Chapter 7
Employees, Their Hours and Schedules

T.O.M. was designed to store almost if not all of the information your department must retain for your employees. When you select the Employee Maintenance Routine the Employee Search screen displays (Figure 7-2). When entering employees into T.O.M., you must at least enter all of your drivers. However, it is to your benefit to enter ALL of your employees because you will then have just one place to go to look up information concerning your employees. Take a moment to study the Employee Directory to see the flexibility's in retrieving employee information offered to your department.

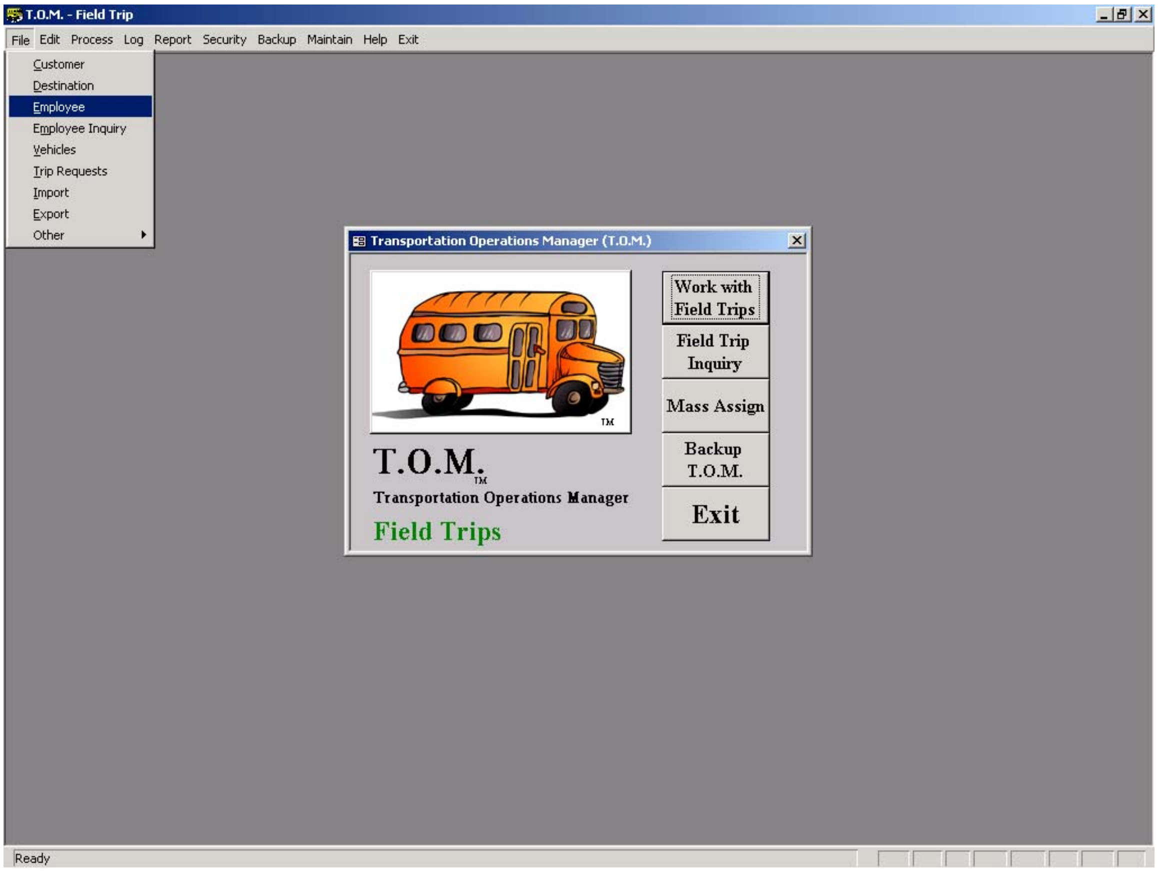


Figure 7-1. Accessing the Employee Search Screen

When setting up your employees, you can enter the employee's name, address, phone and social security number. You can also enter more specific information required by your department such as hire date, seniority, license #, license expiration date, and certification number.

You can categorize each employee by selecting one of the Employee Types from the Employee Type list that you previously setup. You can also select a vehicle to assign to the employee from the list of vehicles that you had previously setup. If you have defined one or more custom fields, you may also enter this specific information for each employee.

Working with Employees

Figure 7-2 is the list / search screen showing you all of the Employees that you have setup with T.O.M. From this screen you tell T.O.M. if you want to add a new Employee, change an existing Employee or remove existing Employee.

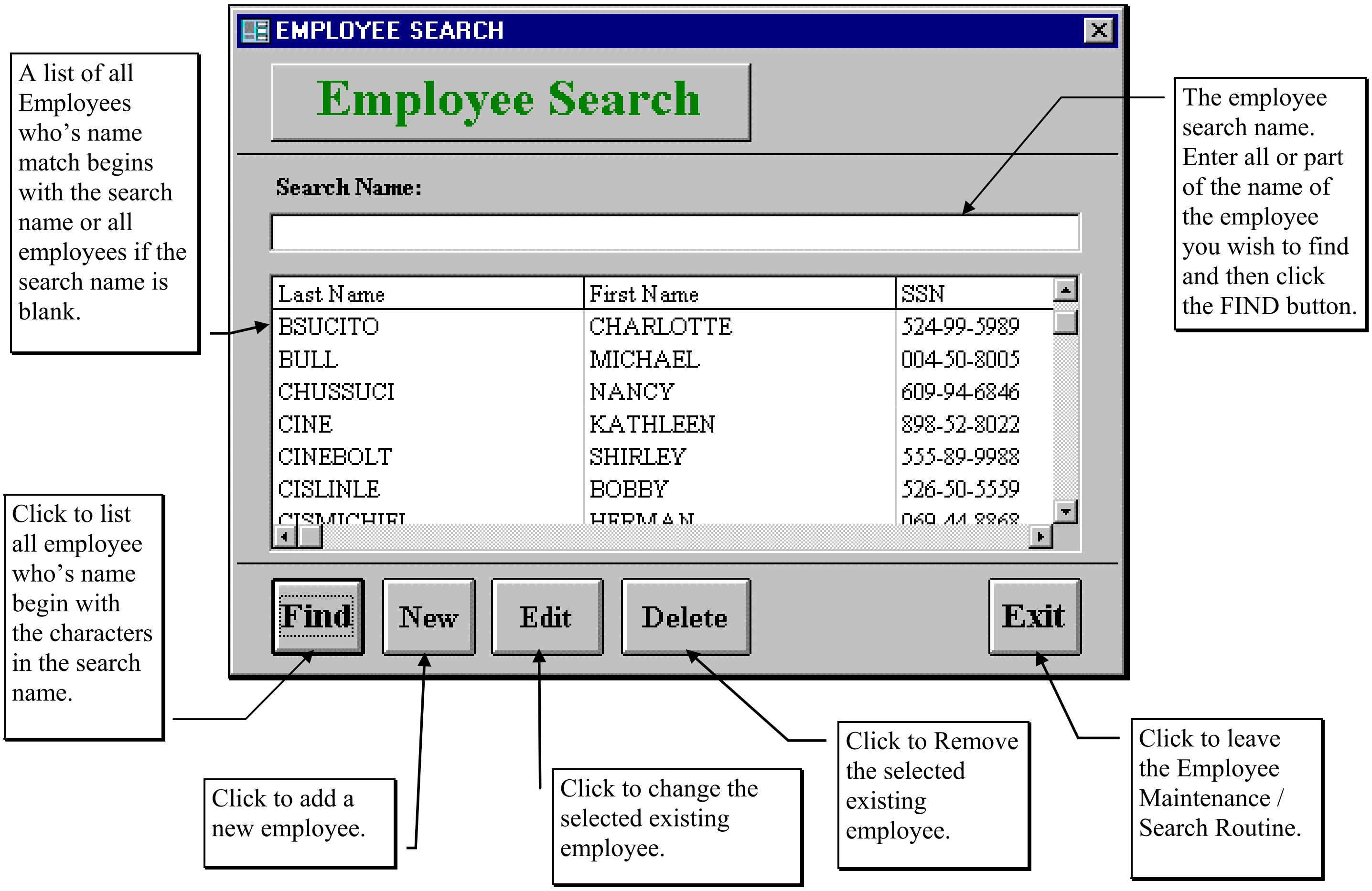


Figure 7-2. The Employee Search Screen

Finding an Employee

The Employee Search screen (Figure 7-2) offers you a very simple way to retrieve an existing Employee record. Simply type in all or part of the Employee's name and then click the Find button. After a moment a list of Employees who have names matching your search name will appear in a list below your search name. If you wish to change the search name, key over the last search name that you entered and then click the Find button again and the system will refresh the list of found Employees automatically.

Once you have spotted the Employee you desire, simply point to that name and click it and click the Edit button and you will be taken to the Employee Data Entry screen (Figure 7-3) with selected Employee displayed on the screen.

Adding a New Employee

If you wish to add a new Employee, click the New button on the Employee Search screen (Figure 7-2) and you will be taken to the Employee Data Entry screen (Figure 7-3). This screen will let you enter all of the

Employee information. To save the Employee information you have entered, click the OK button. To exit this screen without saving the information you have entered, click the Exit button. See *Employee Data Entry Screen Options* below for a complete description of data entry fields and options.

