria you want to use to search for employees. Repeat this process until you have selected all the criteria you want to use in the search.

6. Click the Find Now button to search employee records using the selected criteria on the subtabs. The Employee Management system displays employee records matching your search criteria.

The graphics below show selecting criteria from the Employment and Sorting subtabs:

- Figure 1-10 shows selecting Lisa Pershing as the supervisor on the Employment subtab.

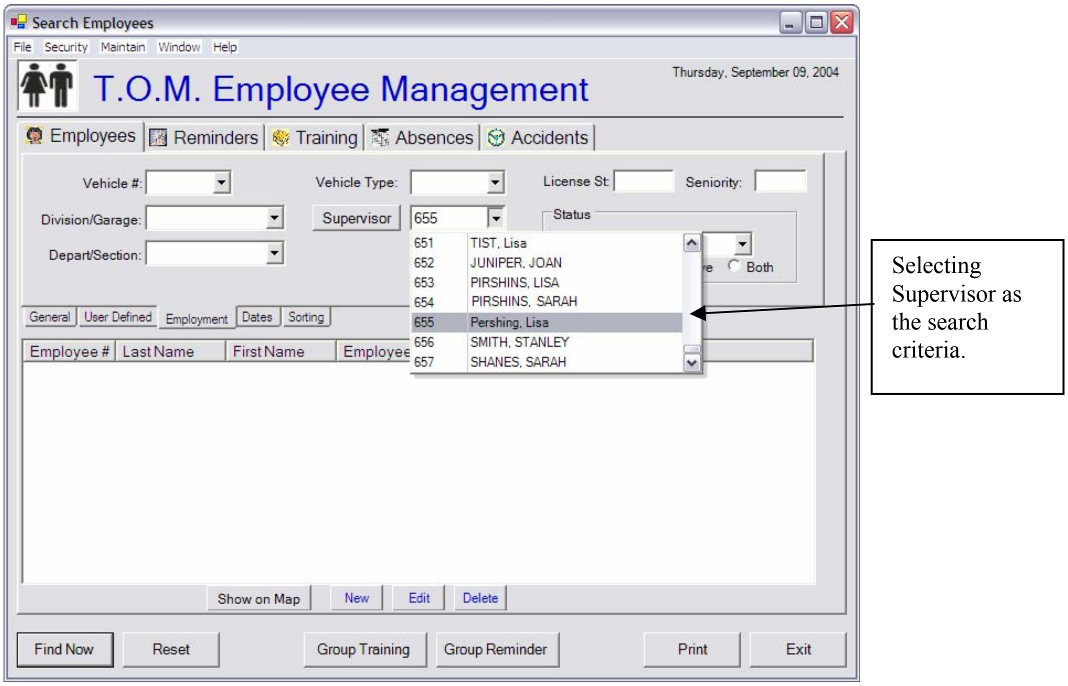


Figure 1-10. Combining the Employment subtab with the General subtab

- Figure 1-11 shows adding sorting criteria to the search.

Figure 1-11. Combining the Sort subtab with other subtab search options

- Figure 1-12 shows the retrieved records of employees who are drivers and have Lisa Pershing as their supervisor. The records are sorted in ascending order by their employee identification number.

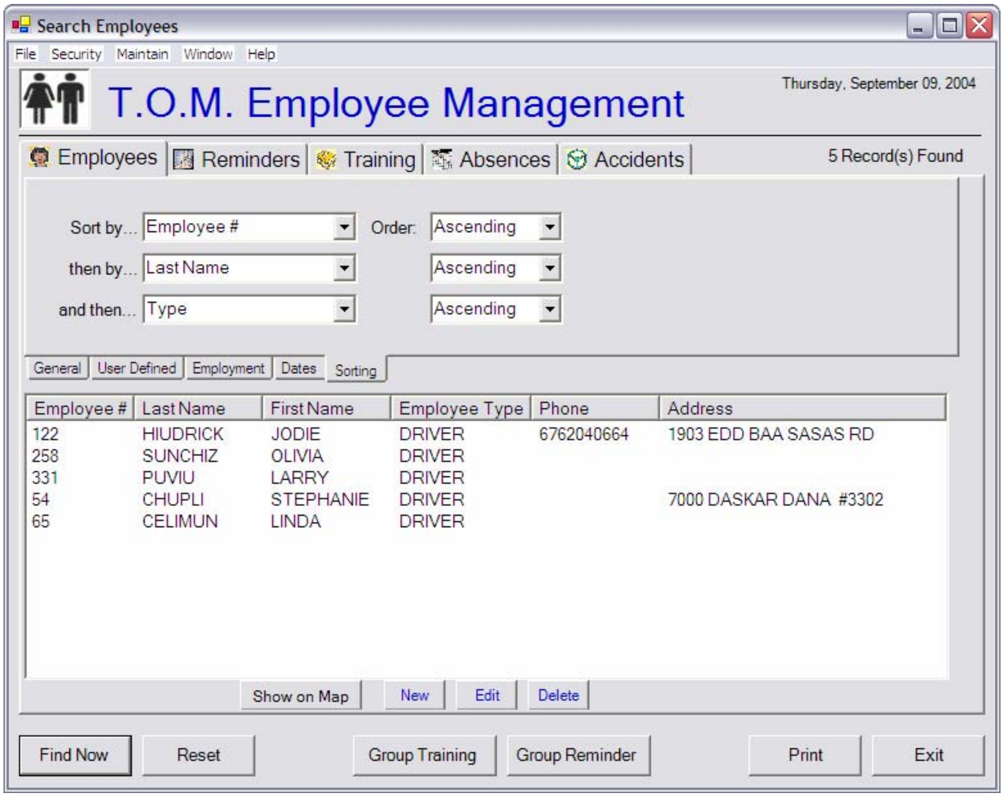


Figure 1-12. Results of a search using several subtabs

Understanding Employee Records

You can easily add and edit employee information using the Employee Management system. When you first look at the Employee screen, you will see that there are several tabs—General, Employment and License, Reminders, Notes, Accidents, Absences, Training, and User Defined:

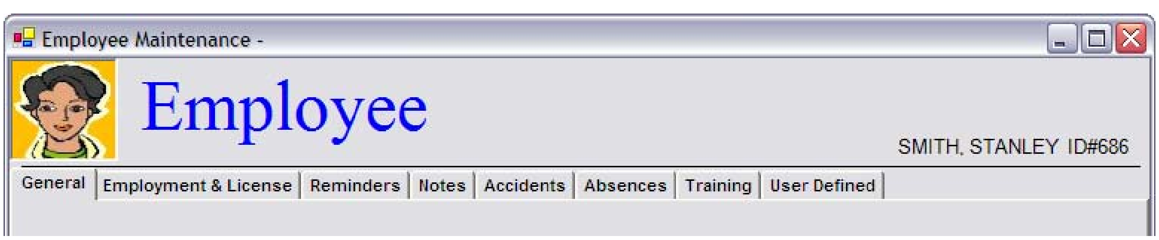


Figure 1-13. Employee screen tabs

Understanding “One to One” and “One to Many” Types of Information

These tabs help organize the various information for each of your employees. Some of the information is simply information about the employee like hire date or certification number. This type of information is considered “one to one” information, meaning, for example, that each employee only has one hire date. The information that is one to one can be found in the General, Employment and License and User Tabs.

Other information contains records like accidents or reminders regarding that employee. This second kind of information is considered “one to many” information. For example, each employee has potentially many absences. Information that is one to many can be found in the Reminders, Notes, Accidents, Absences and Training Tabs.

When you add an employee record for the first time, you first fill out the one to one type information and then continually add the one to many type of information.

What’s in This Chapter?

This chapter primarily discusses the one to one type information found in the General, Employment and License and User tabs:

- **General Tab.** This tab allows you to add and edit personal information such as the employee’s name, address, and phone numbers. *(The fields on this screen are discussed in the General Tab section.)*
- **Employment and License Tab.** This tab allows you to add and edit information that is specific to an employee’s position in your school district, his license information, and more phone numbers and addresses to his record. *(The fields on this screen are discussed in the Employment and License Tab section.)*
- **User Defined Tab.** Although the Employee Management system offers you many ways to add and track employee information, you might find that your district has special needs that are not included on any of the screens. If that happens, you can add customized fields to the system. You can then enter information into those fields. *(General information about adding a customized field is discussed in the User Defined Tab section. To learn how to add a customized employee field to the system, see the Adding Customized Employee Fields to the System section.)*

The following chapters in the *User's* section discuss the remaining one to many types of information found in the Reminders, Notes, Accidents, Absences and Training tabs.

