Chapter 4

Working with Employee Training

Tracking employee training is a vital part of employee management. For many school organizations, tracking employee training especially driver, mechanics, and bus aide training is required by law. For other organizations, it is not required by law but still an important part of assuring that key employees are qualified to perform sensitive tasks. The T.O.M. Employee Management software has a robust training feature that will greatly assist you to track employee training requirements and achievements.

As discussed in Chapter 2, you can set up reminders for employees, and some of those reminders can be for training. The Employee Management system tracks the number of hours employees must complete as well as the number of hours completed.

The T.O.M. Employee Management software allows you to track your employee training both individually as well as in class groups. When you add training hours to the system for an individual employee or a group of employees, you can apply completed hours to the training reminder. For example, suppose an employee must complete 20 in-service hours and that he just completed five of those hours.

When you add the individual or group training record to the system, you can specify that those five hours be applied to the reminder. The Employee Management system deducts the completed hours, so the reminder now shows that the employee now has 15 hours to complete.



Where can I learn more about reminders?

Refer to Chapter 2 for more information about setting up reminders for individual employees as well as group reminders.

In this chapter, the following topics should help you set up and maintain your district's training records:

- Using the Training Search Screen
- Viewing Training Records for an Individual Employee
- Adding Training Records for Individual Employees
- Adding Training for a Group of Employees
- Editing an Individual Employee's Training Records
- Generating and Printing Training Reports
- Deleting Training Records

Using the Training Search Screen

To access the Training Search screen, click on the Training tab in the Employee search screen (see *Figure 4-1*):



	Search Employees Image: Constraint of the security Maintain Window Help File Security Maintain Window Help Tuesday, September 07, 2004 T.O.M. Employee Management Tuesday, September 07, 2004	
	🙍 Employees 🖾 Reminders 🧠 Training 🗮 Absences 🗇 Accidents	Training tab
You can use fields on the General tab to	Type: Image: Search Entire Instructor: Image: Search Entire Location: Search Entire Image: I	
search records. Then, you can use the Sorting	General Sorting	
tab to sort the records.		
	Find Now Reset Group Training Group Reminder Print Exit	

Figure 4-1. Training screen

Searching Training Records

To search your employee training records perform the following steps:

- 1. Click the Training tab. The Employee Management system displays the Training tab (Figure 4-2).
- 2. Click the Reset button to clear the screen. The Employee Management system clears the screen.

	🖳 Search Employees							
	File Security Maintain Window Help							
	T.O.M. Employee Management							
	🙋 Employees 🖾 Reminders 🤏 Training 🛣 Absences 😌 Accidents							
	Type: Number of Training Hours between and and and							
	Location: T Search Entire							
	General Sorting							
	Emp # Name Date Instructor Time(Hrs) Location	-						
Click Reset to clear the screen.								
	Find Now Reset Group Training Group Reminder Print Exit							





3. Select or type the criteria you want to use in your search, or leave all the fields blank if you want to view all employees who have completed training. For information about the fields on the subtabs, see the General Subtab and Sorting Subtab sections below.

	Do I have to complete the entire screen?
D T.O.M Tip	No. You do not need to complete all the fields on the Training tab to search training records. In fact, if you want to view all employees who have completed training, 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 training criteria again, and click Find Now.
	Where do the training codes come from?
	You can add, edit, and delete training codes by selecting File>Training Codes.

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

Figure 4-3 shows the results of a search using instructor code and location as the search criteria:

Empl	ovees Reminders 🧐	Training 😹	Absences & Accident	s	70 Record(s) Fou
e Embr					
Ту	/pe:	•	Numb	per of Training Hours	between
Inet	uctor 227			and	
L	ocation: lounge	V Searc	h Entire Training D	ate falls between:	
				▼ and	•
					2000
General [Sorting				
General [Sorting	Date	Instructor	Time/Hrs	
General [Emp #	Sorting	Date) Location
General [Emp # 58 80	Sorting Name CLURK, DONNIE DILIEN, MARIA	Date 11/5/2003 10/22/2	Instructor MULDENUDE, EVA ETTE KATHRYN	 Time(Hrs) 2 3) Location On-Site DRIVER LOUNG
General [Emp # 58 80 81	Sorting Name CLURK, DONNIE DILIEN, MARIA DILIEN, MAYRA	Date 11/5/2003 10/22/2 10/22/2	Instructor MULDENUDE, EVA ETTE, KATHRYN ETTE, KATHRYN	Time(Hrs)) Location On-Site DRIVER LOUNG DRIVER LOUNG
General [Emp # 58 80 81 82	Sorting Name CLURK, DONNIE DILIEN, MARIA DILIEN, MAYRA DILISUDE, EVERARDO	Date 11/5/2003 10/22/2 10/22/2 10/22/2	Instructor MULDENUDE, EVA ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN	Time(Hrs) 2 3 3 3 3) Location On-Site DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG
General [Emp # 58 80 81 82 602	Soting CLURK, DONNIE DILIEN, MARIA DILIEN, MAYRA DILSUDE, EVERARDO DIWULF, ROSE	Date 11/5/2003 10/22/2 10/22/2 10/22/2 10/22/2	Instructor MULDENUDE, EVA ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN	 2 3 3 3 3 3 3) Location On-Site DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG
General Emp # 58 80 81 82 602 603	Sorting Name CLURK DONNIE DILIEN, MARIA DILIEN, MAYRA DILSUDE, EVERARDO DIWULF, ROSE Dummy, Dummy	Date 11/5/2003 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2	Instructor MULDENUDE, EVA ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN	Time(Hrs) 2 3 3 3 3 3 3 3 3 3) Location On-Site DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG
General [Emp # 58 80 81 82 602 603 76	Sorting Name CLURK, DONNIE DILIEN, MARIA DILIEN, MAYRA DILSUDE, EVERARDO DIWULF, ROSE Dummy, Dummy DUVIS ETTA	Date 11/5/2003 10/22/2 10/22/2 10/22/2 10/22/2 11/5/2003	Instructor MULDENUDE, EVA ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN MULDENUDE EVA	Time(Hrs) 2 3 3 3 3 3 2 2	0n-Site DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG ORIVER LOUNG On-Site
General Emp # 58 80 81 82 602 603 76 77	Sorting Name CLURK, DONNIE DILIEN, MARIA DILENDE, EVERARDO DILSUDE, EVERARDO DIWULF, ROSE Dummy, Dummy DUVIS, ETTA DUVIS, LONNELL	Date 11/5/2003 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 11/5/2003 10/22/2	Instructor MULDENUDE, EVA ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN MULDENUDE, EVA ETTE, KATHRYN	Time(Hrs) 2 3 3 3 3 3 2 3 3 3 3 3 3 3 3 3 3 3 3	0n-Site DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG On-Site DRIVER LOUNG
General [Emp # 58 80 81 82 602 603 76 77 77 78	Sorting Name CLURK DONNIE DILIEN, MARIA DILSUDE, EVERARDO DIWULF, ROSE Dummy, Dummy DUVIS, ETTA DUVIS, LONNELL DUVIS, LONNELL DUVIS, MARIA	Date 11/5/2003 10/22/2 10/22/2 10/22/2 10/22/2 11/5/2003 10/22/2 10/22/2	Instructor MULDENUDE, EVA ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN MULDENUDE, EVA ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN	Time(Hrs) 2 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	Driver LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG On-Site DRIVER LOUNG DRIVER LOUNG