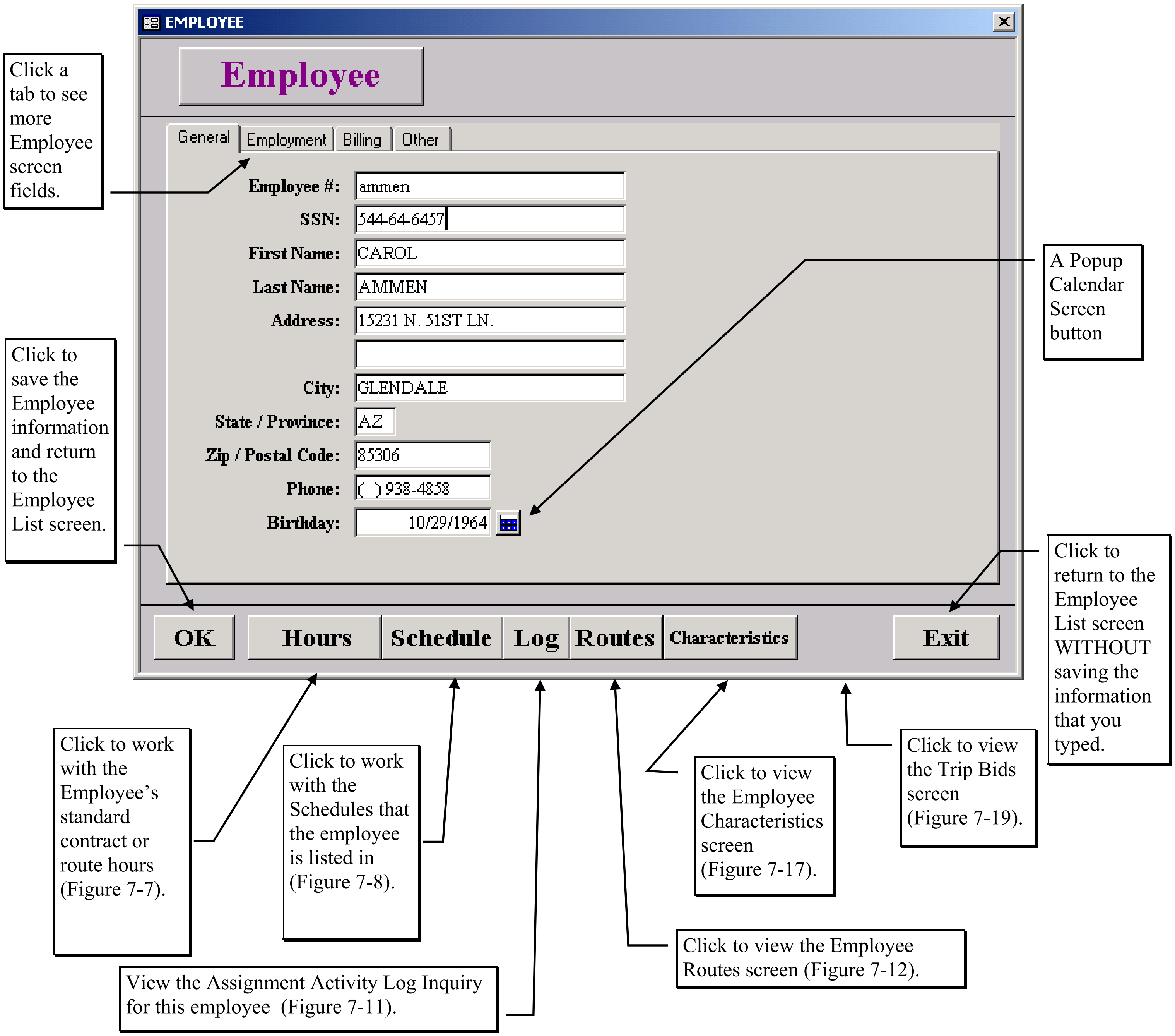


Figure 7-3. The General Tab on the Employee Data Entry Screen

Changing an Existing Employee

If you wish to change an existing Employee, then select an Employee on the Employee List screen (Figure 7-2) by clicking the row containing the desired Employee and then click the Edit button. You will be taken to the Employee Data Entry screen (Figure 7-3). This screen will let you change any of the Employee information except the Employee code. To save the Employee information you have changed, click the OK button. To exit this screen without saving the information you have entered, click the Exit button. See *Employee Data Entry Screen Options* below for a complete description of data entry fields and options.

Deleting an Existing Employee

If you wish to remove an existing Employee, then select an Employee on the Employee List (Figure 7-2) by clicking the row containing the desired Employee and then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this Employee. If you do confirm to T.O.M. that you want to delete the Employee, T.O.M. will remove the Employee from your T.O.M. database. **NOTE:** *T.O.M. will not allow you to delete an Employee that is being used by a Field Trip or Schedule.*

Employee Data Entry Screen Options

The Employee Data Entry screen uses four separate "tabs" of fields that allow you to enter all your employee information. To display a tab, simply click on the appropriate tab: General, Employment, Billing or Other. The following describes the data entry fields and options for each tab.

The General Tab on the Employee Data Entry Screen

The General tab on the Employee Data Entry screen (Figure 7-3) contains basic employee information.

Employee #: This is a number or code that you enter for this employee. It uniquely identifies the employee to T.O.M. The number can be up to 50 characters long including both numbers and letters.

SSN: This is the nine-digit social security number of the employee. It is 11 characters including the hyphens: 000-00-0000. This field is optional.

First Name: This is the first name of the employee. It is 15 characters long.

Last Name: This is the last name of your employee. It is 30 characters long. **NOTE:** The way that you enter your employee last name here is the way you must search for it alphabetically in the Employee Search screen.

Address: This field uses two lines to enter the employee's street address. Each line is 30 characters.

City: This is the city where the employee is located. It is 15 characters.

State / Province: This is the state (U.S.) or province (Canada) where the employee is located. It is 2 characters.

Zip / Postal Code: This is the zip code (U.S.) or postal code (Canada) of the employee. It is 10 characters.

Phone: This is the home phone number of the employee. When you enter this phone number, T.O.M. automatically enters the parentheses around the area code and places a dash between the third and the fourth digit of the root phone number. If you do not wish to enter an area code with the phone number, then enter three spaces in place of the area code and T.O.M. will automatically position you to the first digit of the main phone number.

Birthday: This is the birth date of the employee. The Employee Directory Report allows you to list a group of employees whose birthdays fall within a date range that you enter. This feature may be a useful risk management tool in monitoring if any of your drivers would exceed some type of age limit that is specified by your district or state. This feature can also be used to give a list of employees who have a birthday for this month. For more information about the Employee Directory see *The Employee Directory* in *Chapter 7 - Master File Reports* in the *T.O.M. User Guide*.

T.O.M. makes it easy for you to key in any date. Rather than having to type in a "/" or a"-" when typing in the date, T.O.M. automatically places a "/" between the Month, Day and Year (this is called "masking'). You must, however, enter 2 digits for the month and the day. So, for example if you were entering a date of "3/2/1994" you would type "03021994" and T.O.M. would automatically place two "/" in the appropriate positions in the date. The year must be entered as the full year (ex. "1997" not "97'). If for some reason this mask feature of T.O.M. gets confused you then must enter the entire date including the slashes.

To make entering a date an even easier process T.O.M. also has a popup calendar screen that lets you just click on the day that you want and it fills in the appropriate date. To activate this popup calendar screen just click on the little button next to this date field that looks like a small calendar. For more information on T.O.M.'s Pop Up Calendar screen see *Appendix C - The Pop Up Calendar Screen* later in this manual.

The Employment Tab on the Employee Data Entry Screen

The Employment tab on the Employee Data Entry screen (Figure 7-4) allows you to enter more specific employment-related information about the employee.

Hire Date: This is the date the employee was hired in your district. For drivers it is CRITICAL that you enter this date. T.O.M. uses the employee's hire date and the employee's seniority to position the employee in the automatic assignment schedules that you will build. These schedules are lists of drivers used which T.O.M. places in descending order by the Employee's Hire Date and then the Employee's Seniority. When you enter field trips you specify which Schedule T.O.M. should use when it automatically assigns drivers and vehicles to the field trip.

You may add drivers to these schedules or remove drivers from the schedules at any time. Whenever you add a driver to a schedule, T.O.M. automatically positions that driver in the list according to the driver's Hire Date and Seniority. For more information about schedules see the section *Schedules* in *Chapter 3 - Entering Lookup Lists* in the manual. Also see *Appendix A - Schedules - Setting Them Up and How They Affect Automatic Assignment* in this manual. For more information about how T.O.M. performs automatic assignment see *Chapter 2 - Assigning Drivers and Vehicles to Field Trips, Printing Trip Tickets and Garage Check List* in the *T.O.M. User Guide*.

T.O.M. makes it easy for you to key in any date. Rather than having to type in a "/" or a"-" when typing in the date, T.O.M. automatically places a "/" between the Month, Day and Year (this is called "masking'). You must, however, enter 2 digits for the month and the day. So, for example if you were entering a date of "3/2/1994" you would type "03021994" and T.O.M. would automatically place two "/" in the appropriate positions in the date. The year must be entered as the full year (ex. "1997" not "97'). If for some reason this mask feature of T.O.M. gets confused you then must enter the entire date including the slashes.

To make entering a date an even easier process T.O.M. also has a popup calendar screen that lets you just click on the day that you want and it fills in the appropriate date. To activate this popup calendar screen just click on the little button next to this date field that looks like a small calendar. For more information on T.O.M.'s Pop Up Calendar screen see *Appendix C - The Pop Up Calendar Screen* later in this manual.

The Employee Directory will allow you to select a list of employee's who were hired on a date range that you specify. For more information about the Employee Directory see the section *The Employee Directory* in *Chapter 7 - Master File Reports* in the *T.O.M. User Guide*.

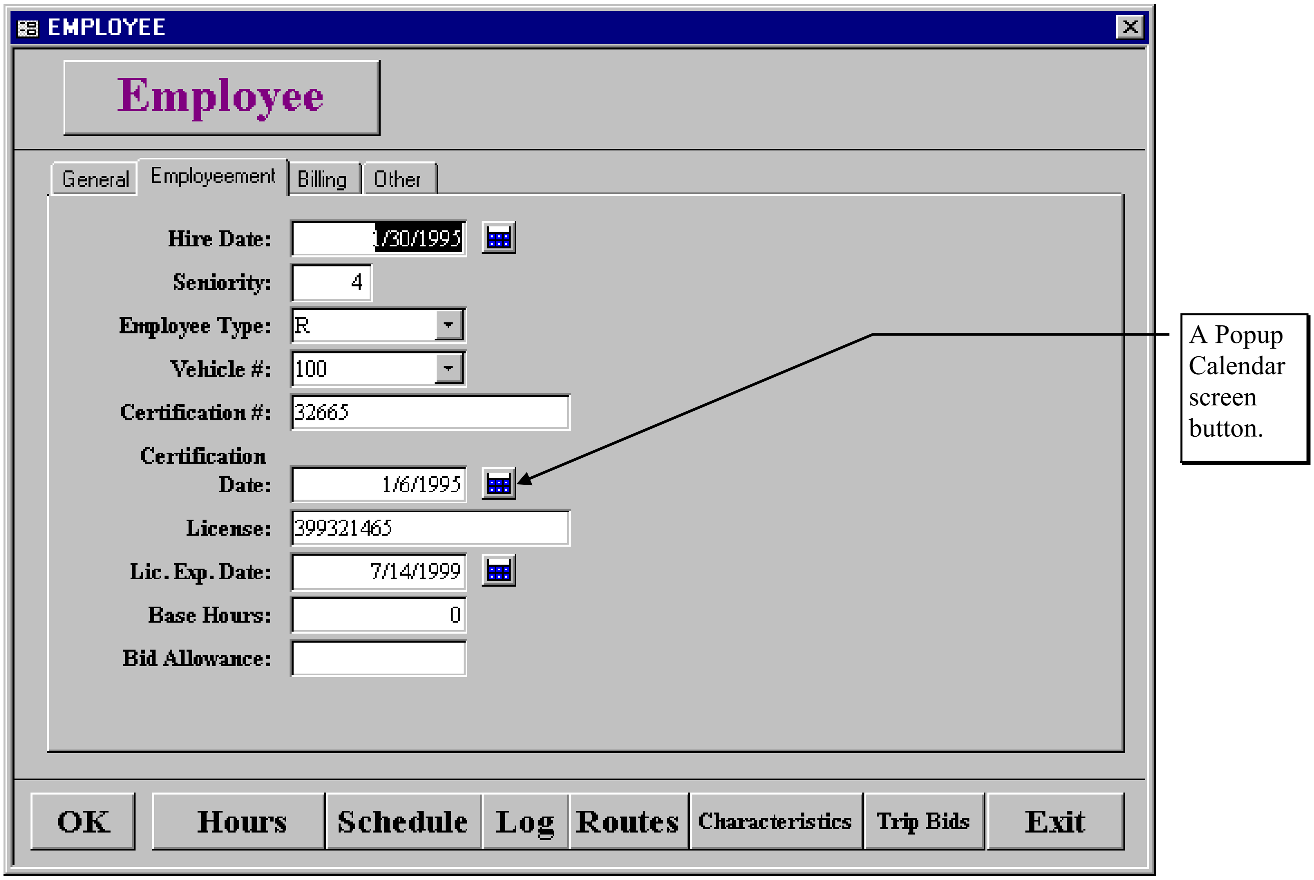


Figure 7-4. Employment Tab on the Employee Data Entry Screen

Seniority: This is the seniority number assigned to the employee by your district. You may enter any number in this field from 0 to 99,999. Typically districts use the seniority number to break any seniority tie that would occur when more than one employee has the same Hire Date. For drivers it is CRITICAL that you enter this date. T.O.M. uses the employee's hire date and the employee's Seniority to position the employee in the automatic assignment schedules that you will build. These schedules are lists of drivers used which T.O.M. places in descending order by the Employee's Hire Date and then the Employee's Seniority. When you enter field trips you specify which Schedule T.O.M. should use when it automatically assigns drivers and vehicles to the field trip.