Where Do I Start?

When adding an employee to the system, you will add information on the General, Employment and License, and User Defined tabs. You do not need to complete each field on these three tabs. However, you must complete the following fields:

- **General.** First Name, Last Name, and Hire Date
- **Employment and License.** Employee Type
- **User Defined.** None are required.

The fields listed above are only a few of the fields that are available to you. As mentioned above, you do not have to enter or select information for all the fields, but you do need to complete those fields you want to use when searching employee records. For example, to be able to search for employees having birthdays in September, you need to complete the DOB (Date of Birth) field on the General tab. If you do not complete this field, you will not be able to search employee records using that criteria.

The other tabs—Reminders, Notes, Accidents, Absences, and Training—allow you to add more records, or transactions, to an employee's record. You do not need to complete these tabs when you are adding an employee to the system. Rather, you will probably complete these fields as time passes; for example, you will not add absences to an employee's record until he is actually absent.

ⓘ ***T.O.M Tip***

Where can I find information about the other Employee tabs?

- The General, Employment and License, and User Defined tabs are discussed in this chapter.
- The Reminders tab is discussed in *Chapter 2* of the *Users* section.
- The Accidents tab is discussed in *Chapter 5* of the *Users* section.
- The Absences tab is discussed in *Chapter 3* of the *Users* section.
- The Training tab is discussed in *Chapter 4* of the *Users* section.

Adding and Editing Employee Records

1. Either:

- Click the New button on the Employees screen to add a new employee.

OR

- Search for the employee record you want to change, and select it by double-clicking on it or by selecting it and clicking the Edit button.

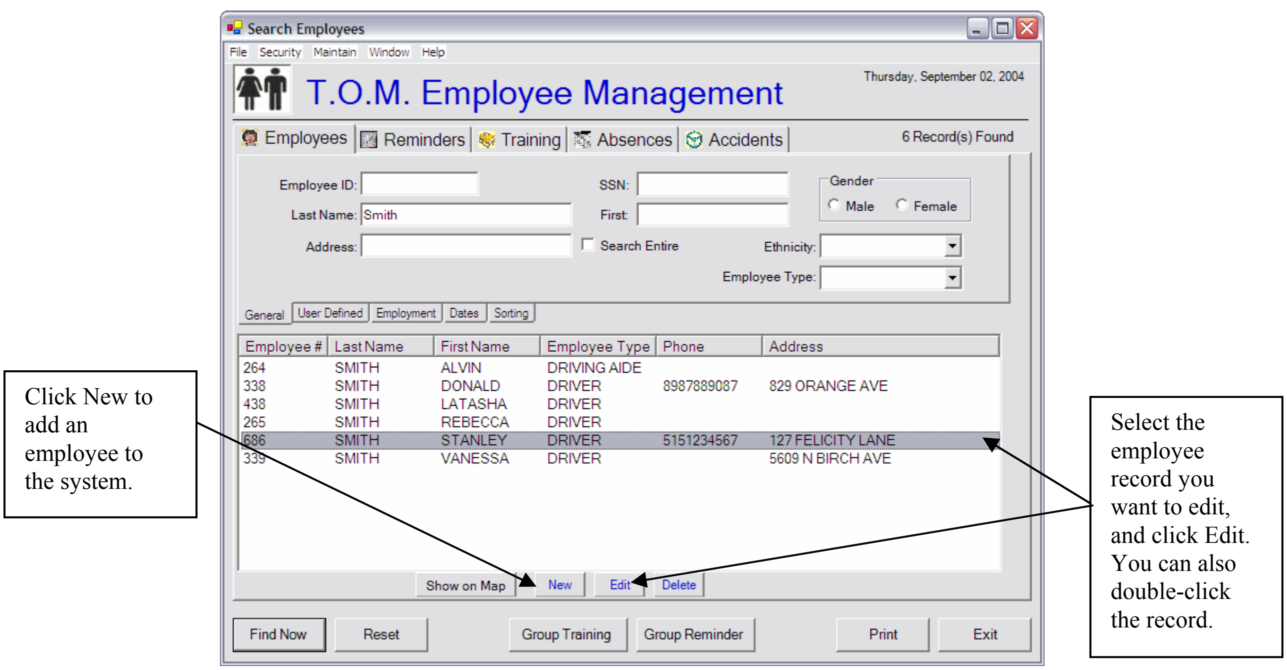


Figure 1-14. Adding or editing employee records

The Employment Management system displays the General tab of the Employees screen.

2. Type the information you want save in the employee record. For a detailed discussion about the fields on this screen, see the General Tab section.

3. Click the Employment and License tab. For a detailed discussion about the fields on this screen, see the Employment and License Tab section.

4. Type the information you want saved in the employee record, or select options from the pull-down menus.

NOTE: If you add the expiration date to the employee record, you will be prompted to add it as a reoccurring reminder. This is discussed in the next section of this chapter, but for detailed information about reminders, see Chapter 2 of the Users section. You can also add more addresses and phone numbers to the employee's record on this tab. This is discussed in the Adding Additional Phone Numbers and Addresses section of this chapter.

5. Click the User Defined tab if you added customized employee fields to the system. The Employee Management system displays the User Defined tab. *(For general information about customized employee field, see the User Defined Tab section of this chapter. To learn how to add customized employee fields to the system, see the Adding Customized Employee Fields to the System section later in this chapter)*

6. Type information into the fields.

ⓘ ***T.O.M Tip***

Can I type anything into customized employee fields?

When you type information into customized employee fields, the Employee Management system adds your entries to the pull-down menus on the User Defined tab of the main Employee screen. When you add information to a user defined field, it is not case sensitive. It is, however, space sensitive.

Suppose you added the custom field Prev Emp (Previous Employee) to the system. When you add employees to the system, you will be able to type information into this field. Because this field is space sensitive, the Employee Management system considers Klein ISD and KleinISD to be two separate entries.

When you search employee records, you can search for one value in a customized field. Therefore, if you used both methods (one with the space and one without) when you typed information into this field, you will not be able to retrieve all Klein ISD fields at one time; you will only be able to retrieve KleinISD or Klein ISD records. For this reason, you should decide how you want to enter data and continue to use that method for all your employee records.

7. Click the OK button to save your changes.

General Tab

Figure 1-15 shows adding general information to the system about an employee named Stanley Smith:

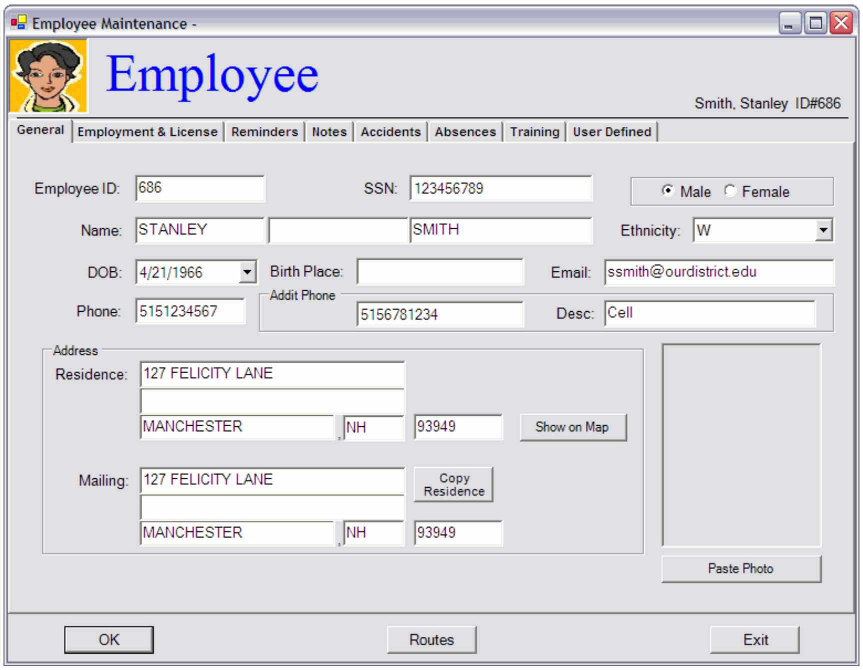


Figure 1-15. Adding general employee information to employee records

You can add the following general employee information to the system:

- **Employee ID.** Allows you to enter the employee's identification number. The Employee Management system generates an automatic identification number, but you change it at any time. If you decide to change the default employee identification number, you can enter up to 50 alphanumeric characters, meaning that you can type both letters and numbers into this field.