Figure 4-3. Results of a sample training search using the instructor and location criteria



General Subtab

You can use the following criteria on the General subtab (see Figure 4-1) to search training records:

- Type. Allows you to search employee records using the various training type codes you can set up.
- **Instructor.** Allows you to search for records matching an instructor's identification number. You can also click the Instructor button to search for an instructor alphabetically—when you click on the instructor's name and click OK (see Figure 4-4), the Employee Management system displays the employee's identification number in this field:

Find an Employe	• yees						
Last Name: First Name: Employee # 355 356 459 470	Last Name TRIPPI FERNIY YEUNS LURSEN	First Name JEAN JOHN KEITH DIANA	Employee Type: Emplo SUPE SUPE SUPE	SBO RE RT SBO SCH T T R XNG	RELIEF RETIRED SUPERVISOR OF B BASE SCHEDULER TERMINATED TRANSFERED CROSSING GUARD	JS OPERAT	Results of a search using Employee Type. After you click Find Now, select an employee and click OK, their employee number appears in the Instructor field.
Find Now				ОК	Cancel		

Figure 4-4. Selecting an instructor

- Location. Allows you to search using the location where the training occurred.
- Search Entire. Allows you to search for any locations having characters you typed into Location. For example, suppose you use Staff Lounge as one of your locations. If you type in *lounge* and then click the Find Now button without checking the Search Entire checkbox, the Employee Management system will not return any records unless your database contains a location whose entire name is Lounge. If, however, you check the Select Entire checkbox, the Employee Management system retrieves all locations having the word *Lounge* in them, meaning it would retrieve records with locations such as *Staff Lounge* as well as *Driver Lounge*.
- Number of Training Hours between. Allows you to search records using a range of training hours. For example, you could search for all records having training records between 10 and 15 hours. The other option you have is to search for records having a specific number of training hours. For example, if you want to search for records having 10 hours of training time, type 10 into both fields.
- **Training Date falls between.** Allows you to search for training records with training that occurred within a particular time period. For example, you could search for all training occurring between September 1, 2004, and September 28, 2004. You can also search for all training that occurred on a specific date by only adding the date to the first date field.
 - » You can access the calendar by clicking on the pull-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. If you do not select the day, the Employee Management system uses the first day of the month as the default value.



» 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.

Sorting Subtab

To make the training search results more useful to view, print, or generate reports from, the Employee Management software allows you to change the sort order of the search results. 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 for each field.



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

① T.O.M Tip You can sort training records at any point. When you sort training records, you are sorting displayed records. Also, 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 training records. Then, click Find Now to refresh 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 Training Search Options with General Employee Search Options

You can combine training search options with search options that are available on the Employees tab. For example, you can search for all employees who are drivers and who took training in the driver lounge.

- 1. Click the Employees tab.
- 2. Click the Reset button to clear the screen. The Employee Management system clears the screen.
- 3. Select the employee search criteria. Figure 4-5 shows Driver being selected as the Employee Type on the Employees tab.



	🖷 Search Employees 📃 🗆 🔀	
	File Security Maintain Window Help	
	T.O.M. Employee Management	
	👮 Employees 🖾 Reminders 😽 Training 🖾 Absences 😚 Accidents	
	Employee ID: Gender	
	Last Name: First First	
	Address: Search Entire Ethnicity:	Select your
	Employee Type: D	employee search
	General User Defined Employment Dates Sorting A(ND) NON-DRIVING AIDE	options. In this
	Employee # Last Name First Name Employee Type Phone Address A(R) AIDE RETIRED	example, Driver is
	C CAR DRIVER	the Employee
	D DRIVER	Type.
		-) P **
Click Reset to		
clear the		
screen.	Show on Map New Edit Delete	
	Find Now Reset Group Training Group Reminder Print Exit	

Figure 4-5. Selecting Driver as the Employee Type

- 4. Click the Training tab. The Employee Management system displays the Training screen.
- 5. Select the training criteria you want to include in the search. Figure 4-6 shows searching for training that occurred in the Driver Lounge:

Bearch Employees								
T.O.M. Employee Management								
🙍 Employees 🔤 Reminders 🧕 Training 🛣 Absences 🔗 Accidents								
Type: Instructor: Location: driver lounge	Search Entire	Number of Training Hours between and Training Date falls between: and and						
General Sorting	Date Instructor	Time/Hrs) location						
		,						
Find Now Reset	Group Training Grou	up Reminder Print Exit						

Figure 4-6. Searching for training that occurred in the driver lounge



6. Click the Find Now button to retrieve all the employee records in the database that match the training search criteria *and* that belong to employees who match the Employee search criteria.

Figure 4-7 shows the result of a search of employees who are drivers AND completed training in the Driver Lounge:

	T	T.O.M. Empl	oyee N	Managemen	it Tu	esday, September 07, 2	
	🧟 Employees 🛛 🔀 Reminders 🕸 Training 🖾 Absences 🖓 Accidents					48 Record(s) Found	
	Ту	ype:	•	Numl	ber of Training Hours	between	
	Instr	ructor.			and		
			Sear	ch Entire Training D	Date falls between:		
			, court		▼ and	•	
	General [Sorting	Date	Instructor	Time(Hrs)	Location	
	General [Emp #	Sorting] Name DILIEN MARIA	Date	Instructor	Time(Hrs)	Location DRIVER LOUNG	
	General [Emp # 80 81	Sorting Name DILIEN, MARIA DILIEN, MAYRA	Date 10/22/2 10/22/2	Instructor ETTE, KATHRYN ETTE, KATHRYN	Time(Hrs) 3 3	Location DRIVER LOUNG DRIVER LOUNG	
	General Emp # 80 81 82	Soting Name DILIEN, MARIA DILIEN, MAYRA DILSUDE, EVERARDO	Date 10/22/2 10/22/2 10/22/2	Instructor ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN	Time(Hrs) 3 3 3 3	Location DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG	
	General [Emp # 80 81 82 602	Sorting Name DILIEN, MARIA DILIEN, MAYRA DILSUDE, EVERARDO DIWULE, ROSE	Date 10/22/2 10/22/2 10/22/2 10/22/2	Instructor ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN	Time(Hrs) 3 3 3 3 3	Location DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG	
	General [Emp # 80 81 82 602 602 603	Sorting Name DILIEN, MARIA DILIEN, MAYRA DILSUDE, EVERARDO DIWULF, ROSE DIWULF, ROSE Dummy, Dummy	Date 10/22/2 10/22/2 10/22/2 10/22/2	Instructor ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN	Time(Hrs) 3 3 3 3 3 3 3 3 3 3	Location DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG	
	General Emp # 80 81 82 602 603 77	Setting Name DILIEN. MARIA DILIEN. MAYRA DILSUDE, EVERARDO DIWULF, ROSE Dummy, Dummy DUVIS, LONNELL	Date 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2	Instructor ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN	Time(Hrs) 3 3 3 3 3 3 3 3 3 3	Location DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG	
	General Emp # 80 81 82 602 603 77 78	Sorting Name DILIEN, MARIA DILIEN, MAYRA DILSUDE, EVERARDO DIWULF, ROSE Dummy, Dummy DUVIS, LONNELL DUVIS, MARIA	Date 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2	Instructor ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN	Time(Hrs) 3 3 3 3 3 3 3 3 3 3 3 3 3	Location DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG	
	General Emp # 80 81 82 602 603 77 78 650	Sorting Name DILIEN, MARIA DILIEN, MAYRA DILSUDE, EVERARDO DIWULF, ROSE Dummy, Dummy DUVIS, LONNELL DUVIS, MARIA E'chIU, Iisa	Date 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2	Instructor ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN	Time(Hrs) 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	Location DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG	
	General [Emp # 80 81 82 602 603 77 78 650 626	Setting Name DILIEN, MARIA DILIEN, MAYRA DILSUDE, EVERARDO DIWULF, ROSE DUMMY, DUMMY DUVIS, LONNELL DUVIS, MARIA E'chlU, Iisa JEHNSEN, ANIKA	Date 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2	Instructor ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN	Time(Hrs) 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	Location DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG	
ind	General Emp # 80 81 82 602 603 77 78 650 626 ≰	Setting Name DILIEN, MARIA DILIEN, MAYRA DILSUDE, EVERARDO DIWULF, ROSE Dummy, Dummy DUVIS, LONNELL DUVIS, MARIA E'chIU, Iisa JEHNSEN, ANIKA	Date 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2	Instructor ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN	Time(Hrs) 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	Location DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG DRIVER LOUNG	
7ind	General Emp # 80 81 82 602 603 77 78 650 626 《	Setting Name DILIEN, MARIA DILIEN, MAYRA DILSUDE, EVERARDO DIVULF, ROSE Dummy, Dummy DUVIS, LONNELL DUVIS, MARIA E'chIU, lisa JEHNSEN, ANIKA	Date 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2 10/22/2	Instructor ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN ETTE, KATHRYN	Time(Hrs) 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	Location DRIVER LOL DRIVER LOL DRIVER LOL DRIVER LOL DRIVER LOL DRIVER LOL DRIVER LOL DRIVER LOL	