You may add drivers to these schedules or remove drivers from the schedules at any time. Whenever you add a driver to a schedule, T.O.M. automatically positions that driver in the list according to the driver's Hire Date and Seniority. For more information about schedules, see the section *Schedules* in *Chapter 3 - Entering Lookup Lists* in this manual. Also see *Appendix A - Schedules - Setting Them Up and How They Affect Automatic Assignment* in this manual. For more information about how T.O.M. performs automatic assignment see *Chapter 2 - Assigning Drivers and Vehicles to Field Trips, Printing Trip Tickets and Garage Check List* in the ***T.O.M. User Guide***.

Employee Type: This is a category of employee that you have previously defined. The Employee Type allows you to enter all of the employees in your Transportation / Maintenance Department and classify them by their position. The valid Employee Types should be defined and entered into T.O.M. before you begin entering your employees. For more information about Employee Types, see the section *Employee Type* in *Chapter 3 - Entering Lookup Lists* in this manual. The Employee Directory Report allows you to list a group of employees with an Employee Type that you designate. For example, this feature allows you to list all of your drivers or all of your crosswalk guards. For more information about the Employee Directory, see the section *The Employee Directory* in *Chapter 7 - Master File Reports* in the *T.O.M. User Guide*.

Vehicle #: If the employee is a driver, then you may also specify the normal vehicle that he or she drives. When assigning this employee to field trips, T.O.M. will always attempt to give that employee his / her normal vehicle. If the vehicle is not the vehicle type required for the field trip or if the vehicle is already scheduled for another field trip, then T.O.M. will assign the employee a different vehicle from the spare vehicle list.

The button with the arrow pointing down to the right of this field indicates that this field is a drop down list field. If you click this button, you are given the valid choices available for this field. For this field you are given a list of all of your vehicles in vehicle number order. For more information about how T.O.M. assigns vehicles to field trips see *Chapter 2 - Assigning Drivers and Vehicles to Field Trips, Printing Trip Tickets and Garage Check List* in the *T.O.M. User Guide*.

The vehicle assigned to the employee is also used in the Employee Directory Report. This report is sophisticated enough to provide you a list of employees that drive a specific vehicle or those that drive a specific vehicle type. Using this report, therefore, you could print a list of drivers that are assigned to vehicle #102 or you could print a list of drivers that are assigned to drive Small Handicap vehicle types. By assigning vehicles to employees you also give T.O.M. the information it needs to derive what vehicle type that employee drives. For more information about the Employee Directory see the section *The Employee Directory* in *Chapter 7 - Master File Reports* in the *T.O.M. User Guide*.

Certif.#: This is the certification number of the employee. It is 50 characters long. You can enter both numbers as well as letters in this field. This field is an optional field.

Certification Date: If the employee is certified, this is the date on which the employee was certified. T.O.M. makes it easy for you to key in any date. Rather than having to type in a "/" or a"-" when typing in the date, T.O.M. automatically places a "/" between the Month, Day and Year (this is called "masking'). You must, however, enter 2 digits for the month and the day. So, for example if you were entering a date of "3/2/1994" you would type "03021994" and T.O.M. would automatically place two "/" in the appropriate positions in the date. The year must be entered as the full year (ex. "1997" not "97'). If for some reason this mask feature of T.O.M. gets confused you then must enter the entire date including the slashes.

To make entering a date an even easier process T.O.M. also has a popup calendar screen that lets you just click on the day that you want and it fills in the appropriate date. To activate this popup calendar screen just click on the little button next to this date field that looks like a small calendar. For more information on T.O.M.'s Pop Up Calendar screen see *Appendix C - The Pop Up Calendar Screen* later in this manual.

The Employee Directory will allow you to select a list of employee's who were certified on a date range that you specify. For more information about the Employee Directory see the section *The Employee Directory* in *Chapter 7 - Master File Reports* in the *T.O.M. User Guide*.

License: If the employee is a driver, then you may enter the employee's driver's license number in this field. It is 25 characters long. You may enter numbers or letters in this field.

Lic. Exp. Date: If the employee is a driver, then you may enter his / her driver's license expiration date in this field. The Employee Directory allows you to list all drivers whose license will expire within a date range that you specify. This feature can be a very useful risk management tool for your district. For example, with this feature you can print a list of drivers whose licenses will expire next month and follow-up with those drivers to ensure that their driver's licenses are renewed before they continue driving the district's vehicles. For more information about the Employee Directory see the section *The Employee Directory* in *Chapter 7 - Master File Reports* in the *T.O.M. User Guide*.

T.O.M. makes it easy for you to key in any date. Rather than having to type in a "/" or a"-" when typing in the date, T.O.M. automatically places a "/" between the Month, Day and Year (this is called "masking'). You must, however, enter 2 digits for the month and the day. So, for example if you were entering a date of "3/2/1994" you would type "03021994" and T.O.M. would automatically place two "/" in the appropriate positions in the date. The year must be entered as the full year (ex. "1997" not "97'). If for some reason this mask feature of T.O.M. gets confused you then must enter the entire date including the slashes.

To make entering a date an even easier process T.O.M. also has a popup calendar screen that lets you just click on the day that you want and it fills in the appropriate date. To activate this popup calendar screen just click on the little button next to this date field that looks like a small calendar. For more information on T.O.M.'s Pop Up Calendar screen see *Appendix C - The Pop Up Calendar Screen* later in the book.

Base Hours: You will only use this field if your district has chosen to have T.O.M. automatically assign drivers to field trips using the Hours Averaging method. Many times in a year the district will hire a new employee or will allow an employee that previously didn't drive field trips to drive them. Or a driver may be sick and not be able to perform field trips for an extended period of time like a month. In any of these cases you then are faced with a situation of a driver being added to a list of drivers that has far less (if any) field trip hours than the other drivers on the list. If this situation were left alone T.O.M. would then heavily favor this new driver with field trip assignments for an extended period of time to bring that new driver's hours in line with the other drivers on the driver list (schedule).

Most districts would find that unacceptable. To deal with this situation T.O.M. allows you to enter an amount of hours called Base Hours that will be added to each driver's total field trip hours when T.O.M. recalculates a drivers field trip hours. Thus, when you add a new driver to a driver list you can simply determine the average hours of the other drivers and enter that average into the new driver's base hours and that new driver will be on equal footing with the other drivers in the driver list (schedule).

NOTE: T.O.M. provides you with an excellent report that will give you the average hours of all employees in a schedule or all employees in total. This report is called the Driver / Schedule Field Trip Hours Report. To learn more about this report see *Chapter 7 - Management Reports* in the *T.O.M. User Guide*.

If your district chooses to average hours WITHIN each schedule then you will not use the *Base Hours* field found in the employee screen. Rather, you will use the Base Hours field found in the Employee Schedule record. To learn more about the Employee / Schedule Base Hours field see *Changing an Employee's Base Hours for a Schedule* later in this chapter.

Bid Allowance: This field is only visible if you have selected Automatic Assignment Method or Bid in district options. It is the number of points an employee has remaining in a period that he / she can bid on a field trip (if the district is using the Bid Allowance method of Automatic Assignment). The user can enter points into this field and as the employee bids on trips and those bids get awarded the trip – T.O.M. automatically subtracts the number of points of the bid from this Bid Allowance.

The Billing Tab on the Employee Data Entry Screen

The Billing tab on the Employee Data Entry screen (Figure 7-5) allows you to enter certain billing information for the employee. The billing rate fields only come into play during billing if the field trip being billed uses a billing rate with a billing instruction of Employee Rates, Employee Rates with OT, or Employee Rates with Daily OT. When any of these billing instructions is selected, the user is asked to specify a number 1-6 that tells T.O.M. which set of employee rates T.O.M. will use when billing the field trip.

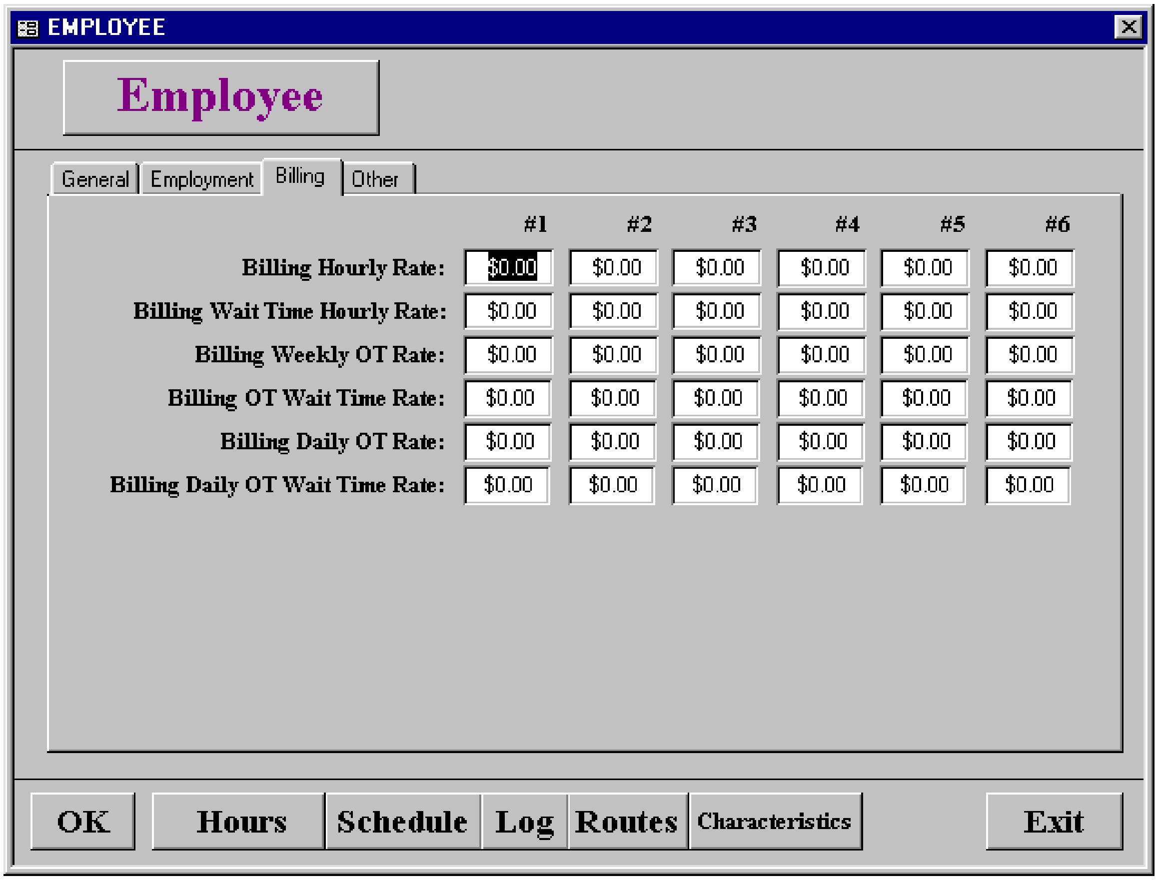


Figure 7-5. The Billing Tab on the Employee Data Entry Screen

Billing Hourly Rate: You can enter up to 6 different rates. Some districts have different billing rates depending on the employee or employees that perform the field trip. If you need to bill each employee that performs a field trip at a different hourly billing rate here is where you enter that hourly billing rate.