  Also, the Employee Management system uses the Employee ID as the value for the Check-IN PIN, which appears on the Employment and License tab.

NOTE: An employee's identification number must be unique. If you enter an identification number that has already been assigned to another employee, the Employee Management system displays a message stating that the number is already in use.

- **SSN.** (Social Security Number) Allows you to enter the employee's social security number.
- **Male/Female** Allows you to specify the employee's gender.
- **Name.** Allows you to the employee's first , middle, and last name. You can enter up to 15 characters for the first name and up to 30 for the middle and last names. *First and Last name are required fields.*
- **Ethnicity.** Allows you to select the employee's ethnicity.
- **DOB.** (Date of Birth) Allows you to enter the employee's date of birth.
  - » You can access the calendar by clicking on the pull-down menu. Then, you can use the arrows displayed around the month to change the month or the arrows around the year to change the year. When the calendar displays the correct month and year, select the day. After

you click the day, the Employee Management system closes the calendar and displays the date.

» You can also type a date into any of these fields, but if you only type the month and year, the Employee Management system uses the first of the month as the default value.

- **Birthplace.** Allows you to enter the employee's place of birth.
- **Email.** Allows you to enter the employee's email address.
- **Phone.** Allows you to enter the employee's main phone number.
- **Additional Phone.** Allows you add an additional phone number to the employee's record. You can also add a description (such as Cell) for the phone number. You can additional phone numbers on the Employment and License tab.
- **Address.** Allows you to enter the employee's residential and mailing address. You can enter two lines for the address; you can type in 30 characters for these lines. Additionally, you can type up to 15 characters for the city, 2 for the state, and 10 for the zip code.

  If the employee's mailing address is the same as the residential address, click the Copy Residence button; the Employee Management system copies the address information to the Mailing address fields. Additionally, you can additional phone numbers on the Employment and License tab.
- **Show on Map.** *(Functional if you have installed Microsoft MapPoint)* Generates and displays a map showing the employee's residential address. See Viewing Employee Addresses on a Map using Microsoft MapPoint for more information on using this feature.
- **Paste Photo.** Allows you to add the employee's photo to his employee record.

Employment and License Tab

The Employment and License tab allows you to add information such as the employee's license information, details about his employment in your district (such as the division or garage he is affiliated with), and his employee status. You can also add any number of additional addressed and phone numbers to his employee record on this tab.

Figure 1-16 shows adding employment and license information for Stanley Smith:

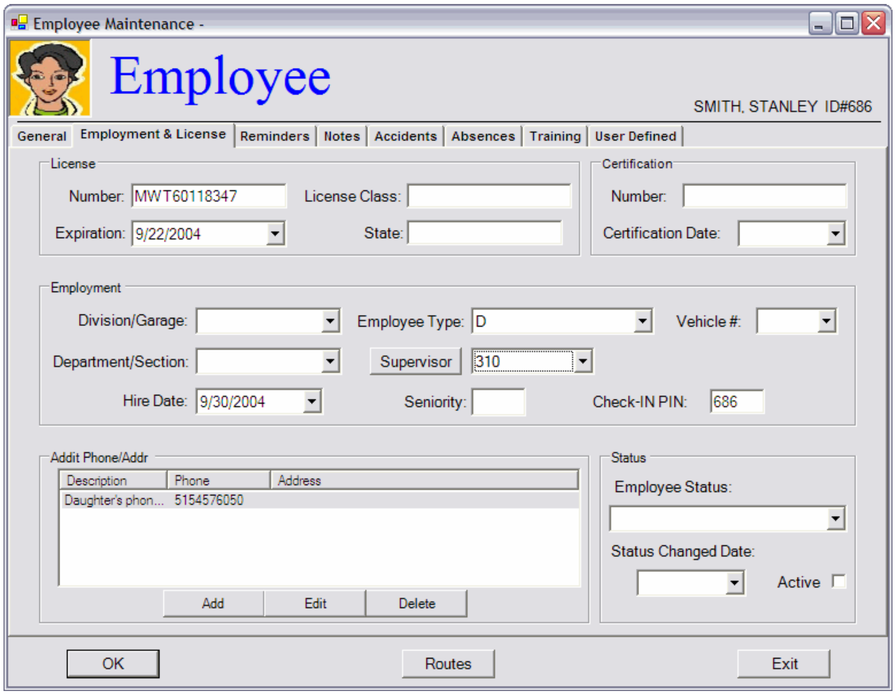


Figure 1-16. Adding employment and license information to employee records

NOTE: Several of the fields on this tab allow you to add dates to the employee's record. Remember the following about adding dates:

- ***You can access the calendar by clicking on the pull-down arrow. Then, you can use the arrows displayed around the month to change the month or the arrows around the year to change the year. When the calendar displays the correct month and year, select the day. After you click the day, the Employee Management system closes the calendar and displays the date.***
- ***You can also type a date into any of these fields, but if you only type the month and year, the Employee Management system uses the first of the month as the default value.***

What if I need to add more options to the various pull-down menus?

You can add employee types, employee statuses, ethnicity codes, vehicle types, division/garages, and departments/sections by selecting File>Other.

ⓘ ***T.O.M Tip***

You can add the following employment and license information to the system:

- **License**
  - » **Number.** Allows you to enter the employee's license number. You can enter up to 25 characters into this field.
  - » **License Class.** Allows you to enter the employee's license class. You can add up to 30 characters in this field.
  - » **Expiration.** Allows you to enter the expiration date for the employee's license. If you enter an expiration date, you can set up a reoccurring reminder for this employee. A reoccurring reminder alerts you when a task (such as license renewal) is due within a given period of

time. *(See the procedure described in the Adding a Reoccurring Reminder for License Expirations section for information on how to use this feature.)*
If you set up an reoccurring reminder, the Employee Management System schedules the reminder, and it manages the reminder for you. If you do not set up a reminder as a reoccurring reminder, you will need to set it up using one of the methods described in *Chapter 2* of the *Users* section.

» **State.** Allows you to enter the abbreviation for the state where the employee's license was issued. You can enter up to two characters in this field.

- **Certification**

» **Number .** Allows you to enter the employee's certification number. You can enter up to 50 characters into this field.

» **Certification Date.** Allows you to enter the date the employee's certification was issued.

- **Employment**

» **Division/Garage.** Allows you to enter the division or garage the employee is affiliated with.

» **Employee Type.** Allows you to select the employee's classification (such as driver). *Employee Type is a required field.*

» **Vehicle #.** Allows you to select the vehicle number associated with the employee.

» **Department/Section.** Allows you to select the department or section the employee is affiliated with.

» **Supervisor.** Allows you to select the employee's supervisor. If you know the supervisor's employee number, you can type it into this field or select it from the pull-down menu. If you do not know the supervisor's employee number, you can click the Supervisor button. The Employee Management system displays a screen that allows you to search employee records so that you can retrieve the supervisor's employee number. After you type in your search criteria and click the Find Now button, the Employee Management system displays employee records matching your search criteria. When you select the supervisor's employee record and click the OK button, the Employee Management system closes the screen, returns to the Employment tab, and displays the supervisor's employee number in the Supervisor field.