Figure 4-7. Results of a search of drivers who completed training in the Driver Lounge

Viewing Training Records for an Individual Employee

- 1. Click the Employees tab.
- 2. Click the Reset button to clear the screen. The Employee Management system clears the screen.
- 3. Select the search criteria.
- 4. Click the Find Now button to retrieve all the training records in the database that match your selected criteria.

Figure 4-8 shows using Smith as the search criteria:



💀 Search Employees	
File Security Maintain Window Help Thursday, September 02, 2004 Thursday, September 02, 2004 Thursday, September 02, 2004	
👮 Employees 🖾 Reminders 🍕 Training 🖏 Absences 😚 Accidents 6 Record(s) Found	
Employee ID: SSN: Gender Last Name: smith First C Male Address: Search Entire Ethnicity:	
General User Defined Employment Dates Sorting	Q destates
Employee # Last Name First Name Employee Type Phone Address 264 SMITH ALVIN DRIVING AIDE 28 Rte 3 North 338 SMITH DONALD DRIVER 8987889087 438 SMITH LATASHA DRIVER 265 SMITH DERECCO DRIVER	employee record you want to view,
260 SMITH STANLEY DRIVER 5151234567 127 ELM STREET 339 SMITH VANESSA DRIVER 5151234567 127 ELM STREET	and click Edit. You can also double-click the record.
Show on Map New Edit Delete Find Now Reset Group Training Group Reminder Print Exit	

Figure 4-8. Search results of Smith

- 5. To display the Employee screen:
 - Double-click the employee's record.

OR

- Select the employee record, and click Edit.
- 6. Click the Training tab. The Employee Management system displays the employee's training (Figure 4-9).



Employment	& License Reminders No	tes Accidents Ab	sences Training	User Defined	SMITH, STANLEY
raining Date	Instructor	Time(Hrs)	Location	Туре	Comment
8/15/2004	TRIPPI, JEAN	10	Staff Lounge	INSERVICE	Update for district
<	m			to I	

Figure 4-9. Viewing training records for an individual employee

Adding Training Records for Individual Employees

You can add training to individual employee's records. However, if you need to add the same training to many employees, you will find it more efficient to add the training to a group of employees rather than adding the same information to employee records one at a time. For information about adding training to a group of employees, see the Adding Training for a Group of Employees section later in this chapter.

This section is divided into two parts:

- Adding Training to an Individual Employee. Explains the steps for adding training to the system.
- **Employee Training Screen.** Explains all the fields on the Employee Training screen as well as specific procedures such as selecting the instructor, searching training types, looking up training codes, and applying training to open reminders.

Adding Training to an Individual Employee

1. Click the Add button on the Training screen (Figure 4-10).





Figure 4-10. Adding a training record

The Employee Management system displays the Employee Training screen.

2. Select or type in the information you want to save with the training record. You are required to select training Date and Instructor. For a detailed description of all the fields on this screen, see the Employee Training Screen section later in this chapter for more information about this screen.

After you complete the fields, the screen will look similar to:



	Employee Training
	SMITH, STANLEY ID#686
	Date: 8/31/2004 Time: 5 (Number of Training Hrs)
	Instructor: 459 YEUNS, KEITH
	Location: Driver Lounge City:
	County:
	Type: OTHER C Original © Renewal C Make-Up C Additional
	Comments
	Units: 3 Training for medical emergencies
	In-Service cds:
	For Reference Purposes Only
	Vehicle #: Proficient Codes IN-SERVICE
Click here	T/C cds: EMP Code Description
to save the	BTW cds: E EVACUATION EMP EMERGENCY PROCEDURES
training	Brake cds: F FIRST AID GI GENERAL INFO
record.	Equip cds:
	OK Apply Hrs Open Reminder Exit

Figure 4-11. Completing the Employee Training screen

3. Click the OK button to save the training record and close the screen.

The Employment Management system updates the database and displays the new record:

	Employee Mainter	iance -				_ 🗆 🛛
	Er Er	SMITH, STANLEY ID#686				
	General Employmen	& License Reminders	Notes Accidents Ab	sences Training	User Defined	
	Date	Instructor	Time(Hrs)	Location	Туре	Comment
The new record	8/15/2004	TRIPPI, JEAN YEUNS, KEITH	10 5	Staff Lounge Driver Lounge	INSERVICE OTHER	Update for district c Training for medica
	<	101	Add i	Edit Dele	ete	٨
	ОК		Routes	3		Exit

Figure 4-12. Sample of added training record



Employee Training Screen

Employee Training	
SMITH, STANLEY ID#686	
Date: 8/31/2004 Time: 5 (Number of Training Hrs) Instructor: 459 YEUNS, KEITH Location: Driver Lounge City: County: City: Type: OTHER OTHER Comments	
Units: 3 In-Service cds: Vehicle #: T/C cds: EMP	[]
BTW cds: BTW cds: Brake cds: Equip cds: CK Apply Hrs Open Reminder Exit	View-only area for looking up training codes.