NOTE: Just entering an hourly billing rate in this field will not automatically cause T.O.M. to bill field trips that this employee drives at this rate. You must also set the Billing Instructions of the billing rate assigned to the field trip to the value Employee Rates', "Employee Rates with O.T', or 'Employee Rates with Daily O.T.'. This instructs T.O.M. to use the *Billing Hourly Rate* found for each employee when calculating a field trip bill. For more information about instructing T.O.M. to use the employee's *Billing Hourly Rate* see the section titled *Billing Rates* in *Chapter 3 - Entering Lookup Lists* of this manual.

Billing Wait Time Hourly Rate: You can enter up to 6 different rates. These rates reflect when a driver is waiting (that is, not driving) during a field trip. Some districts have different billing rates depending on the employee or employees that perform the field trip. If you need to bill each employee that performs a field trip at a different hourly billing rate here is where you enter that hourly billing rate.

A NOTE ABOUT OVERTIME (OT) RATES

This note applies to all OT rates described below. Some districts not only have different hourly billing rate for each employee but they have a different hourly billing rate when the field trip that the employee is performing causes that employee to go into overtime. If your district has a different billing rate for any overtime hours that an employee incurs while performing a field trip, here is where you enter that overtime billing rate.

Just entering an overtime hourly billing rate in this field will not automatically cause T.O.M. to bill the employee's overtime hours for field trips that this employee drives at this rate. You must also set the Billing Instructions of the billing rate assigned to the field trip to the value 'Employee Rates With O.T.' or 'Employee Rates with Daily O.T.'. This instructs T.O.M. to calculate if the field trip caused the employee to incur any overtime (either weekly or daily). *T.O.M. calculates this by first adding an employee's standard route hours (for the ENTIRE week for weekly overtime, for the ENTIRE day for daily overtime) then adding all field trips (for the week for weekly overtime, for the day for daily overtime) taken prior to the field trip being billed and then adding the employee's actual hours for the field trip. T.O.M. then compares these hours to the Weekly Overtime Hours or Daily Overtime Hours you specified in the District Options screen. If these hours are greater than the Weekly Overtime Hours or Daily Overtime Hours T.O.M. subtracts the Weekly Overtime Hours or Daily Overtime Hours from the calculated hours to give the number of hours of overtime for the field trip being billed.* If the field trip had overtime hours T.O.M. multiplies the overtime hours for the field trip by the either the Billing OT Rate for weekly overtime or the Daily OT Rate for daily overtime. For more information about instructing T.O.M. to use the employee's overtime Rate see the section titled *Billing Rates* in *Chapter 3 - Entering Lookup Lists* of this manual.

Billing Weekly OT Rate: You can enter up to 6 different weekly rates. See note above about overtime (OT) rates. This Rate is used if the Billing Instructions for the Billing Rate is set to 'Employee Rates with O.T.'.

Billing OT Wait Time Rate: You can enter up to 6 different rates. These rates reflect when a driver is waiting (that is, not driving) during a field trip. See note above about overtime (OT) rates. This Rate is used if the Billing Instructions for the Billing Rate is set to 'Employee Rates with O.T.'. This rate is multiplied against the OT Wait Time you entered for that particular driver for a particular field trip.

Billing Daily OT Rate: You can enter up to 6 different rates. See note above about overtime (OT) rates. This Rate is used if the Billing Instructions for the Billing Rate is set to 'Employee Rates with Daily O.T.'.

Billing Daily OT Wait Time Rate: You can enter up to 6 different rates. These rates reflect when a driver is waiting (that is, not driving) during a field trip. See note above about overtime (OT) rates. This Rate is used if the Billing Instructions for the Billing Rate is set to 'Employee Rates with Daily O.T.'. This rate is multiplied against the OT Wait Time you entered for that particular driver for a particular field trip.

The Other Tab on the Employee Data Entry Screen

The Other tab on the Employee Data Entry screen (Figure 7-6) allows you to enter custom field information.

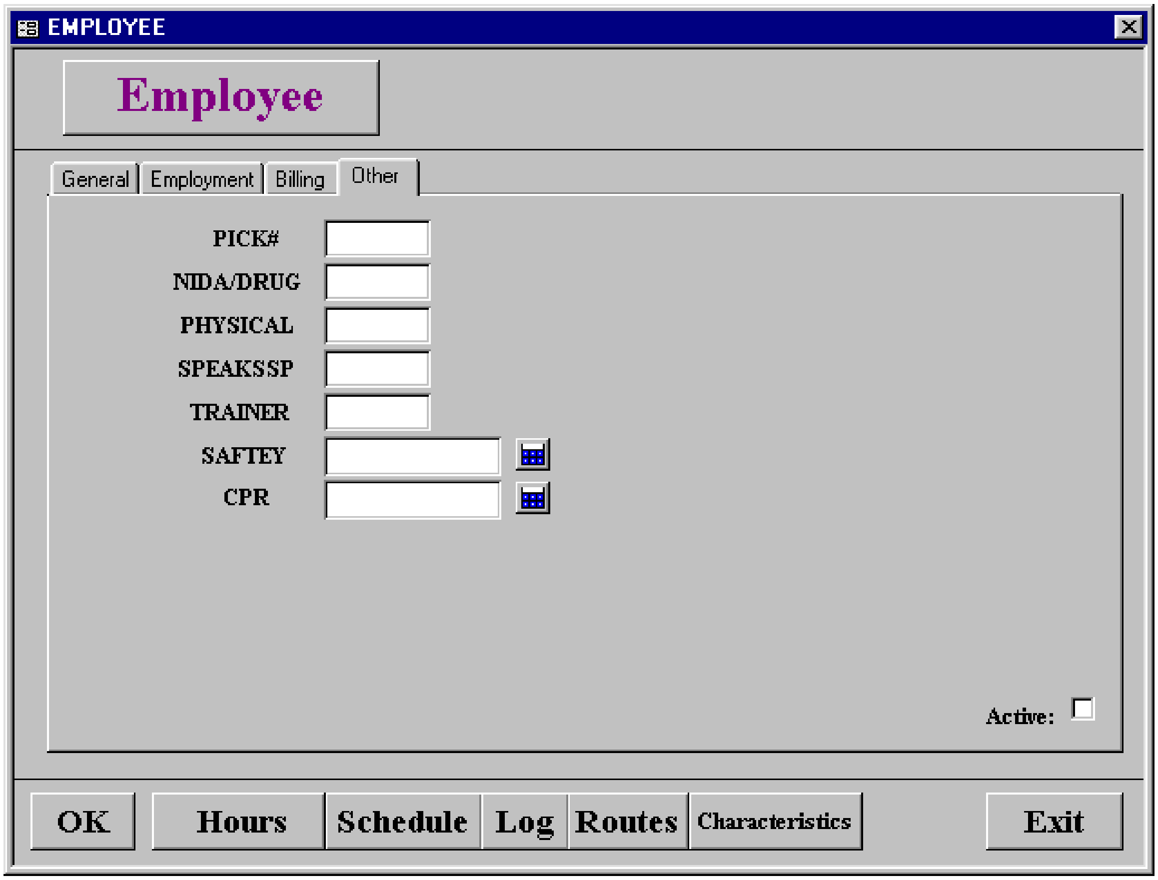


Figure 7-6. The Other Tab on the Employee Data Entry Screen

Custom Fields 1-5: These are the five user defined fields available for your use for each employee. They are NOT visible unless you have given them a caption. You give a custom field a caption by going into the Custom Fields screen from the District Options screen. Each of these custom fields is 5 characters long. You may enter either numbers or letters in these fields. They can be used to store any type of information or code that you require concerning your district's employees. You should be consistent on how you enter the value of the custom fields for all of the employees. T.O.M. allows you to select all employees with a certain value in these custom fields in the Employee Directory Report. The uses of these custom fields are limited only to your imagination! For more information about defining your employee custom fields see *Chapter 4 - District Options* in this manual. For more information about the Employee Directory see the section *The Employee Directory* in *Chapter 7 - Master File Reports* in the *T.O.M. User Guide*.

Custom Date Fields 1& 2: These are the two user defined date fields available for your use for each employee. They are NOT visible unless you have given them a caption. You give a custom date field a caption by going into the Custom Fields screen from the District Options screen. They can be used to store any type of date information that you require concerning your district's employees. T.O.M. allows you to select all employees with a certain date in these custom date fields in the Employee Directory Report. The uses of these custom fields are limited only to your imagination! For more information about defining your employee custom date fields see *Chapter 4 - District Options* in this manual. For more information about the Employee Directory see the section *The Employee Directory* in *Chapter 7 - Master File Reports* in the *T.O.M. User Guide*.

Active: This checkbox is used to signify if this is an active employee or not. If this box is checked, then the employee is considered active. If this box is not checked, then the employee is considered inactive. In the Employee Directory Report T.O.M. allows you to specify whether you wish to list active, inactive or all employee on the report. For more information about the Employee Directory see the section *The Employee Directory* in *Chapter 7 - Master File Reports* in the *T.O.M. User Guide*.

Working with Employee Hours

While entering the employee information, you may also enter the employee standard weekly hours. If you are entering in a driver, these hours may be the driver's standard route hours. NOTE: If you wish to have T.O.M. prevent overtime while automatically assigning drivers to field trips, then you MUST enter driver's route hours. These hours are used by the system in conjunction with field trip hours to determine if a field trip's hours will put the employee in an overtime situation.

To enter an employee's route hours click the Hours button on the employee screen which will cause the Hours screen (Figure 7-7) to display. This screen enables you to enter the employee's standard hours for each day of the week. When you finish entering the employee's standard hours, then simply click the Exit button and the system will store the hours information for the employee.

This screen will also allow you to clear the entire week's hours to zero and start over by clicking the Clear Hours button. When you click this button every day's hours will be set to the value of zero.

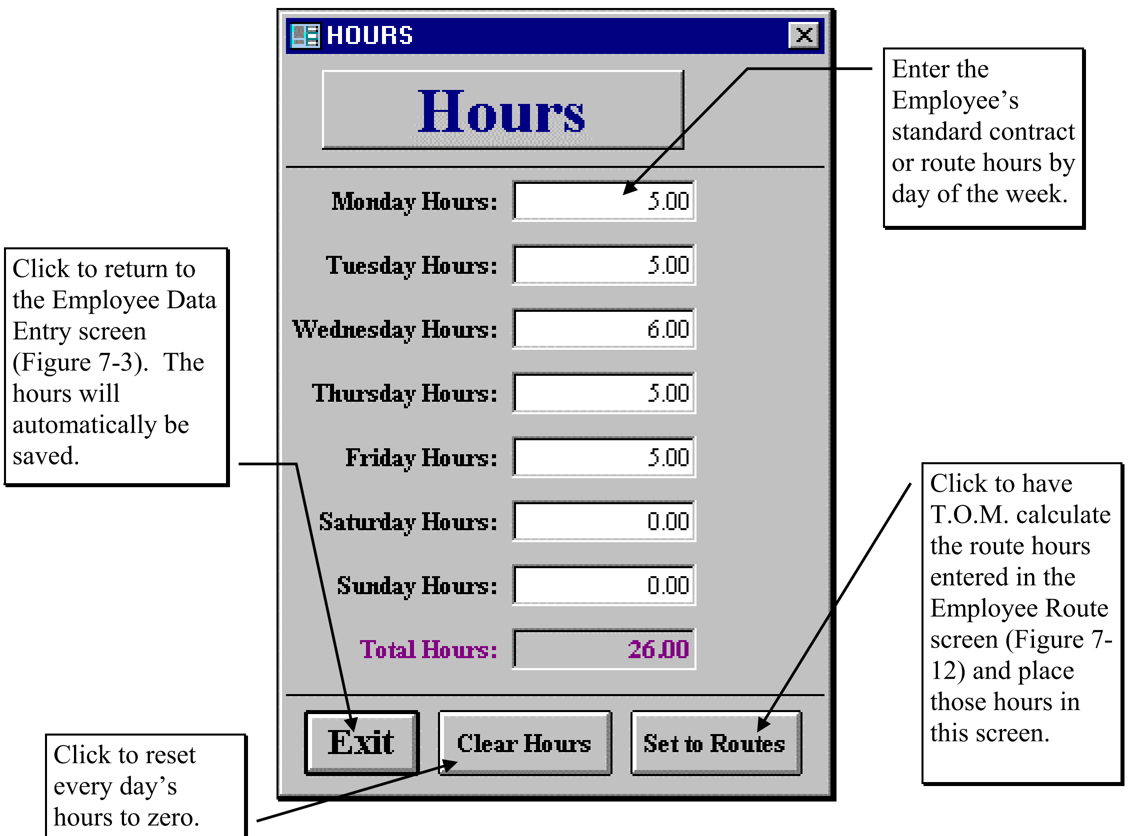


Figure 7-7. The Employee Hours Screen

Finally, if this employee is a driver or driver's aid T.O.M. allows you to enter that employee's actual route times for the week (this is discussed further in this chapter). If you have entered an employee's route times T.O.M. will, if you desire, automatically calculate the number of hours in each day that the employee's routes take to perform and enter those hours in this screen. To have T.O.M. calculate these hours you would click the Set To Routes button. This will instruct T.O.M. to erase any existing hours in this screen and replace those hours with the hours that T.O.M. calculates from the route times that you have entered. For more information about entering an employee's route times see the section marked Entering An Employee's Route Times later in this chapter.