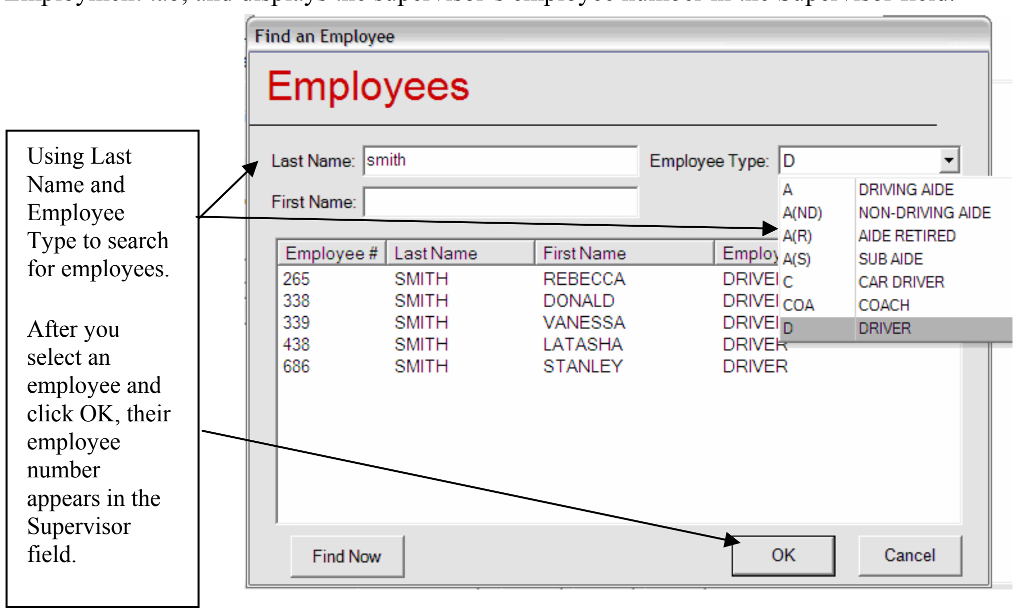


Figure 1-17. Searching for supervisors

» **Hire Date.** Allows you to select the date the employee was hired. *Hire Date is a required field.*

  - » **Seniority.** Allows you to enter the employee's seniority code. You can type up to 12 numbers into this field; you cannot type letters into this field. If you use the Field Trip Management software, you can use this code to break a tie between two or more employees that were hired on the same day.
  - » **Check-IN PIN.** By default, displays the employee identification number.
- **Additional Phone/Address.** Allows you to set up additional addresses and phone numbers for the employee. When you click the Add button, the Employee Management system displays a screen where you can enter the phone number and address information. *(See the Adding Additional Phone Numbers and Addresses section for information on how to use this feature.)*
- **Status.**
  - » **Employment Status.** Allows you to select the employee's status.
  - » **Status Change Date.** Allows you to select the date that the employee's status changed.
  - » **Active.** When selected, indicates that the employee currently works for the district.

ⓘ *T.O.M Tip*

What's the difference between deleting an employee and marking them inactive?

When you delete employees, their information is removed; you will not be able to view any of their information. If you mark the employee as inactive, their information remains in the system. You can exclude inactive employees from searches by selecting Active on the Employment tab.

Adding a Reoccurring Reminder for License Expirations

A reoccurring reminder alerts you when a task (such as license renewal) is regularly due within a given period of time. If you set up an reoccurring reminder, the Employee Management System schedules the reminder, and it manages the reminder for you on the Reminders tab of the Employee screen.

The system will notify you when the task's due date is approaching, and you can also view employee reminders by looking on the Reminders tab in the Employee screen or by searching for reminders within a given date range on the Reminders tab of the main Employment Management system screen.

NOTE: If you do not set up a reminder as a reoccurring reminder, you can also set it up using one of the methods described in Chapter 2 of the Users section.

1. To display the Employment and License tab:

   - Access the employee's record by searching for it, selecting it, and clicking Edit. Then, click the Employment and License tab.

   OR

   - Click the Employment and License tab while you are adding a new employee to the system.

2. To enter the expiration date:

   - Click the pull-down menu to select a date on the calendar. You can use the scroll arrows displayed around the month and year to change them. When you click a day, the Employee Management system closes the calendar and displays the selected date in the field.

   OR

   - Type the month, day, and year into the field. If you only type the month and year, the Employee Management system uses the first of the month as the default value.

3. Complete the screen by entering data into the fields or by selecting information from the pull-down menus.

4. Click OK. The Employee Management System automatically displays the Employee Reminders screen to see if you want to set up a reoccurring reminder for the license expiration date.

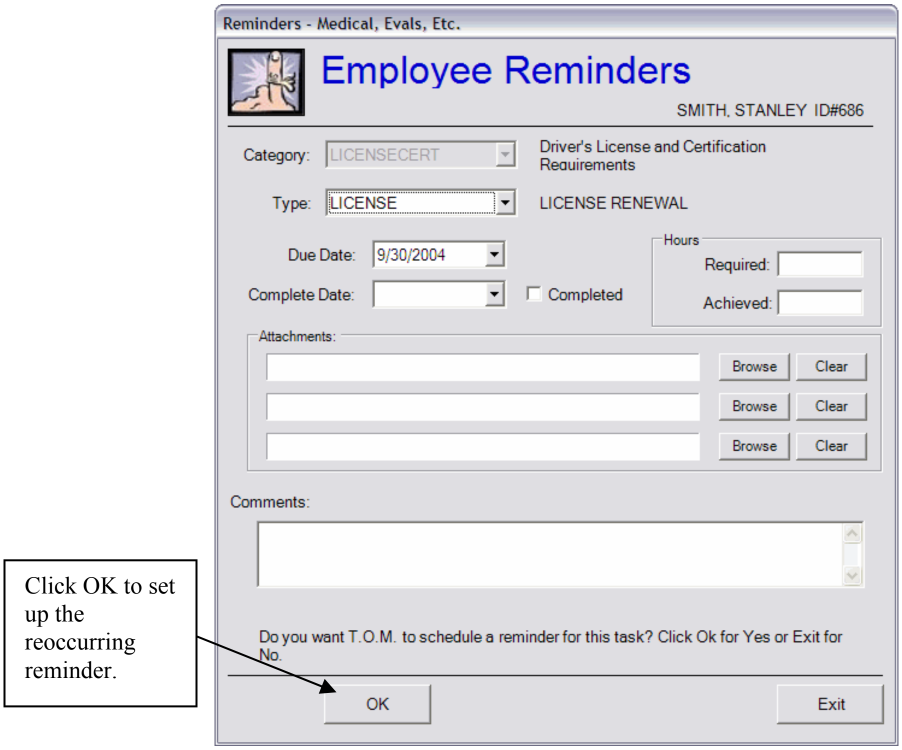


Figure 1-18. Setting up reoccurring reminders

5. Click the OK button if you want to schedule the license renewal as a reoccurring reminder. The Employee Management system closes the screen and adds the reoccurring reminder to the system.

NOTE: If you click Exit, you need to set up the reminder for the employee. Reminders are discussed in detail in Chapter 2 of the Users section.

Adding Additional Phone Numbers and Addresses

You can add any number of phone numbers and addresses to the system.

1. To display the Employment and License tab:

   - Access the employee's record by searching for it, selecting it, and clicking Edit. Then, click the Employment and License tab.

   OR

   - Click the Employment and License tab while you are adding a new employee to the system.

2. Click the Add button. The Employment Management system displays the Addit Phone Numbers/Address screen.

3. Type the contact information into the fields; you can also add comments if you want to store additional notes. A sample completed screen looks similar to:

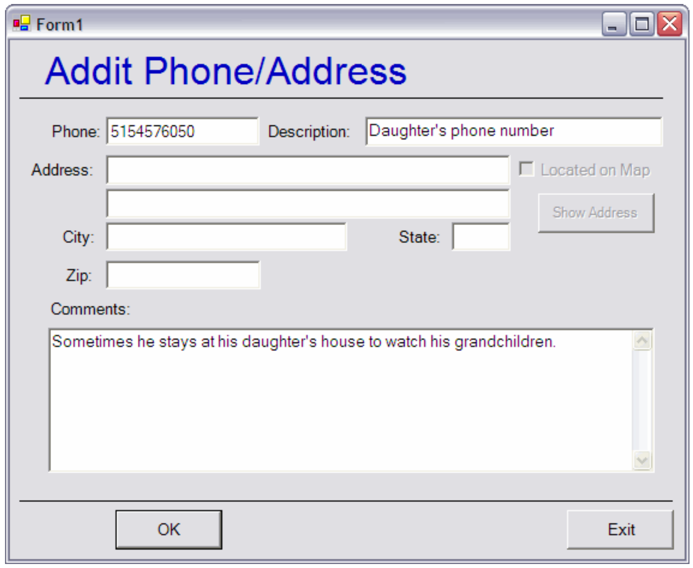


Figure 1-19. Adding additional phone numbers and addresses

4. Click the OK button. The Employee Management system adds the information to the system.

ⓘ ***T.O.M Tip***

How can I change or remove an additional address or phone number?