Figure 4-13. Training screen fields

You can add the following training information to the system:

- Date. Allows you to select or type in the date the training occurred.
 - » 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. If you do not select the day, the Employee Management system uses the first day of the month as the default value.
 - » 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.
- **Time.** Allows you to enter the number of training hours to be credited to the employee.
- **Instructor.** Allows you to select the training instructor. For information about completing this field, see the Searching for an Instructor section later in this chapter.
- Location. Allows you to enter the location where the training occurred. You can type up to 100 alphanumeric characters into this field, meaning you can type letters and numbers.
- **City.** Allows you to enter the city where the training occurred. You can enter up to 20 letters into this field.
- **County.** Allows you to enter the county where the training occurred. You can enter up to 50 letters into this field.
- **Type.** Allows you to select the type of training the employee completed. For information about completing this field, see the Searching the Training Types section later in this chapter. In addition to this, you can select whether the training course was:



- » Original (Default value)
- » Renewal
- » Make Up
- » Additional
- Units. Allows you to enter the number of training units the employee should receive for this training course. You can enter up to 30 alphanumeric characters into this field.
- **Comments.** Allows you to add additional training information. You can type any number of characters into this field.
- In Service Cds. (*In-Service Codes*) Allows you to enter the code for in-service training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section later in this chapter.
- Vehicle #. Allows you to select the vehicle number of the vehicle assigned to the employee.
- **Proficient.** Allows you to select whether the employee was considered to be proficient after the training.
- Various Training Codes. Allows you to type multiple training codes into T/C, BTW, Brake, and Equip. You can click the Codes button to look up what codes you want to type into these fields. However, the Employee Management system does *not* check your entries in these fields to ensure they are valid entries. If you type more than one code into one of these fields, you might find it easier to read your entries if you separate them with commas.
 - » T/C Cds. (Terrain/Condition Codes) Allows you to enter the code(s) for terrain/condition training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section later in this chapter.
 - » BTW Cds. (Behind the Wheel Codes) Allows you to enter the code(s) for behind the wheel training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section later in this chapter.
 - » Brake Cds. (Brake Codes) Allows you to enter the code(s) for brake training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section later in this chapter.
 - » Equip Cds. (Equipment Codes) Allows you to enter the code(s) for equipment training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section later in this chapter.
- **Codes.** Allows you to look up training codes. When you select a training category, you can view the training codes in the Codes box. This area of the screen is view-only. You can learn more about selecting training codes in the Looking Up Training Codes section later in this chapter.

Searching for an Instructor

The procedure below shows you how to search for an instructor employee by clicking the Instructor button. You can also choose an instructor employee by clicking the pull-down arrow and selecting the employee from the drop-down list. However, if you have many employees in your district, you might find that it is faster to click the Instructor button and use the procedure below to select the instructor employee rather than scrolling through the drop-down list.

1. Click the Instructor button.



	Employee Training
	SMITH, STANLEY ID#68
Click this button to search for employees.	Date: 8/31/2004 Time: 5 (Number of Training Hrs)
You can also click the pull- down arrow and select an employee from the drop-down list.	County Type: Units: 3 In-Service cds:
1.00.	For Reference Purposes Only
	Vehicle #. Proficient Codes
	T/C cds: Code Description
	BTW cds:
	Brake cds:
	Equip cds:
	OK Apply Hrs Open Reminder Exit

Figure 4-14. Searching for instructors

The Employee Management system displays the Find an Employer screen.

2. Type in the criteria you want to use to search for the employee.

Figure 4-15 shows the results of using the Employee Type as the search criteria:

	Find an Employ	ee						
	Emplo	oyees						
	Last Name:			Employee Type:	SBO RE RT	RELIEF RETIRED		Results of a search using Employee Type.
	Employee # 355 356 459	Exact Name TRIPPI FERNIY YEUNS	First Name JEAN JOHN KEITH	SUPER SUPER SUPER SUPER	SBO SCH T TR	SUPERVISOR OF BU BASE SCHEDULER TERMINATED TRANSFERED	JS OPERAT	After you click Find Now, select an employee and
Click here after	470	LURSEN	DIANA	SUPER	ANG ANSORT	CROSSING GUARD		click OK, their employee number appears in the Instructor field.
you enter your search criteria.	Find Nov	v		(ок	Cancel		

Figure 4-15. Selecting an instructor

3. Click the Find Now button to search for employees matching your search criteria.



4. Select the employee, and click the OK button. The Employee Management system closes the screen and displays the selected employee's identification number in the Instructor field:

	Employee Training
The selected	SMITH, STANLEY ID#686
employee's identification number appears here.	Date: 8/31/2004 Time: 5 (Number of Training Hrs) Instructor: 459 YEUNS, KEITH Location: County: Type: County: Type: Comments Comments Comments
	Vehicle #: Proficient T/C cds: BTW cds: Brake cds: Equip cds: OK Apply Hrs Open Reminder Exit For Reference Purposes Only Codes Codes Description

Figure 4-16. Adding the instructor to the training record

Searching the Training Types

The procedure below shows you how to search for a training type, or category, by clicking the Type button. You can also choose a training type by clicking the pull-down arrow and selecting the type from the drop-down list. However, if you have many training types in your database, you might find that it is faster to click the Type button and use the procedure below to select the training type rather than scrolling through the drop-down list.

1. Click the Type button.



	Employee Training	
	Viraining	SMITH, STANLEY ID#686
	Date: 8/31/2004 Time: 5 (N Instructor:	umber of Training Hrs)
	Location: City:	
Click this button to search for training types.	County: Type: Comments	inal 🕫 Renewal 🤇 Make-Up 🤇 Additional
You can also click the pull- down arrow and		
select a training	Vehicle #. Vehicle #. Vehicle #. Vehicle #. Vehicle #.	ce Purposes Only
type from the drop-down list.	T/C cds: Code	Description
	Equip cds: OK Apply Hrs Open F	Reminder Exit

Figure 4-17. Searching for training types

The Employee Management system displays the Search Training Codes screen.

2. Select the training code.

Figure 4-15 shows selecting the BTW (Behind the Wheel) training code:

	Search Training Code			
	Training		Total: 4	
	Category: TRAINING	3	×	
	Category	Code	Description	Active
	TRAINING	BTW	BEHIND THE WHEEL TRAINING	True
	TRAINING	CLASSRO	CLASSROOM TRAINING	True
	TRAINING	INSERVICE	IN-SERVICE I RAINING	True
1		UTIEN		The
Click here after				
you select the		New	Edit Delete	
training code.	ОК		Print	Exit

Figure 4-18. Selecting an instructor

3. Select the training code, and click the OK button. The Employee Management system closes the screen and displays the selected training code in the Type field:



	Employee Training	
		#686
	Date: 8/31/2004 Time: 5 (Number of Training Hrs)	
	Location: Driver Lounge City:	
	County: C Original @ Renewal C Make-Up C Addition	nal
The selected training code appears here	Units: Comments	<
appears nere.	Vehicle #: Proficient T/C cds: BTW cds: Brake cds: Code Description Code Description 	
	OK Apply Hrs Open Reminder Exit	

Figure 4-19. Adding the training type to the training record

Looking Up Training Codes

The T.O.M. Employee Management Software allows you to specify multiple training codes that apply to the various subjects that were covered in the class. Since a class may cover more than one subject the T.O.M. Employee Management Software allows you to specify more than one code and to organize those codes into four sections:

- T/C (Terrain/Condition) Codes
- BTW (Behind The Wheel) Codes
- Brake Codes
- Equipment Codes

Since most of these codes are either abbreviated numbers or letters, you may find it hard to remember what the various codes are. To help you, the Employee Management software gives you an easy and powerful Code Lookup feature.