Working with Employee Schedules

When telling T.O.M. how to automatically assign employees and vehicles to your field trips you can setup lists of employees and vehicles called schedules. You create the schedules (see the section titled *Schedules* in *Chapter 3 - Entering Lookup Lists* in this manual). You can create as many schedules as you like. Employees can be on as many or as few schedules as you like. When you enter a new field trip you will tell T.O.M. which schedule or schedules to use when assigning drivers to this field trip.

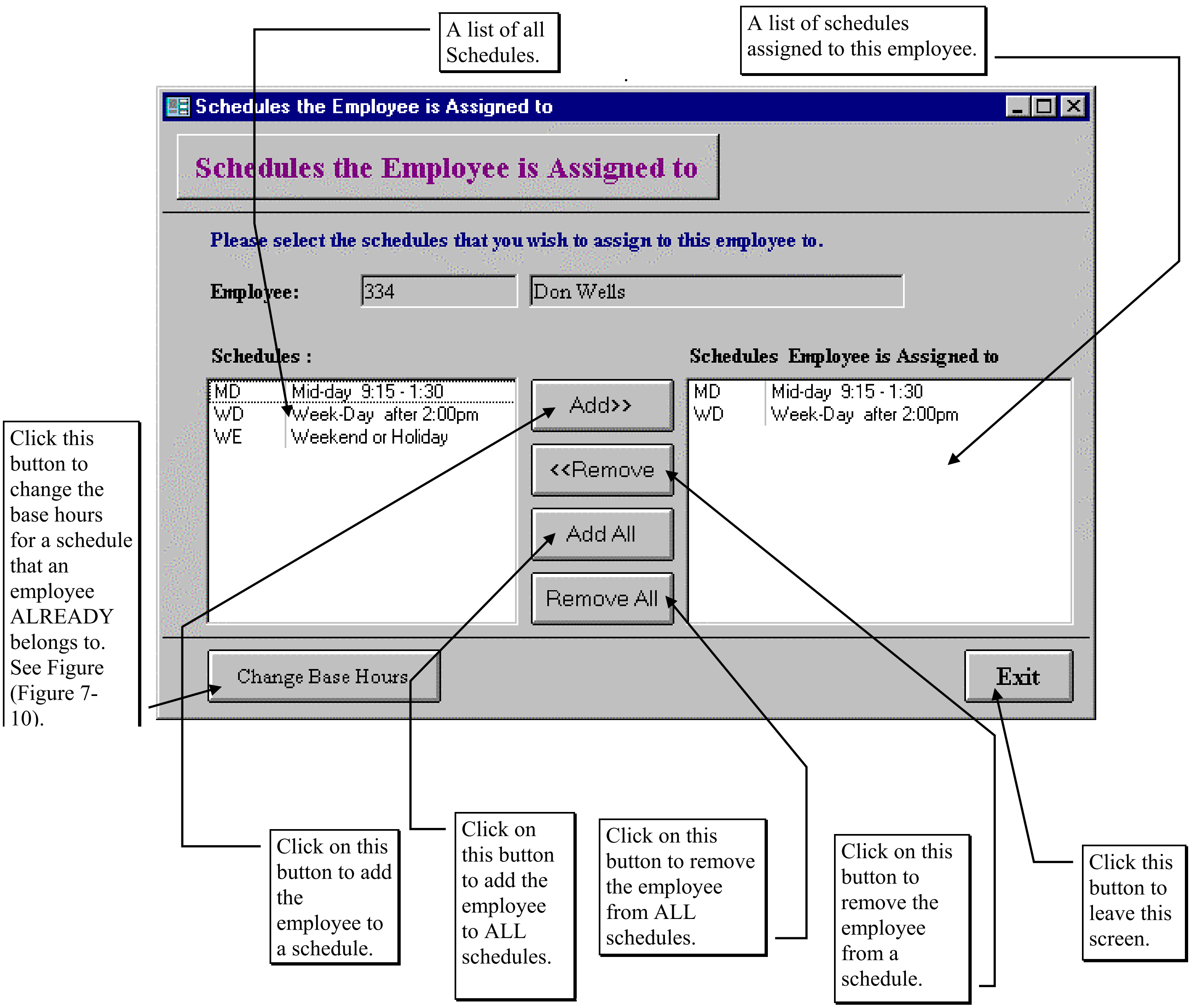


Figure 7-8. The Add / Remove Employees To Schedule Screen

While entering the employee information you may also establish in which schedules that employee will belong. **NOTE:** IN ORDER TO ENSURE THAT T.O.M. AUTOMATICALLY ASSIGNS DRIVERS TO FIELD TRIPS CORRECTLY, YOU MUST PROPERLY ESTABLISH TO WHICH SCHEDULE(S)

EACH EMPLOYEE BELONGS. You can view what schedules an employee belongs in as well as add or remove schedules that an employee belongs in by clicking the Schedule button which displays the Add / Remove Employees From Schedule screen (Figure 7-8).

It is important that you understand how schedules are setup and how they work with the automatic assignment function. Please take time to read **Appendix A - Schedules - Setting Them Up & How they Affect Automatic Assignment.**

This screen displays all of the schedules that the employee is currently assigned to. From here you may add the employee to the list of a schedule, add the employee to the list of every schedule, delete an employee from a schedule list, delete the employee from the list of every schedule or change the base hours for an employee for a schedule that he / she ALREADY belongs to.

Deleting the Employee from a Schedule's List

To remove the employee from a schedule, simply position your cursor on the line of the schedule in the list of schedules that the employee already belongs you wish to delete and click the <<Remove button. When you do this (or click on the Remove All button) T.O.M. displays a message box informing you that when T.O.M. will not only remove this employee but will also remove any unreplaced cancellations and makeups for the employee if T.O.M. finds the employee has any unreplaced cancellations or makeups (Figure 7-9). **This is important to note because after you remove and employee from a schedule he / she looses all unreplaced cancellations and makeups. Even if you add that employee back to the schedule those cancellations and makeups will not be revised as unreplaced**.

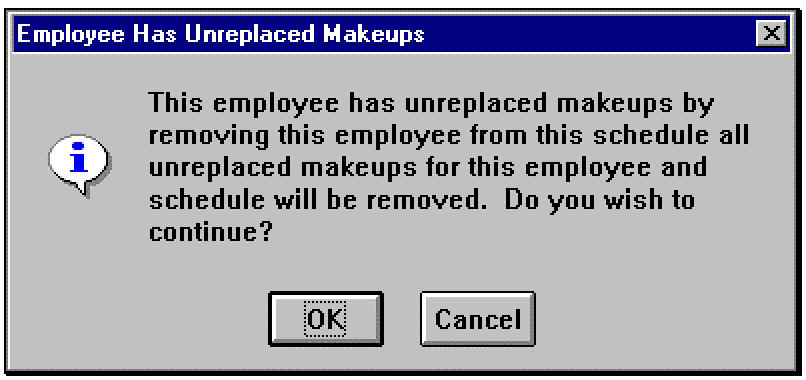


Figure 7-9. T.O.M. Warning When You Remove an Employee From A Schedule

Adding an Employee to the List of a Schedule

To add an employee to the list of a schedules of all schedules and click the Add>> button which will cause the selected schedule to appear in the list of schedules that the employee belongs. You may also click the Add All button and all of the schedules in the list of all schedules will also appear in the list of schedules that the employee belongs to.

Changing the Base Hours for an Employee Schedule

To enter a base hours for an employee / schedule click on one of the schedules in the list of schedules that the employee belongs to and then click the Change Base Hours button. This will cause the Change Employee / Schedule Base Hours screen to display (Figure 7-10).

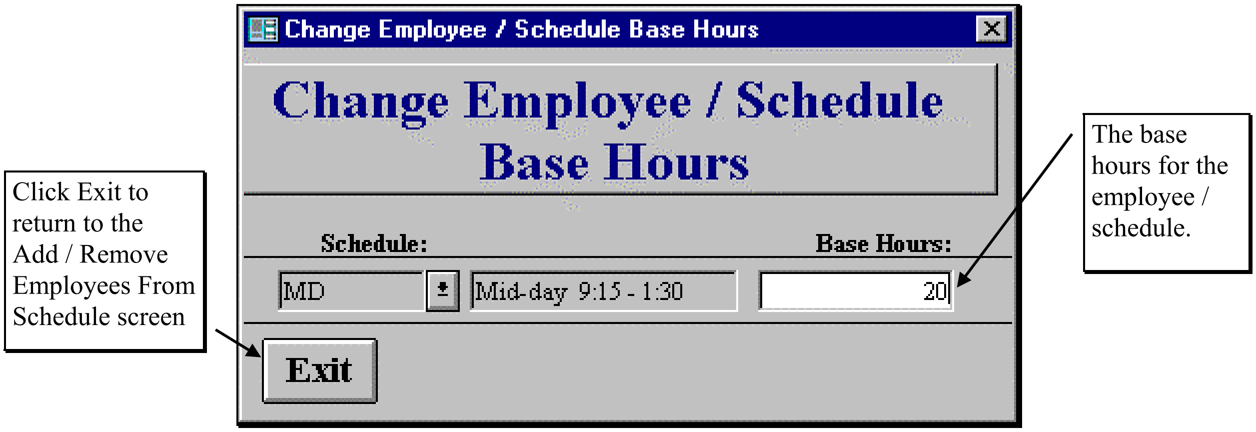


Figure 7-10. The Change Employee / Schedule Base Hours Screen

You will only use this field if your district has chosen to have T.O.M. automatically assign drivers to field trips using the Hours Averaging method. Many times in a year the district will hire a new employee or will allow an employee that previously didn't drive field trips to drive them. Or a driver may be sick and not be able to perform field trips for an extended period of time like a month. In any of these cases you then are faced with a situation of a driver being added to a list of drivers that has far less (if any) field trip hours than the other drivers on the list. If this situation were left alone T.O.M. would then heavily favor this new driver with field trip assignments for an extended period of time to bring that new driver's hours in line with the other drivers on the driver list (schedule).