1. Search for the employee's record on the Employee screen.
2. Double-click the employee's record, or select it and click the Edit button.
3. Click the Employment and License tab.
4. To edit the additional phone numbers and addresses , click Edit and make your changes. Click OK to save your changes.
5. To delete the additional phone numbers and addresses, click Delete and then OK.

User Defined Tab

Before you can add information to fields on this tab, you must first add the fields to the system. When you add information to a user defined field, it is not case sensitive. It is, however, space sensitive.

Suppose you added the custom field *Prev Emp* (Previous Employee) to the system. When you add employees to the system, you will be able to type information into this field. Because this field is space sensitive, the Employee Management system considers *Klein ISD* and *KleinISD* to be two separate entries.

When you search employee records, you can search for one value in a customized field. Therefore, if you used both methods (one with the space and one without) when you typed information into this field, you will not be able to retrieve all Klein ISD fields at one time; you will only be able to retrieve KleinISD or

Klein ISD records. For this reason, you should decide how you want to enter data and continue to use that method for all your employee records.

ⓘ ***T.O.M Tip***	**I added custom fields, but I don't see them.** After you add custom fields, be sure you click OK (and not Exit) on the Employee Management Options screen. Then click OK to close the District Options screen. You need to close the Employee Management system and restart it so that your fields are added to the User tab. Click the User tab to view the added fields.

Adding Customized Employee Fields to the System

You can add 10 general fields and 5 date fields to the system, and their names, or captions, can be up to 10 characters in length. *(For a general discussion of customized employee fields, see the User Defined Tab section later in this chapter.)*

1. Select File>Other>District Options (Figure 1-20). The Employee Management system displays the District Options screen.

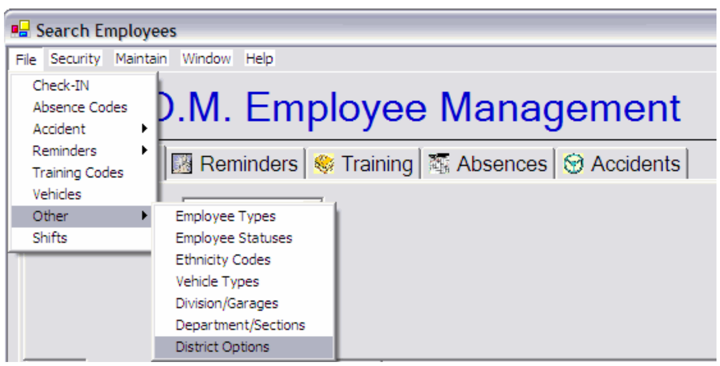


Figure 1-20. Selecting File>Other>District Options

2. Click the Employment Management button (Figure 1-21). The Employee Management system displays the Employee Management Options screen.

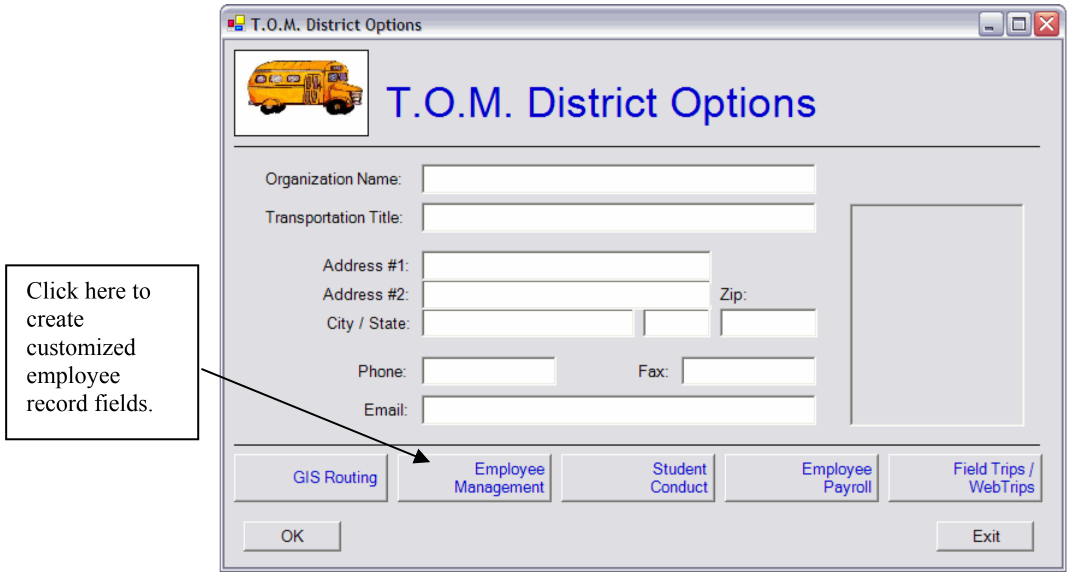


Figure 1-21. District Options screen

3. Type the name of the field into the caption box.

- To add a general field, type the name into the User Caption box.
- To add a date field, type the name into the User Date 1 caption.

Figure 1-22 shows that a general field with a name, or caption, of Prev Emp (an abbreviation for Previous Employer) is being added to the system.

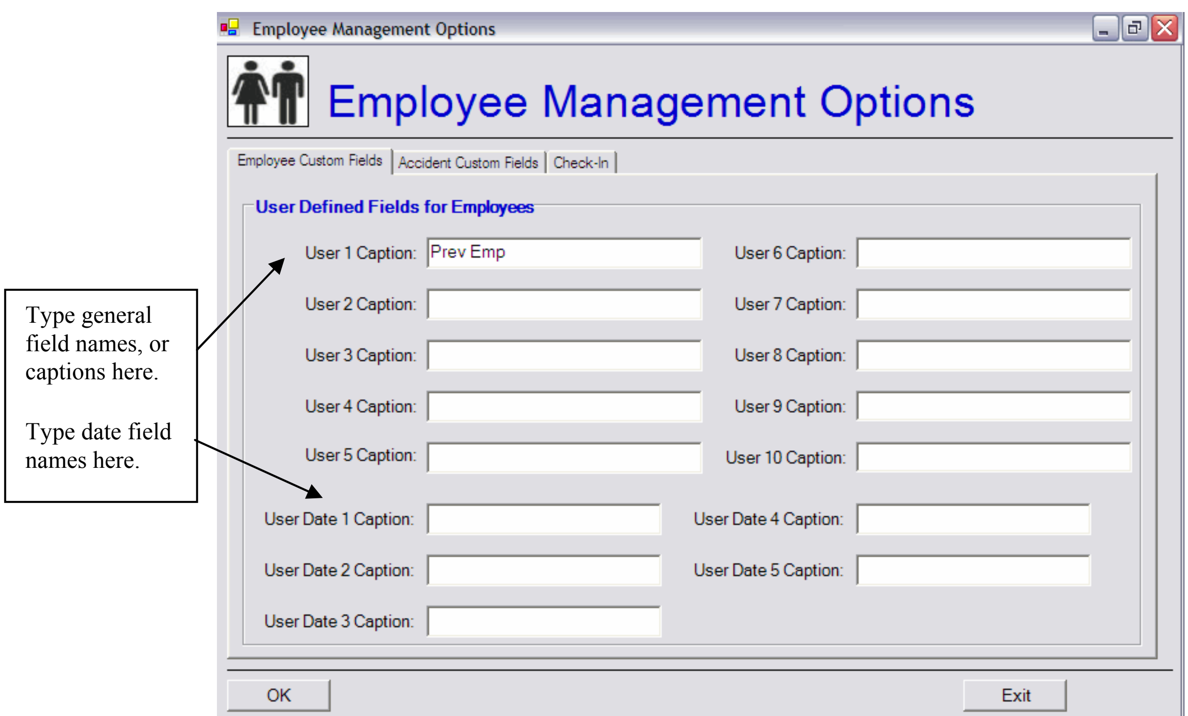


Figure 1-22. Adding customized employee fields to the system

4. Click the OK button to add your customized fields to the Employee Management system and close the screen. The Employee Management system displays the District Options screen.

5. Click the OK button to close the District Options screen.

6. Click Exit to close the Employee Management system.

7. Restart the Employee Management system.

8. Click the Employees tab.

9. Click the Users tab. The Employee Management system displays the customized fields you added to the system (Figure 1-23).