The procedure below shows you how to look up a training code by clicking the Codes button. You can also look up a training code by clicking the pull-down arrow and selecting the code from the drop-down list. However, if you have many training codes in your database, you might find that it is faster to click the Codes button and use the procedure below to look up the training code rather than scrolling through the drop-down list. Lastly, if you know the training code, you can type it into the appropriate code box.

To look up and add the training code:

1. Click the Codes button.



	SMITH, STANLEY ID#686	
Date: 8/31/2004 Time: E Instructor: 459 YEUNS, K Location: Driver Lounge County: Type: BTW Units:	Comments (Number of Training Hrs) (Number	
In-Service cds:	For Reference Purposes Only	Click this button to search for training codes.
T/C cds: BTW cds: Brake cds:	Code Des BRAKE BTW EQUIPMENT IN-SSRVICE	You can also click the pull- down arrow and select a training

Figure 4-20. Searching for training codes

The Employee Management system displays the Search Training Codes screen.

2. Select the training category by clicking the pull-down arrow.

Figure 4-15 shows selecting the BTW (Behind the Wheel) training code:

	Search Tr	aining Codes					
After you select a category, you can see all the	Category	ning Code	s •			Tota	1: 5
training codes associated with that category. Select one of the codes.	Catego BTW BTW BTW BTW BTW BTW	BRAKE BRAKE BTW EQUIPMENT IN-SERVICE TERRAIN/CONDITIONS		SCRIPTIO	n HICLE FAMIL IN TRAINING SSION CON VE DRIVING GER LOAD/U	IARIZATION IN VEHICLE MOVE TROL/SHIFT NLOAD	Active True True True True True
Click here after you select the training code.		K	lew	Edit	Delete	Print	Exit

Figure 4-21. Selecting a training category

3. Select a code, and click the OK button. The Employee Management system closes the screen and displays the codes associated with the selected training category.



4. Type the training code into the appropriate box.

Figure 4-22 shows the codes associated with the BTW training type as well as the training code typed into the appropriate box. In this case, the training code was 4, Defensive Driving.

	Employee Training	
	SMITH, STANLEY ID#686	
	Date: 8/31/2004 Time: 5 (Number of Training Hrs) Instructor: 459 YEUNS, KEITH Location: Driver Lounge City: County: County: Type: BTW	
	Units: In-Service cds: For Reference Purposes Only	
Type the training code into one of these boxes.	Vehicle #: Proficient T/C cds: BTW BTW cds: A Brake cds: Brake cds: Equip cds: Codes	The codes associated with the selected category appear here.
	OK Apply Hrs Open Reminder Exit	

Figure 4-22. Adding the training code to the training record

Applying Training Hours Against Individual Employee Training Reminders

The Employee Management system can track the number of hours employees must complete for a certain type of training as well as the number of hours completed. To track the number of hours required for an employee for a certain category of training, you must create a training reminder in the Employee Management system.

When you add training hours to the system for an individual employee or a group of employees, you can apply completed hours to the training reminder. For example, suppose an employee must complete 20 inservice hours and that he just completed five of those hours with a training class he just completed.

When you add the training record to the system, you can specify that those five hours be applied to the reminder. The Employee Management system deducts the completed hours, so the reminder now shows that the employee now has 15 hours to complete.



Where can I learn more about reminders?

T.O.M Tip
 Refer to Chapter 2 for more information about setting up reminders for individual employees as well as group reminders.



To apply training hours against employee reminders:

- 1. Complete the training screen.
- 2. Click the Apply Hrs Open Reminder button (Figure 4-23).

	Employee Training
	SMITH, STANLEY ID#686
	Date: 8/31/2004 Time: 5 (Number of Training Hrs)
	Location: Driver Lounge City:
	County: Type: BTW V C Original @ Renewal C Make-Up C Additional
	Units:
	In-Service cds:
	For Reference Purposes Only
Click here to select the	Vehicle #: Image: Proficient Codes BTW T/C cds: Image: Proficient Codes Image: Proficient BTW cds: Image: Proficient Image: Proficient Image: Proficient Image: Proficient Image: Proficient Image: Proficient Image: Proficient BTW cds: Image: Proficient Image: Proficient Image: Proficient Image: Proficient Image: Profi
reminder.	Brake cds: 4 DEFENSIVE DRIVING Equip cds: 5 PASSENGER LOAD/UNLOAD
	OK Apply Hrs Open Reminder Exit

Figure 4-23. Applying training hours to an open reminder

The Employee Management system displays the Select Reminder and Apply Training Hours screen showing all open reminder records for this specific employee (Figure 4-24).

3. Select the open reminder you want to apply the training hours to.

	Apply Training Ho	urs				
	Se Se	Select Reminder and Apply Trai				
	Category:		• Туре:	•	Show • Only Pending	
	Category	Туре	Due Date	Rqd Hours Achieved	Complete Date Comment	
Select the reminder and click here to apply the training hours to the open	LICENSECERT TRAINING	LICENSE BTW	9/30/2004 12/31/2004		4	
reminder.	Find Now		Apply Train	ing Hours	Cancel	

Figure 4-24. Selecting an open reminder and apply training hours to it



4.. Click the Apply Training Hours button. The Employee Management system applies the hours to the open reminder and updates the Training screen (Figure 4-25:

Employee Training	V
SMITH, STANLEY ID#686 Training Date Hours were Applied: 9/13/2004	Y ou can see when the hours were
Date: 8/31/2004 Time: 5 (Number of Training Hrs)	applied.
Instructor: 459 YEUNS, KEITH	
Location: Driver Lounge City:	
County:	
Type: BTW C Original © Renewal C Make-Up C Additional	
Units:	
For Reference Purposes Only	When this
Vehicle #: Proficient BTW	button is
T/C cds: Code Description 1 BASIC VEHICLE FAMILIARIZATION	grayed out,
BTW cds: 3 2 PRECISION TRAINING IN VEHICLE MOVE 3 TRANSMISSION CONTROL/SHIFT	the hours have
Brake cds: 4 DEFENSIVE DRIVING 5 PASSENGER LOAD/UNLOAD	already been
Equip cds:	applied to an
OK Apply Hrs Open Reminder Exit	reminder.

Figure 4-25. Training screen after applying hours to open reminder

Adding Training for a Group of Employees

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

This section is divided into two parts:

- Adding Training for a Group of Employees. Explains how to add group training to a group of employees.
- Log Training for a Group Screen. Explains all the fields on the Group Training screen as well as specific procedures such as selecting the instructor, searching training types, looking up training codes, and applying training to open reminders.