Most districts would find that unacceptable. To deal with this situation T.O.M. allows you to enter an amount of hours called *Base Hours* in the employee screen (Figure 7-3) that will be added to each driver's total field trip hours when T.O.M. recalculates a drivers field trip hours. Thus, when you add a new driver to a driver list you can simply determine the average hours of the other drivers and enter that average into the new driver's base hours and that new driver will be on equal footing with the other drivers in the driver list (schedule).

NOTE: T.O.M. provides you with an excellent report that will give you the average hours of all employees in a schedule or all employees in total. This report is called the Driver / Schedule Field Trip Hours Report. To learn more about this report see *Chapter 7 - Management Reports* in the *T.O.M. User Guide*.

If your district choses to average hours WITHIN each schedule then you will not use the *Base Hours* field found in the employee screen. Rather, you will use the *Base Hours* field found in the Employee Schedule record. To enter a base hours for an employee / schedule click on the one of the schedules in the list of schedules that the employee belongs to and then click the Change Base Hours button.

Viewing the Employee's Assignment Activity Log

T.O.M. automatically will record all activity pertaining to employee and vehicle field trip assignment to T.O.M.'s Assignment Activity Log. You may view all the records in this log that pertain to the specific employee that you are working with by clicking the Log button on the Employee Data Entry screen (Figure 7-2). When you do this the Assignment Activity Log Inquiry screen displays (Figure 7-11) showing all records in the log that pertain to the specific employee. From here you may further restrict the records that you wish to view by entering search parameters such as a log date range or source routine. For more information about the Assignment Activity Log and the Assignment Activity Log Inquiry see *Chapter 11 - Assignment Activity Log* in the *T.O.M. User Guide*.

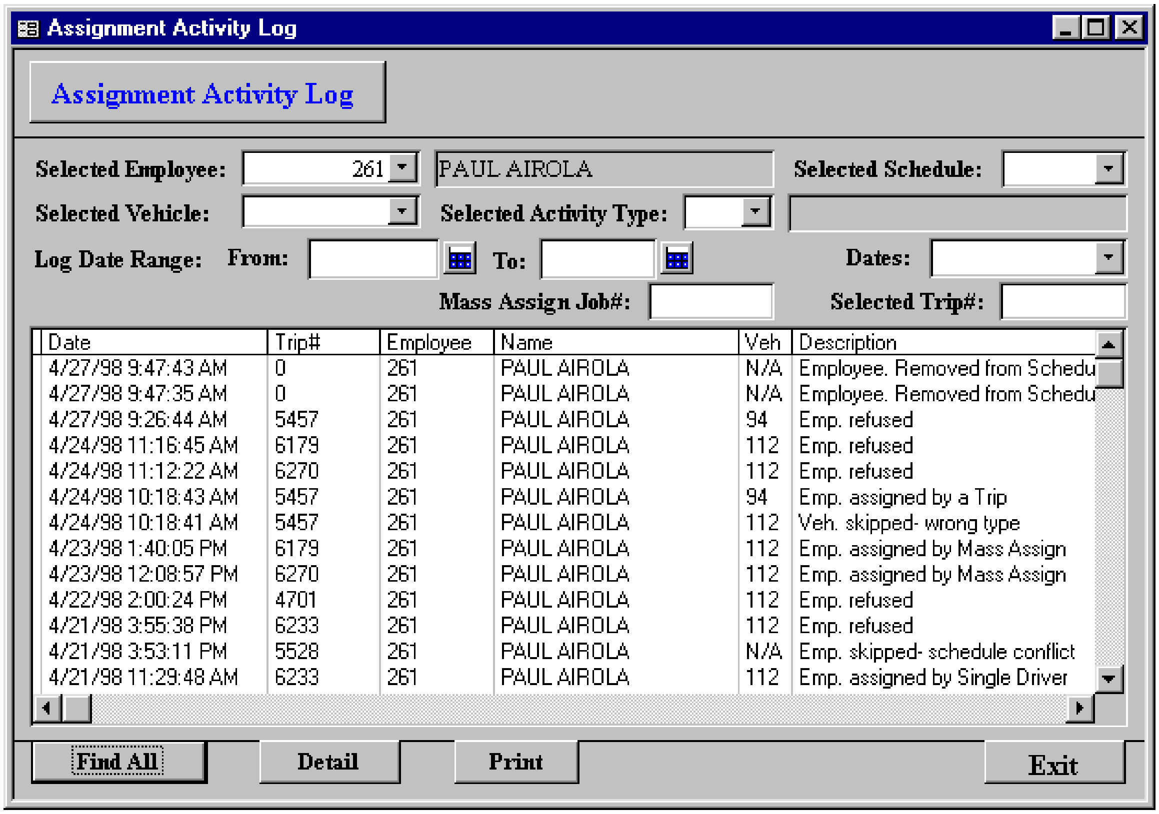


Figure 7-11. The Assignment Activity Log Inquiry Screen Showing Activity for an Employee

Working with Employee Routes

T.O.M. allows you to enter an employee's daily route times. These route times can be used for informational reporting purposes. These route times can also be considered by T.O.M. when automatically assigning drivers to field trips. T.O.M. can use assign field trips *around* these route times ensuring that the driver will get no field trip assignment that will conflict with that route that the employee drives. T.O.M. can also consider route times that overlap with field trip assignment when precluding overtime. To learn more about how T.O.M. can use employee routes when automatically assigning drivers to field trips see *Employee Route Hours* in the section *The Assignment Section* in *Chapter 4 - District Options* in this manual.

When you click the Routes button in the Employee Data Entry screen (Figure 7-3) the Employee Routes screen displays (Figure 7-12). This screen displays all of the route times that you have created for this employee in T.O.M. From here you may add a new route, change an existing route, delete an existing route or copy a route to another day. The following is a detailed discussion of each of these functions.

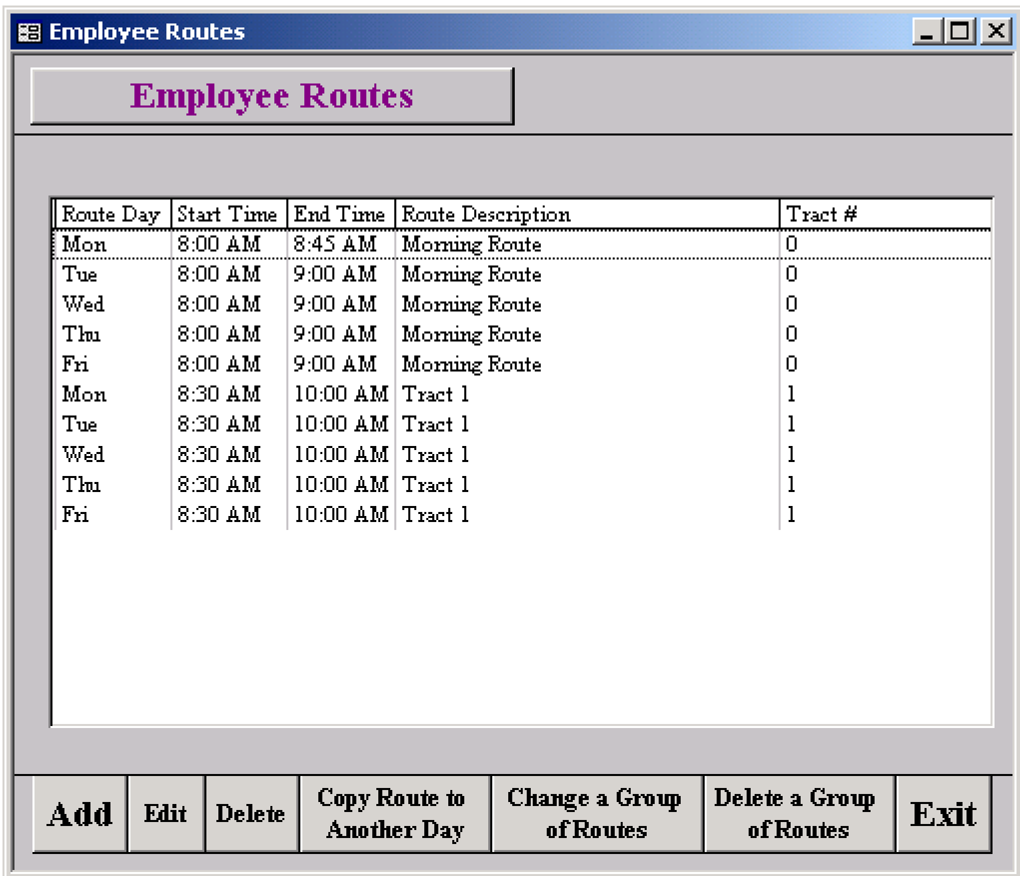
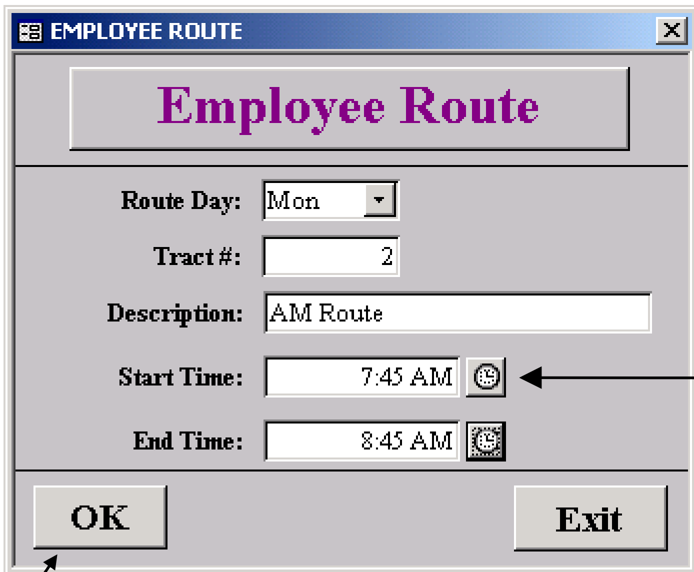


Figure 7-12. The Employee Routes Screen

Adding a New Employee Route

To add a new route time for an employee click the Add button in the Employee Route screen (Figure 7-12). This will cause the Employee Route Data Entry screen to display (Figure 7-13). This screen allows you to enter in all of the pertinent information concerning an employee route. To save the employee route information that you have entered click the OK button. To exit this screen without saving the employee route information you have entered click the Exit button. The following is a detailed discussion of each field available to you in this screen. See *Employee Route Data Entry Screen Options* below for a complete description of the data entry fields and options.



Click to save employee / route information and return to the employee screen.

Click the Clock Button for a pop up Time Clock entry screen for easy entry of a time. (See Appendix C – 'Using the Pop Up Calendar and Time Entry Screens' in this book.)

Figure 7-13. The Employee Route Data Entry Screen

Changing an Existing Employee Route

If you wish to change an existing Employee Route, then select a route on the Employee Route screen (Figure 7-12) by clicking on the row containing the desired route and then click the Edit button. You will be taken to the Employee Route Data Entry screen (Figure 7-13). This screen will let you change any of the Employee Route information. To save the Employee Route information you have changed, click the OK button. To exit this screen without saving the information you have entered click the Exit button. See *Employee Route Data Entry Screen Options* below for a complete description of the data entry fields and options.

Deleting an Existing Employee Route

If you wish to remove an existing employee route then select a route on the Employee Route screen (Figure 7-12) by clicking the row containing the desired route and then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this route. If you do confirm to T.O.M. that you want to delete the route, T.O.M. will remove the route from your T.O.M. database.

Employee Route Data Entry Screen Options

The following describes the data entry fields and options for the Employee Route Data Entry screen (Figure 7-13).