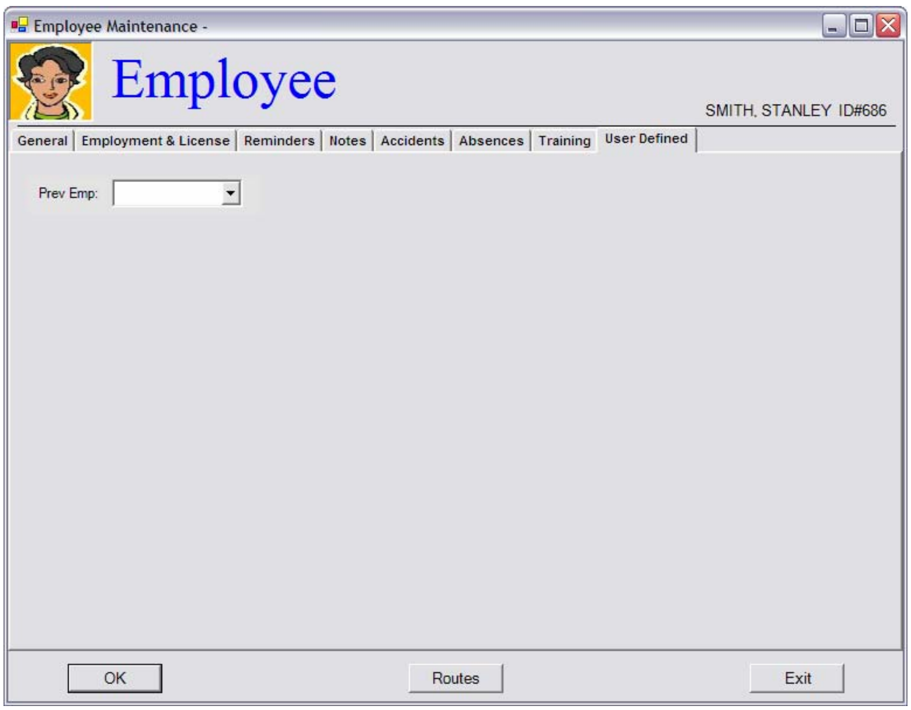
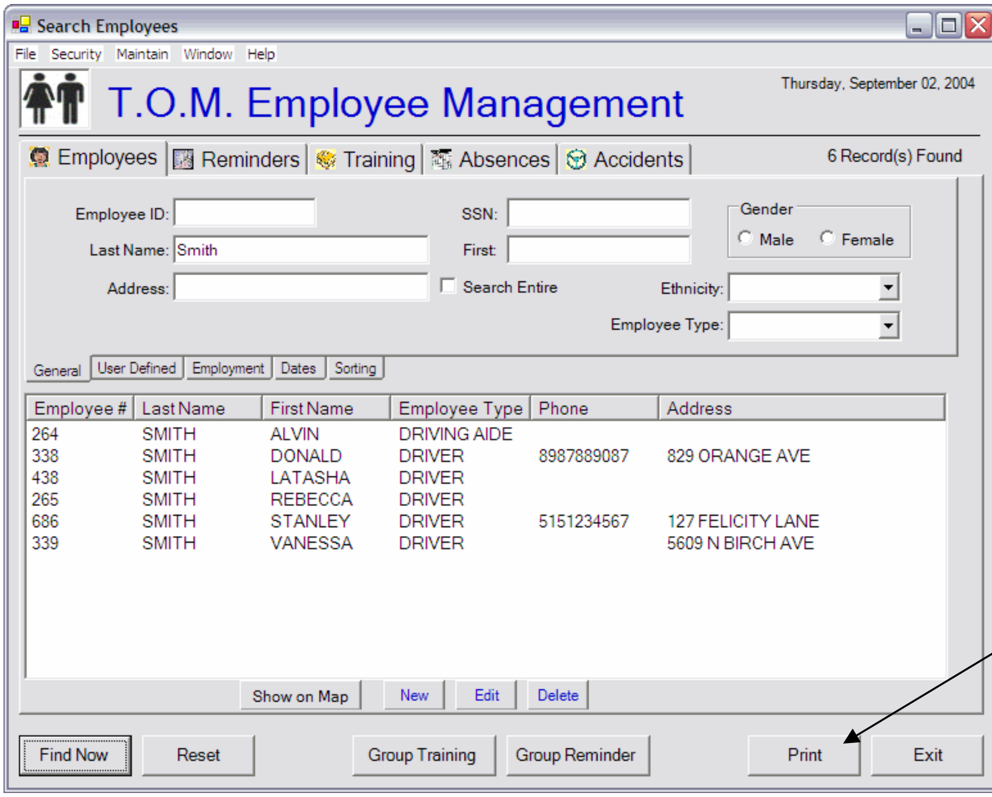


Figure 1-23. Viewing customized employee fields

Generating and Printing Employee 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 employee report you want to generate and to type in its title.



Click the Print button to generate and print an employee report.

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

Viewing Employee Addresses on a Map using Microsoft MapPoint

Viewing your employees on a map can be a very useful feature especially if your employees park your district's buses at their house. To use this feature, you are required to have Microsoft MapPoint 2002 (or newer) installed on the workstation you use to operate the Employee Management system. The Employee Management system contains links to MapPoint that allow you to click once to use the mapping feature that gives you the ability to generate a map for a single employee or a group of employees.

I generated a map for the addresses of a group of employees, but I don't understand how to manipulate it.

ⓘ ***T.O.M Tip***

Refer to your documentation for Microsoft MapPoint for information about how to use this product.

Creating and Viewing a Map of a Single Employee's Address

1. Search for the employee whose address you want to view on a map.

2. Either:

   - Select the employee record, and click Edit.

   OR

   - Double-click the employee record.

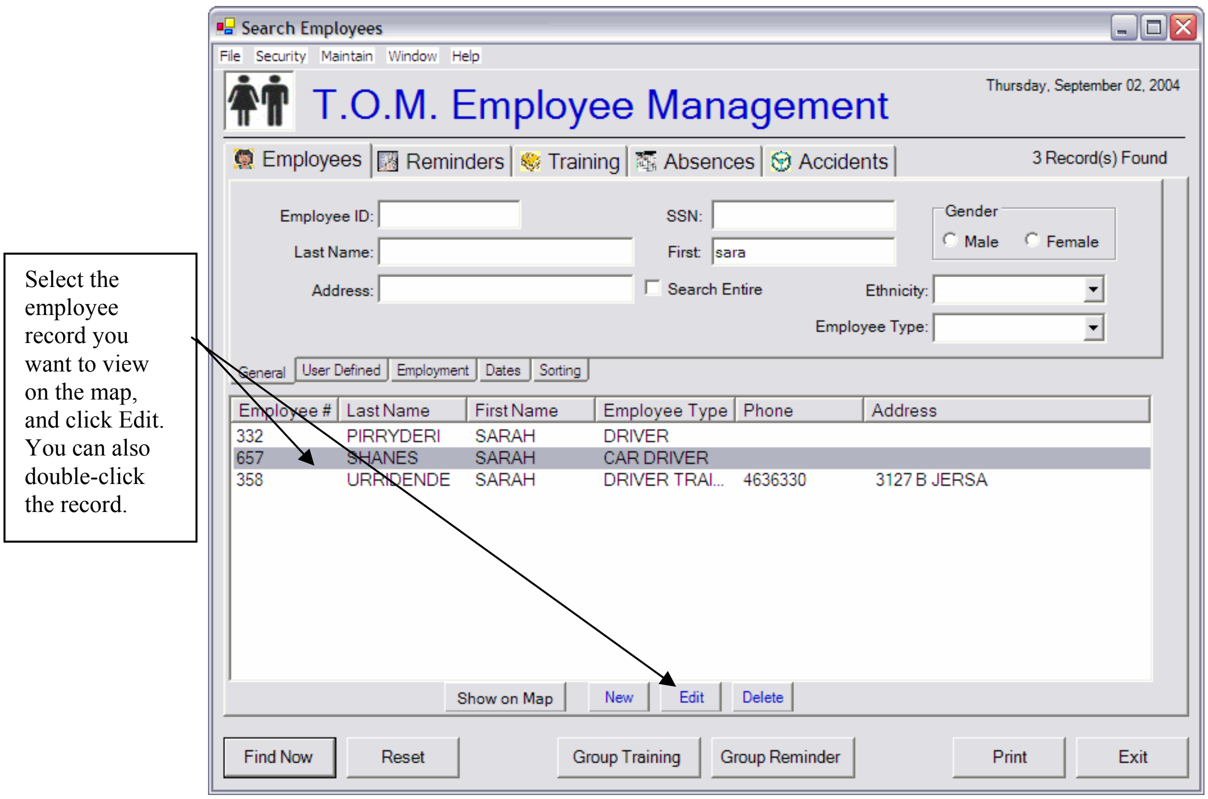


Figure 1-24. Searching for an employee record

The Employee Management system displays the Employee screen.