Adding Training to a Group of Employees

- 1. Click the Employees tab.
- 2. Click the Reset button to clear the screen. The Employee Management system clears the screen.
- 3. Select employee search criteria.
- 4. Click the Find Now button to retrieve all employee records matching the search criteria.

Figure 4-26 shows Driver being selected as the Employee Type on the Employees tab.





Figure 4-26. Selecting Driver as the Employee Type

- 5. Click the Group Training button. The Employee Management system displays the Log Training for a Group screen (Figure 4-27).
- 6. Select or type in the information you want to save with the training record. You are required to select training Date and Instructor. For a detailed description of all the fields on this screen, see the Log Training for a Group Screen section later in this chapter.
- 7. The T.O.M. Employee Management Software automatically fills the Available Employees list with the search results in the Employees Search screen. From this list you may further refine which employees are to receive credit for the Training class by individually adding them to the Selected Employees list or you may simply choose to add all the employees found in the Employee Search to the Selected Employees list.

To add the employees to the group:

- Select an employee, and click the Add button. The Employee Management system adds the selected employee to the group. His name now appears in the Selected Employees box.
- Click the Add All button. The Employee Management system adds all the listed employees to the group. Their names now appear in the Selected Employees box.

NOTE: The Employee Management system will automatically fill the Available Employees list with the search results in the Employees Search screen. From this list, you may further refine which employees are to receive credit for the Training class by individually adding them to the Selected Employees list or you may simply choose to add all the employees found in the Employee Search to the Selected Employees list.

8. To remove employees from the group:



- Select an employee, and click the Remove button. The Employee Management system removes the selected employee from the group. His name now appears in the Available Employees box.
- Click the Remove All button. The Employee Management system removes all the listed employees from the group. Their names now appear in the Available Employees box.
- Click Reset List to start over.

After you complete the fields, the screen will look similar to:

	Date: 9/13/2004 -	Time: 5	(Number o	Training Hrs) You ca	an use
Loc C Ty	ictor: 356 Filesation: Driver Lounge City: City: BTW	ERNIY, JOHN		Comments BTW IN-SERVICE CLASSROOM these t add m inform to the training Vehicle #: Proficient to the training T/C cds: BTW cds: Brake cds:	abs to ore lation group g.
• Ori	ginai (Renewai			Equip cds:	
Ori Available	e Employees:			Selected Employees: 413 selected	1
Ori Available Emp#	e Employees:	Туре	Add >>	Equip cds: Selected Employees: 413 selected Emp# Employee Type Use the	nese buttons to
Ori Availabl Emp# 307 211	e Employees: Employee WILLIUMS, DELMETRIA	Type DRIVER	Add >>	Selected Employees: 413 selected Use th add er add er	nese buttons to nployees to and
Ori Availabl Emp# 307 311 37	e Employees: Employee WILLIUMS, DELMETRIA ZUMUSE, MARIA LREWN, MADELINA	Type DRIVER DRIVER DRIVER	Add >> < <remove< td=""><td>Selected Employees: 413 selected Emp# Employee Type Use th 36 ERWIN, CHERRY DRIVEF add er 38 LREWN, PAMELA DRIVEF remov</td><td>nese buttons to nployees to and 'e them from</td></remove<>	Selected Employees: 413 selected Emp# Employee Type Use th 36 ERWIN, CHERRY DRIVEF add er 38 LREWN, PAMELA DRIVEF remov	nese buttons to nployees to and 'e them from
Ori Availabl Emp# 307 311 37 40	e Employees: Employee WILLIUMS, DELMETRIA ZUMUSE, MARIA LREWN, MADELINA LRYUNT, VERLISA	Type DRIVER DRIVER DRIVER DRIVER	Add >> < <remove Add All</remove 	Selected Employees: 413 selected Emp# Employee Type Use th 36 ERWIN, CHERRY DRIVEF add er 38 LREWN, PAMELA DRIVEF remov 42 LUINE, HUGO DRIVEF the gr	nese buttons to nployees to and 'e them from oup.

Figure 4-27. Results of adding training to a group of employees

Log Training for a Group Screen

You can add the following training information to the system (see Figure 4-27):

- Date. Allows you to select or type in the date the training occurred.
 - » 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. If you do not select the day, the Employee Management system uses the first day of the month as the default value.
 - » 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.
- Time. Allows you to enter the number of training hours to be credited to the group of employees.
- **Instructor.** Allows you to select the training instructor. For information about completing this field, see the Searching for an Instructor section.



- **Location.** Allows you to enter the location where the training occurred. You can type up to 100 alphanumeric characters into this field, meaning you can type letters and numbers.
- **City.** Allows you to enter the city where the training occurred. You can enter up to 20 letters into this field.
- **County.** Allows you to enter the county where the training occurred. You can enter up to 50 letters into this field.
- **Type.** Allows you to select the type of training the employee completed. For information about completing this field, see the Searching the Training Types section. In addition to this, you can select whether the training course was:
 - » **Original** (Default value)
 - » Renewal
- Look Up Training Codes. Allows you to look up training codes to enter into T/C, BTW, Brake, and Equip. You can click the this button to look up what codes you want to type into these fields. However, the Employee Management system does *not* check your entries to ensure they are valid entries in these fields. If you type more than one code into one of these fields, you might find it easier to read your entries if you separate them with commas.
- **Comments subtab.** Allows you to add additional training information. You can type any number of characters into this field.

Lookup Training Codes	
Comments BTW IN-SERVICE CLASSROOM	
This was the class that was rescheduled after last month's cancellation due to inclement weather.	Ţ

Figure 4-28. Comments subtab

• BTW subtab. (Behind the Wheel) Allows you to enter the following:

X	Lookup Training Codes
Comments BTW	IN-SERVICE CLASSROOM
Vehicle #:	Proficient
T/C cds:	
BTW cds:	
Brake cds:	
Equip cds:	

Figure 4-29. BTW subtab

- » Vehicle #. Allows you to select the vehicle number of the vehicle assigned to the employee.
- » **Proficient.** Allows you to select whether the employee was considered to be proficient after the training.
- » T/C Cds. (Terrain/Condition Codes) Allows you to enter the code for terrain/condition training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section.



- » BTW Cds. (Behind the Wheel Codes) Allows you to enter the code for behind the wheel training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section.
- » Brake Cds. (Brake Codes) Allows you to enter the code for brake training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section.
- » Equip Cds. (Equipment Codes) Allows you to enter the code for equipment training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section.
- In-Service subtab. Allows you to enter the following:

Lookup Training Codes
Comments BTW IN-SERVICE CLASSROOM
In-Service cds:

Figure 4-30. In-Service subtab

- » In Service Cds. (*In-Service Codes*) Allows you to enter the code for in-service training. If you do not know the code, you can look it up by clicking the Codes button. You can learn more about selecting training codes in the Looking Up Training Codes section.
- **Classroom subtab.** Allows you to enter the following:

	X	Lookup Train	ing Codes	
Comments	BTW	IN-SERVICE	CLASSROOM	Γ.
Units:		_		

Figure 4-31. Classroom subtab

• Units. Allows you to enter the number of training units the employee should receive for this training course. You can enter up to 30 alphanumeric characters into this field.