Route Day: This is the day of the week of the route. You may enter the following values: Mon, Tue, Wed, Thu, Fri, Sat or Sun. You may also select the day from a *drop down list* by clicking on the arrow to the right of the Route Day field. You must enter a route day.

Tract #: The tract # is useful if your organization has year round classes where depending upon the time of year the route times will change. The tract # is also useful if your organization has regular early dismissal – such as every Thursday class is released at 1:00PM rather than the usual 3:00PM. In general the tract # is a way that you can enter multiple sets of route times in for the same day and differentiate them in T.O.M.

With tract numbers you can have all your various route times in for your various times of the year. You can then tell T.O.M. which tract number T.O.M. is to use when determining if there is a conflict between a driver's route and a potential field trip assignment. You do this in the District Options section of T.O.M. *For more information on telling T.O.M. which tract number T.O.M. is to consider the current tract number see Chapter 4 – "District Options" seen earlier in this manual.*

Description: This is a 50 character field that allows you describe this particular route time.

Start Time: This is the beginning time of the route. You must enter the route start time. As with all time fields in T.O.M. the start time is entered in standard AM / PM time (not military time). T.O.M. also manages most of the formatting of the time as well. So if you are entering a start time of 8:30 AM you need only type 0830am. NOTE: If you are using the route times to have T.O.M. assign field trips around conflicting routes then make sure you put a start and end time that reflects when the driver is NOT AVAILABLE. If you enter a start time and end time that only reflects when the driver is strictly driving the route T.O.M. may assign a field trip with a departure time that is too close to the beginning or end of a route.

To make entering a time an even easier process T.O.M. also has a popup time clock screen that lets you click on the hours, minutes and AM / PM that you want and it fills in the appropriate time. To activate this popup time clock screen click on the little button next to this time field that looks like a small clock. For more information on T.O.M.'s Pop Up Time Clock screen see *Appendix C - The Pop Up Calendar and Time Entry Screens* in the *T.O.M. Getting Started Manual* for more details.

End Time: This is the ending time of the route. You must enter the route end time. As with all time fields in T.O.M. the end time is entered in standard AM / PM time (not military time). T.O.M. also manages most of the formatting of the time as well. So if you are entering a end time of 9:30 AM you need only type 0930am. NOTE: If you are using the route times to have T.O.M. assign field trips around conflicting routes then make sure you put a start and end time that reflects when the driver is NOT AVAILABLE. If you enter a start time and end time that only reflects when the driver is strictly driving the route T.O.M. may assign a field trip with a departure time that is too close to the beginning or end of a route.

To make entering a time an even easier process T.O.M. also has a popup time clock screen that lets you click on the hours, minutes and AM / PM that you want and it fills in the appropriate time. To activate this popup time clock screen click on the little button next to this time field that looks like a small clock. For more information on T.O.M.'s Pop Up Time Clock screen see *Appendix C - The Pop Up Calendar and Time Entry Screens* in the *T.O.M. Getting Started Manual* for more details.

Copying an Employee Route to Another Day

Entering the routes of every driver for every day can be a very time consuming and tedious job. Even with the quick and simple route data entry screen that T.O.M. provides this job can be quite a chore. To help speed this job along T.O.M. provides a feature that allows you to copy a route from one day of the week to some or all days of the week. This feature is very useful because many times a driver drives the same route every day of the week. With this feature you need only to enter the routes for a driver for one day and copy those routes to the other days of the weeks.

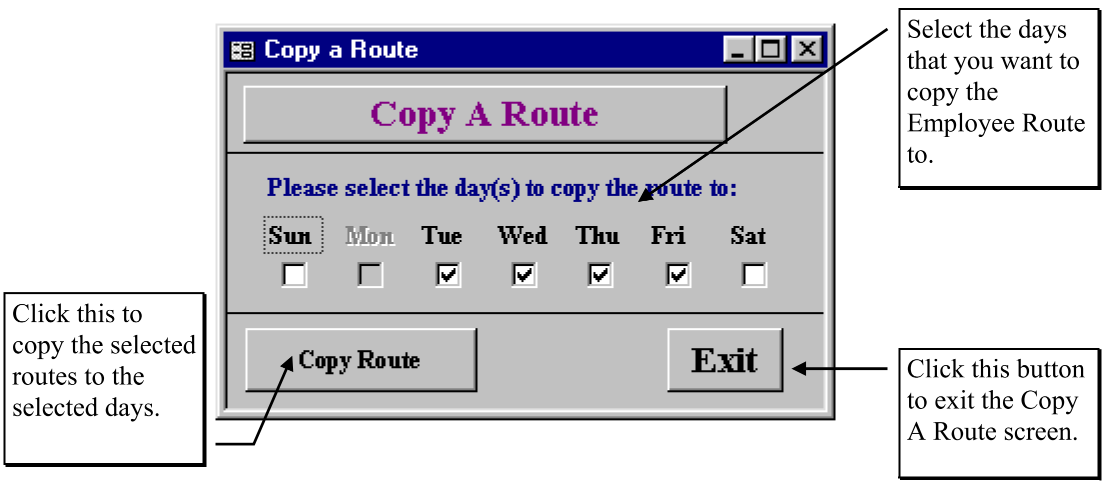
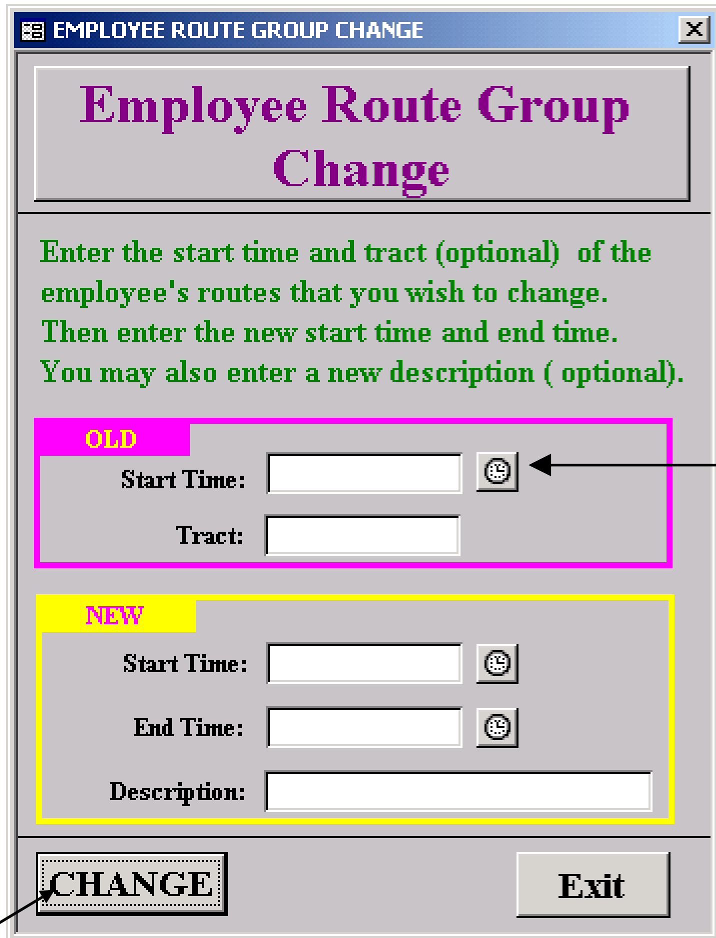


Figure 7-14. The Copy A Route Screen

If you wish to remove an existing employee route then select a route on the Employee Route screen (Figure 7-12) by clicking the row containing the desired route and then click the Copy Route To Another Day button. This causes the Copy A Route screen to display (Figure 7-14). This screen asks you which days of the week to copy the route information to. Just click on each day that you want to copy the route information to and then click the Copy Route button. T.O.M. will create Employee Routes for each selected day using the information from the original Employee Route you selected to copy. You will then be returned to the Employee Route screen (Figure 7-12).

Changing a Group of Employee Routes

This feature allows you to change the start time, end time and perhaps the description of all an employee's routes that start with a specified start time. To change route information for a group of employees click the Change a Group of Routes button in the Employee Route screen (Figure 7-12). This will cause the Employee Route Group Change screen to display (Figure 7-13). This screen allows you to enter the start time you wish to change and then enter new start and ending times. You can also change the description. To make the change, click the Change button. To exit this screen without making the change, click the Exit button. The following is a detailed discussion of each field available to you in this screen.



Click the Clock Button for a pop up Time Clock entry screen for easy entry of a time. (See Appendix C – 'Using the Pop Up Calendar and Time Entry Screens' in this book.)

Click to make the changes you have entered for the entire employee group.

Figure 7-15. The Employee Route Group Change Screen

Old Start Time: This is the existing beginning time of the route for the group of routes you wish to change. As with all time fields in T.O.M. the start time is entered in standard AM / PM time (not military time). T.O.M. also manages most of the formatting of the time as well. So if you are entering a start time of 8:30 AM you need only type 0830am. You must enter an old start time. T.O.M. offers you and easy way to enter any time by using your mouse. Just click on the button with a picture of a clock in it next to the time field and a pop up time clock time entry screen will appear allowing you an easy way to enter a time using your mouse. See Appendix C - The Popup Calendar and Time Clock Screens in this book for more information

Old Tract #: This is the tract # of the group of routes you wish to change. If this number is entered T.O.M. will select all routes that contain this tract number to make the group change you are requesting.

New Start Time: This is the new beginning time of the route for the group of routes you wish to change. As with all time fields in T.O.M. the start time is entered in standard AM / PM time (not military time). T.O.M. also manages most of the formatting of the time as well. So if you are entering a start time of 8:30 AM you need only type 0830am. You must enter a new start time.

To make entering a time an even easier process T.O.M. also has a popup time clock screen that lets you click on the hours, minutes and AM / PM that you want and it fills in the appropriate time. To activate this popup time clock screen click on the little button next to this time field that looks like a small clock. For more information on T.O.M.'s Pop Up Time Clock screen see *Appendix C - The Pop Up Calendar and Time Entry Screens* in the *T.O.M. Getting Started Manual* for more details.

New End Time: This is the new ending time of the route for the group of routes you wish to change. You must enter the route start time. As with all time fields in T.O.M. the end time is entered in standard AM / PM time (not military time). T.O.M. also manages most of the formatting of the time as well. So if you are entering a end time of 9:30 AM you need only type 0930am. You must enter a new end time.

To make entering a time an even easier process T.O.M. also has a popup time clock screen that lets you click on the hours, minutes and AM / PM that you want and it fills in the appropriate time. To activate this popup time clock screen click on the little button next to this time field that looks like a small clock. For more information on T.O.M.'s Pop Up Time Clock screen see *Appendix C - The Pop Up Calendar and Time Entry Screens* in the *T.O.M. Getting Started Manual* for more details.

Description: This is a 50 character field that allows you describe this particular route time for the group of routes you wish to change. The description field is optional.

Deleting a Group of Routes

To delete a group of employees with a specific start time and/or day click the Delete a Group of Routes button in the Employee Route screen (Figure 7-12). This will cause the Employee Route Group Change screen to display (Figure 7-13). This screen allows you to enter either the start time and/or route day of the group of employees you wish to delete. To delete the group, click the Delete button. To exit this screen without making the change, click the Exit button. The following is a detailed discussion of each field available to you in this screen.

Click to delete the employee's routes you wish to delete according to the start time and route day you entered.