3. Click the Show on Map button (Figure 1-25).

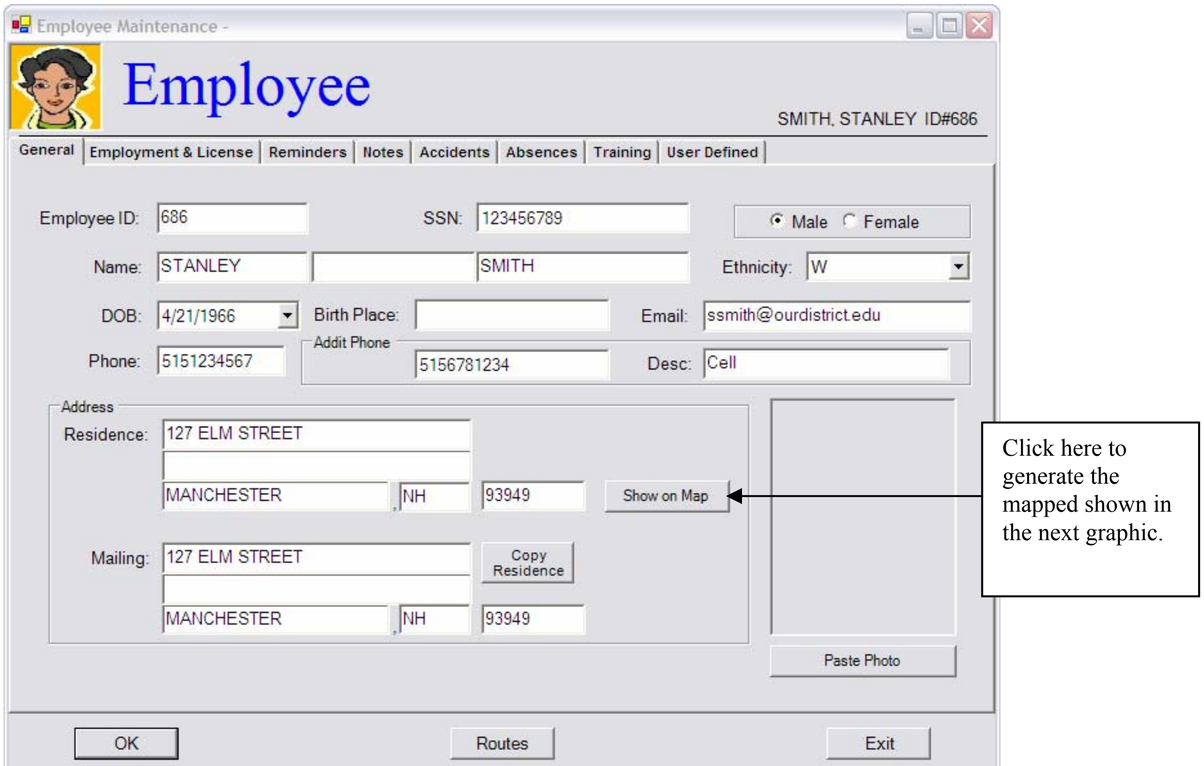


Figure 1-25. Generating a map showing an employee's address

Microsoft MapPoint launches and displays the map (Figure 1-26).

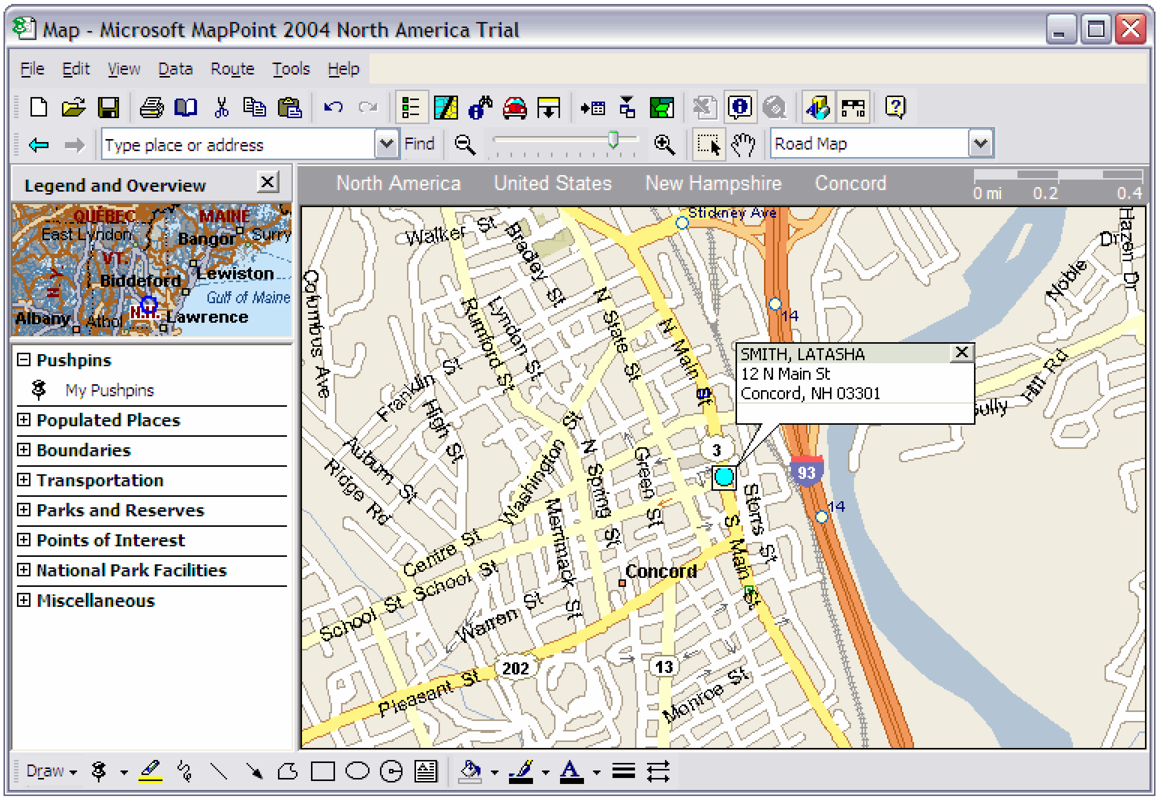


Figure 1-26. Sample map of an employee address

Creating and Viewing a Map of a Group of Employee Addresses

You can also create and view a map for a group of employee addresses. This feature is made even more powerful because it is married to the robust employee searching capabilities of the Employee Management software. When you display the employee search results, you have at your fingertips virtually unlimited employee mapping capabilities.

To view a map of a group of employees address:

The Employee Management system

1. Search for the group of employees whose addresses you want to view on a map. Figure 1-27 shows searching for all drivers whose address contains the word *almeria*. Notice that *Search entire* has been selected so that all addresses containing the word *almeria* are returned from the database.