Searching for an Instructor

The procedure below shows you how to search for an employee by clicking the Instructor button. You can also choose an employee by clicking the pull-down arrow and selecting the employee from the drop-down list. However, if you have many employees in your district, you might find that it is faster to click the Instructor button and use the procedure below to select the employee rather than scrolling through the drop-down list.

1. Click the Instructor button.



		Log Tr	aining	for a (Grou	ıp	
lick this button		Date:	Time:	(Number o	of Training	Hrs)	
search for	Instru	ctor:				Lookup Training	Codes
mployees.	Loca	ation:			Comments	S BTW IN-SERVICE CL	ASSROOM
ou can also		etty:			L Inite:		
lick the pull-	0	unty:			Units.		
own arrow and elect an	Тур	e:	•				
nployee from	C Orig	inal C Renewal					
st.							
	Available	Employees:			Selected	Employees:	
	Emp#	Employee	Туре 🛆	Add >>	Emp#	Employee	Туре
	307	WILLIUMS, DELMETRIA	DRIVEF	< <remove< td=""><td></td><td></td><td></td></remove<>			
	309	YLUNIZ, ISMAEL	DRIVEF				
	311	ZUMUSE, MARIA		Ruu All			
	<			Remove All			
			Reset List				
	12						

Figure 4-32. Searching for instructors

The Employee Management system displays the Find an Employer screen.

2. Type in the criteria you want to use to search for the employee.

Figure 4-33 shows the results of using the Employee Type as the search criteria:

	Find an	Employee							
	Em	ploy	ees						
	Last N First N 355 356 459 470	ame: ame: loyee #	Last Name TRIPPI FERNIY YEUNS LURSEN	First Name JEAN JOHN KEITH DIANA	Employee Type: Employ SUPEF SUPEF SUPEF SUPEF	SBO RE RT SBO SCH T T TR XNG VISOR C	RELIEF RETIRED SUPERVISOR OF B BASE SCHEDULER TERMINATED TRANSFERED CROSSING GUARD	JS OPERAT	Results of a search using Employee Type. After you click Find Now, select an employee and click OK, their employee number appears in the
Click here after you enter your search criteria.		ind Now	1				Cancel		
search criteria.	F	ind Now			(ж	Cancel		

Figure 4-33. Selecting an instructor

3. Click the Find Now button to search for employees matching your search criteria.



4. Select the employee, and click the OK button. The Employee Management system closes the screen and displays the selected employee's identification number in the Instructor field:

	Log Training							
		Log Tra	aining	for a (Grou	ıp		
The selected	Dat	te:	Time:	(Number o	of Training I	Hrs)		
employee's	Instructor	. ↓ 356 ▼ FE	RNIY, JOHN			Lookup Trainin	g Codes	
identification	Locatio	in:			Comments	BTW IN-SERVICE	CLASSROOM	1
number	Cit	ty:			Unite			
appears nere.	Count	tv:			Units.			
	Type:		•					
	C Original	C Renewal						
	Available En	nployees:			Selected	Employees:		
	Emp# E	Employee	Туре	Add >>	Emp#	Employee	T	уре
	307 V 308 V	WILLIUMS, DELMETRIA WEELIY, DORIS	DRIVEF	< <remove< td=""><td></td><td></td><td></td><td></td></remove<>				
	309 Y	LUNIZ, ISMAEL		Add All				
	310 7			Remove All				
			Reset List					
	Log Now							Exit

Figure 4-34. Adding the instructor to the training record

Searching the Training Types

The procedure below shows you how to search for a training type, or category, by clicking the Type button. You can also choose a training type by clicking the pull-down arrow and selecting the type from the drop-down list. However, if you have many training types in your database, you might find that it is faster to click the Type button and use the procedure below to select the training type rather than scrolling through the drop-down list.

1. Click the Type button.



	Log Traini	Log Tra	aining	for a	Grou	ıp	
	L	Date: 9/22/2004	Time: 5	(Number o	of Training I	Hrs)	
	Instruc	tor: 356 • FE	ERNIY, JOHN			Lookup Training	Codes
	Loca	tion: Classroom			Comments	BTW IN-SERVICE CL	ASSROOM
)	City:			Units:		
Click this button b search for caining types.	Со	unty:	•				
ou can also ick the pull-	C Origi	nal C Renewal					
own arrow and	Available	Employees:			Selected	Employees:	
one from the	Emp#	Employee	Туре 🔨	Add >>	Emp#	Employee	Туре
op-down list.	307 308	WILLIUMS, DELMETRIA	DRIVEF	< <remove< td=""><td></td><td></td><td></td></remove<>			
	309 311 312	YLUNIZ, ISMAEL ZUMUSE, MARIA 21 IMLIDDIDLI MADIA		Add All Remove All			
	,		Reset List				
			State of the second second				

Figure 4-35. Searching for training types

The Employee Management system displays the Search Training Codes screen.

2. Select the training code.

Figure 4-36 shows selecting the BTW (Behind the Wheel) training code:

	Search Training Code	95		
	Training	Codes		Total: 4
	Category: TRAINING	3	×	
	Category	Code	Description	Active
	TRAINING	BTW	BEHIND THE WHEEL TRAINING	True
	TRAINING	CLASSRO	CLASSROOM TRAINING	True
	TRAINING	INSERVICE	IN-SERVICE TRAINING	True
	TRAINING	OTHER	OTHER TYPE OF TRAINING	True
Click here after				
you select the		New	Edit Delete	
training code.	ОК		Print	Exit

Figure 4-36. Selecting an instructor

3. Select the training code, and click the OK button. The Employee Management system closes the screen and displays the selected training code in the Type field:



	Log Training	g for a Group
	Date: 9/22/2004 Time: 5	(Number of Training Hrs)
	Instructor: 356 FERNIY, JOHN	Lookup Training Codes
	Location: Classroom	Comments BTW IN-SERVICE CLASSROOM
	City: County:	
The selected training code	C Original C Renewal	
appears nere.	Available Employees:	Selected Employees:
	Emp# Employee Type	Add >> Emp# Employee Type
	307 WILLIUMS, DELMETRIA DRIVEF	< <remove< td=""></remove<>
	309 YLUNIZ, ISMAEL DRIVEF 311 ZUMUSE, MARIA DRIVEF	IIA bbA
		Remove All
	Reset List	
	Log Now	Exit

Figure 4-37. Adding the training type to the training record

Looking Up Training Codes

As discussed previously, you can add the general training category (such as In-Service) to the training record. When you look up codes and then type them into these fields, the Employee Management system does *not* check your entries to ensure they are valid entries. If you type more than one code into one of these fields, you might find it easier to read your entries if you separate them with commas.

The procedure below shows you how to look up a training code by clicking the Lookup Training Codes button. If you know the training code, you can type it into the appropriate code box on the BTW or In-Service tabs.

To look up and add the training code:

1. Click the Lookup Training Codes button.

The Employee Management system displays the Search Training Codes screen.