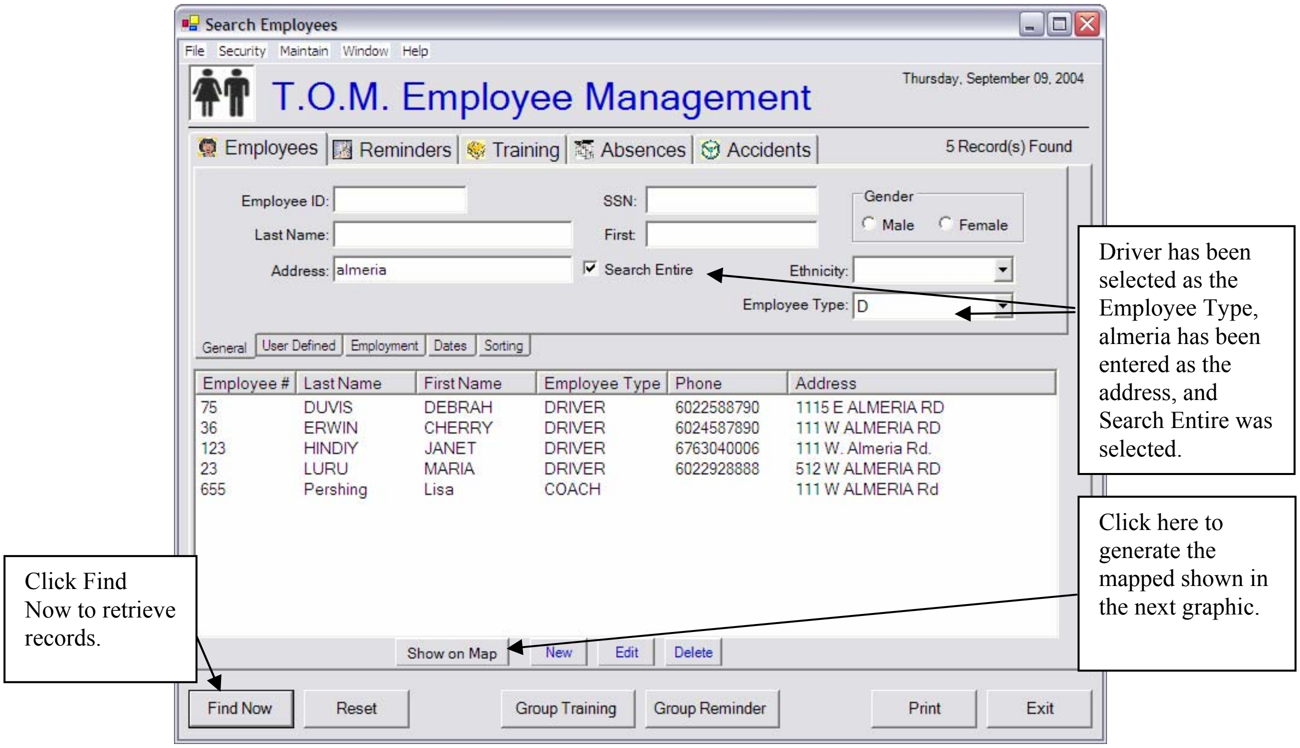


Figure 1-27. Retrieving a group of records

2. Click Show on Map. Microsoft MapPoint launches and displays the map (Figure 1-28).

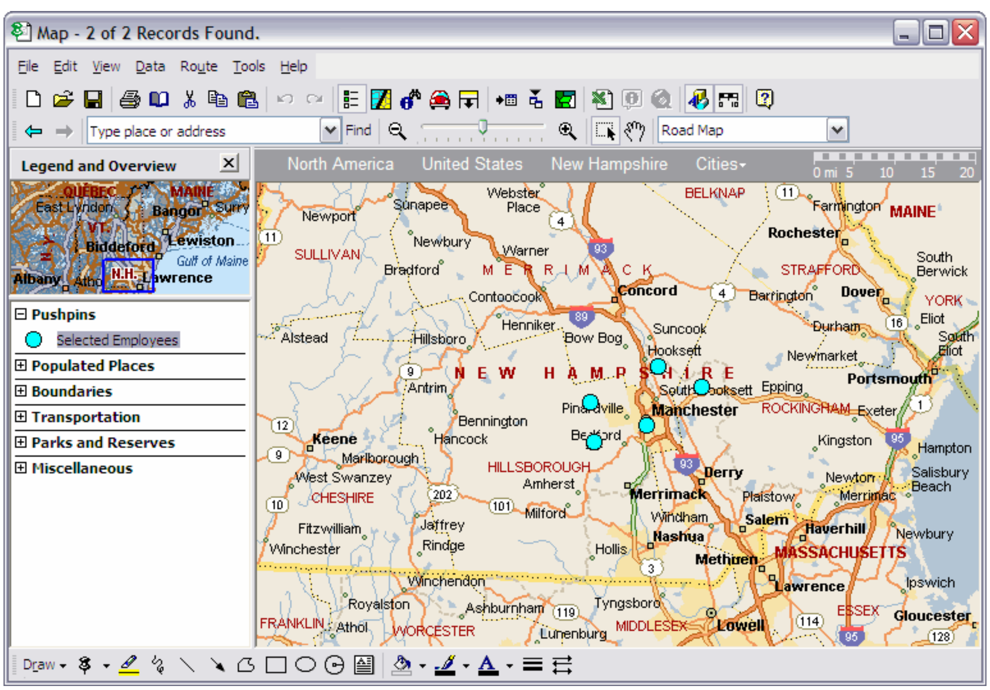


Figure 1-28. Sample map of group of employees addresses

Deleting Employee Records

When you delete employees from the system, all their information is removed, meaning that you will not be able to view any of their information. You cannot retrieve deleted records.

NOTE: If you want to keep the employee in the system, you can mark his record as Inactive on the Employment and License tab. That way, his information stays in the system, but you can exclude inactive employees from searches by selecting Active on the Employment tab of the main screen of the Employee Management system.

To delete an employee from the system:

1. Search for the employee you want to delete.

2. Select the employee record you want to delete.

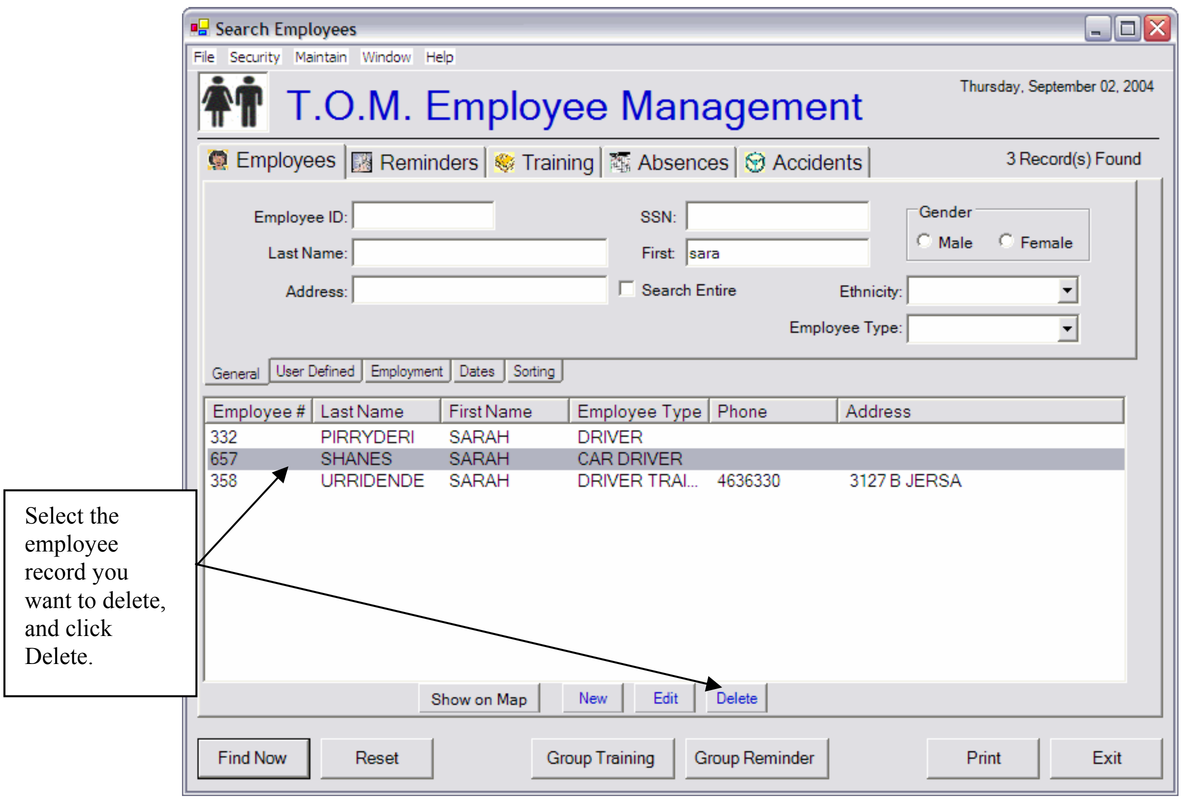


Figure 1-29. Deleting an employee from the system

3. Click the Delete button. The Employment Management systems asks if you want to delete the employee.

4. Click OK to delete the employee from the system.