2. Select the training category by clicking the pull-down arrow.

Figure 4-38 shows selecting the BTW (Behind the Wheel) training code:



Se	earch Tra Trai	ining Codes		Total	5
c	Category:	BTW	-		
After you select a category, you can see all the training codes associated with that category.	Categor BTW BTW BTW BTW BTW	BRAKE BTW EQUIPMENT IN-SERVICE TERRAIN/CONDITIONS TEST TRAINING		scription SIC VEHICLE FAMILIARIZATION ECISION TRAINING IN VEHICLE MOVE ANSMISSION CONTROL/SHIFT FENSIVE DRIVING SSENGER LOAD/UNLOAD	Active True True True True True
Click here after you select the training code.	он Марика С	New		Edit Delete Print	Exit

Figure 4-38. Selecting a training category

- 3. Find the code that describes the training.
- 4. Click the OK button. .
- 4. Type the training code into the appropriate box on the BTW or In-Service tab.

Figure 4-39 shows the code of 4, the code for Defensive Driving, added to the BTW tab:

Log Training Log Training Date Discount of Training	for a	Group	
Instructor 356	(Number	Lookup Training Codes	
Location: Classroom City: County: Type: BTW]	Comments BTW IN-SERVICE CLASSROOM	Type the training code into the appropriate box on the BTW or In- Service tab.
Available Employees:		Selected Employees:	
Emp# Employee Type 307 WILLIUMS, DELMETRIA DRIVEF 308 WEELIY, DORIS DRIVEF 309 YLUNIZ, ISMAEL DRIVEF 311 ZUMUSE, MARIA DRIVEF 312 ZIMUIDDIDI I MADIA DRIVEF Image: Comparison of the state of the sta	Add >> < <remove Add All Remove All</remove 	Emp# Employee Type	
Log Now		Exit	

Figure 4-39. Adding the training code to the training record



Applying Group Training Hours Against Group Employee Training Reminders

To track the number of hours required for an employee for a certain category of training, you must create a training reminder in the T.O.M. Employee Management Software. When you add training hours to the system for a group of employees, you can apply completed hours to the training reminder. For example, suppose employees must complete 20 in-service hours and that they just completed five of those hours.

When you add the training record to the system, you can specify that those five hours be applied to the reminder. The Employee Management system deducts the completed hours, so the training reminder now shows that the employee now has 15 hours to complete.



To apply group training hours against group employee reminders:

- 1. Complete the group training screen.
- 2. Click the Log Now button. The Employee Management system displays the Apply Training Hours for a Group screen.

	Log Training				
	Log Tr	aining for a (Group		
	Date: 9/22/2004 -	Time: 5 (Number of	of Training Hrs)		
	Instructor: 356 F	ERNIY, JOHN	Lookup Training Codes		
	Location: Classroom		Comments BTW IN-SERVICE CLASSRO		
	City:		Vehicle #	+	
	County:		T/C cds:	-	
	Type: BTW	-	BTW cds: 4		
			Brako ede:		
C Original C Renewal			Equin cds:	2	
	-				
	Available Employees:		Selected Employees: 414 selected		
	Emp# Employee	Type Add >>	Emp# Employee	Type 🔺	
	307 WILLIUMS, DELMETRIA	DRIVER < <remove< td=""><td>308 WEELIY, DORIS 312 ZUMURRIPLI MARIA</td><td>DRIVEF</td></remove<>	308 WEELIY, DORIS 312 ZUMURRIPLI MARIA	DRIVEF	
Click hore	311 ZUMUSE, MARIA	DRIVER Add All	313 ZILIDEN, MARTHA	DRIVEF	
to apply	SLERIU, TONI	Remove All	105 SENZULIS, JUSE		
the hours to	<u>'</u>	Reset List	Lo I m		
a group	Log Now	A consistence of the constraint of the second		Exit	
reminder.			_		

Figure 4-40. Applying training hours to an open group reminder

The Employee Management system displays the Select Reminder and Apply Training Hours screen which shows all open group reminders..



3. Select the open group reminder you want to apply the training hours to. Figure 4-41 shows that the group reminder list is being filtered so that only BTW group reminders are displayed:



Figure 4-41. Selecting an open group reminder and apply training hours to it

4.. Click the Apply Training Hours button. The Employee Management system applies the hours to the open group reminder and displays a dialog when this process is complete.



Editing an Individual Employee's Training Records

1. In the individual Employee Training screen, select the training record you want to update, and click Edit. You can also double-click the training record (Figure 4-42).

	Employee	Maintenance -					_ 🗆 🔀
	General Emp	Emplo	Dyee Reminders Notes	Accidents Ab	sences Training	User Defined	SMITH, STANLEY ID#686
		ig Instructor		Timo/Hrc)	Location	Type	Commont
Select the training record you want to edit, and click Edit. You can also double-click the record.	8/11 8/13	22004 TRIPPI, 1/2004 YEUNS,	EAN KEITH	10 5	Staff Lounge Driver Lounge	INSERVICE OTHER	Update for district c Training for medica
	<			Add E	Edit Dele	te	۶
	(Ж		Routes	1		Exit

Figure 4-42. Editing training records

The Employee Management system displays the Employee Training screen.

- 2. Update the training record.
- 3. Click OK to save your changes. The Employee Management system closes the screen and updates the employee's training record.

Generating and Printing Training Reports

You can generate and print several types of training 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 training report you want to generate and to type in its title.



🖷 Search Employees					
File Security Maintain Window Help					
T.O.M. Employee Management					
🦉 Employees 🔤 Reminders 😽 Training) Found				
Employee ID:	SSN:	Gender			
Last Name: Smith	First:	i Male i Pellale			
Address:	Search Entire	Ethnicity:			
	Emplo	руее Туре:			
General User Defined Employment Dates Sorting					
Employee # Last Name First Name Er	nployee Type Phone	Address			
264 SMITH ALVIN DF 338 SMITH DONALD DF 438 SMITH LATASHA DF 265 SMITH REBECCA DF	RIVING AIDE RIVER 8987889087 RIVER RIVER	829 ORANGE AVE			
686 SMITH STANLEY DF 339 SMITH VANESSA DF	RIVER 5151234567 RIVER	127 FELICITY LANE 5609 N BIRCH AVE	Click the Print		
Show or Man	w Friit Delete		button to generate and print a training report.		
		/			
Find Now Reset Group	Training Group Reminder	Print	Exit		

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

Deleting Training Records

When you delete training from an employee's record, the Employee Management system removes it from the employee's record and adds the hours attributed to the training back to the number of hours required for completion.

To delete training from an employee's record:

- 1. Access the record of the employee whose training you want to adjust. The Employee Management system displays the Employees screen.
- 2. Click the Training tab. The Employee Management system displays the training records.
- 3. Select the training you want to delete (). The Employee Management system asks if you are sure you want to delete the record.



🖳 Employee Maintenance -	
Employee	SMITH, STANLEY ID#686
General Employment & License Reminders Notes Accidents Absences Training	User Defined
Training	
Date Instructor Time(Hrs) Location	Type Comment
8/15/2004 TRIPPI, JEAN 10 Staff Lounge	INSERVICE Update for district c
Diver Long, KLITT 5 Diver Longe	Select the training you want to delete.
	Click the Delete button to delete the
Add Edit Delete	from the employee record.
OK	Exit

Figure 4-43. Deleting training from an employee record

4. Click OK to delete the absence. The Employee Management system deletes the training from the employee's record.