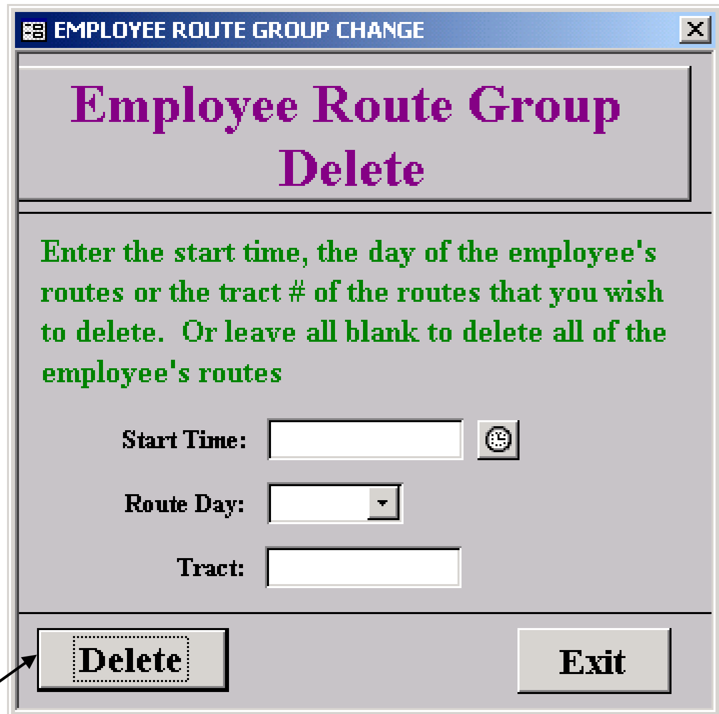


Figure 7-16. The Employee Route Group Delete Screen

Start Time: This is the existing beginning time of the route for the group of employee's you wish to delete. As with all time fields in T.O.M. the start time is entered in standard AM / PM time (not military time). T.O.M. also manages most of the formatting of the time as well. So if you are entering a start time of 8:30 AM you need only type 0830am.

To make entering a time an even easier process T.O.M. also has a popup time clock screen that lets you click on the hours, minutes and AM / PM that you want and it fills in the appropriate time. To activate this popup time clock screen click on the little button next to this time field that looks like a small clock. For more information on T.O.M.'s Pop Up Time Clock screen see *Appendix C - The Pop Up Calendar and Time Entry Screens* in the *T.O.M. Getting Started Manual* for more details.

Route Day: This is the new beginning time of the route for the group of employees you wish to delete. As with all time fields in T.O.M. the start time is entered in standard AM / PM time (not military time). T.O.M. also manages most of the formatting of the time as well. So if you are entering a start time of 8:30 AM you need only type 0830am.

Tract: This is the number of the tract of the group of employee routes you wish to select to be deleted. If you enter a number here T.O.M. will select all of the employee routes that contain this tract number and also match the selected Start Time and / or Route Day (if any are entered) and remove them.

Working with Employee Characteristics

This is an optional feature of T.O.M. that you do not have to use. Characteristics act like filters in the automatic assignment of drivers to field trips process. You may enter a trip and tell T.O.M. when automatically assigning drivers to that trip only select drivers with a certain set of characteristics. T.O.M. will then ensure that any driver that is automatically assigned to that trip has all of the characteristics that you specified. Here is where you specify what particular characteristics a driver has.

When telling T.O.M. how to automatically assign employees and vehicles to your field trips you can setup employee characteristics. You create the characteristics before assigning them to drivers (see *Characteristics* in *Chapter 3 - Entering Lookup Lists* in this manual). You can create as many characteristics as you like. A characteristic can be assigned to as many employees as you like.

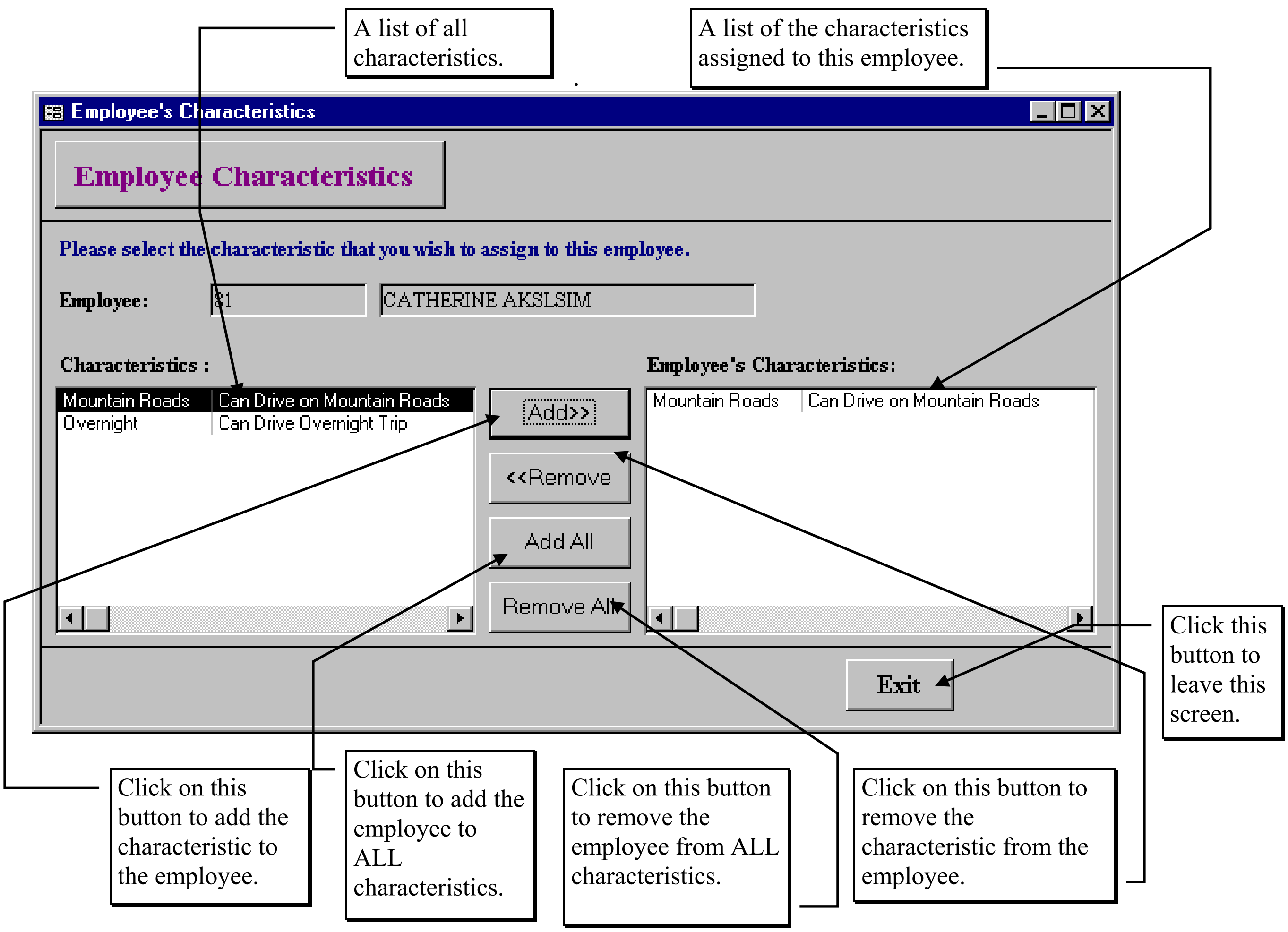


Figure 7-17. The Employee Characteristics Screen

This screen displays two windows, or “panes”. In the left pane, you’ll see all of the characteristics you have created. In the right pane, you’ll see the characteristics already assigned for this employee. From here you may assign an individually selected characteristic to the list of employee’s characteristics, assign all the characteristics to the list of employee’s characteristics, remove a characteristic from the list of employee’s characteristics or remove all the characteristics from the list of employee’s characteristics.

Adding Characteristics to the Employee’s List of Characteristics

To assign a characteristic to an employee’s list of characteristics click on the desired characteristic in the left pane and then click the Add>> button which will cause the selected characteristic in the left pane to be added to the list of employee’s characteristics in the right pane. You may also click the Add All button and all of the characteristics in the left pane will be added to the list of employee’s characteristics in the right pane.

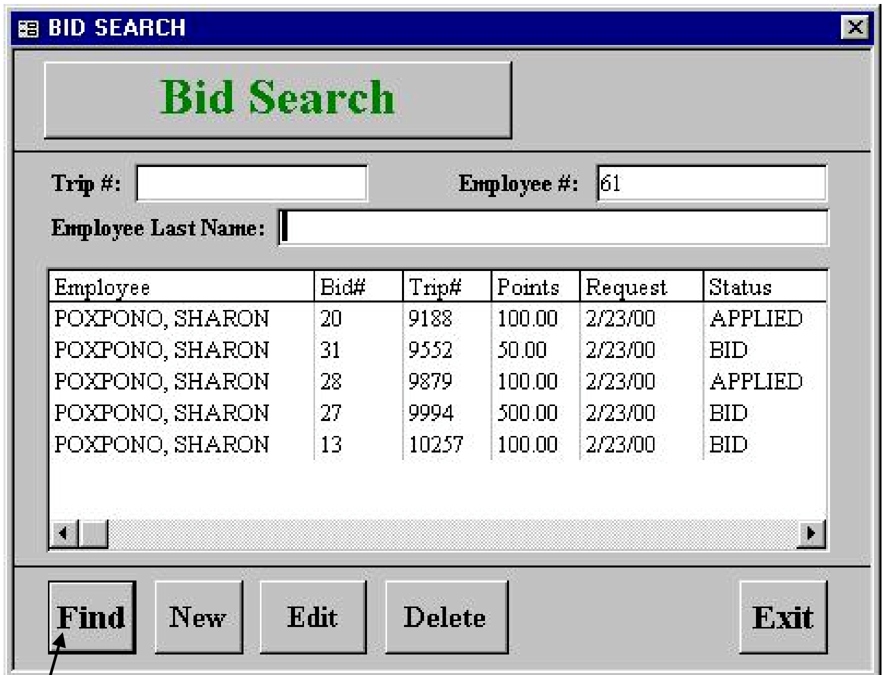
Deleting Characteristics from the Employee’s List of Characteristics

To delete a characteristic from an employee’s list of characteristics click on the desired characteristic in the right pane and then click the <<Remove button which will cause the selected characteristic in the right pane to be deleted from the list of employee’s characteristics and will again appear in the list in the left pane. You may also click the Remove All button to delete all of the characteristics from the list of employee’s characteristics in the right pane.

Working with Field Trip Bids

NOTE: Disregard this section if you have not selected the Bid Allowance Method of Automatic Assignment in your Assignment Section of your District Options Screen.

Figure 7-18 shows a list of all bids for field trip assignment that this employee has made. From here you may add new bids for an employee or work with the employee's existing bids.



Click to list the field trip bids that match the search criteria you have entered in this screen.

Figure 7-18. The Bid Search Screen

Finding an Employee

The Bid Search screen also offers you a very simple way to search trip bids by trip #, employee name or employee # and edit them or add new trip bids or delete existing trip bids. This screen is displayed when you click the Trip Bids button on the Employee Data Entry screen (Figure 7-3). **NOTE:** The Trip Bids screen is only visible if you have selected Automatic Assignment Method of Bid Allowance in district options. In the Assignment Section of District Options Screen (Chapter 4 of this book).

Simply type in trip #, all or part of the Employee's name or employee # and then click the FIND button. After a moment a list of bids that match your criteria, if any, will appear in a list below the search criteria. If you wish to change the search criteria, key over the last search criteria that you entered and then click the FIND button again and the system will refresh the list of found bids automatically. Once you have spotted the bid you desire, simply point to that bid and click it and click the Edit button and you will be taken to the Field Trip Bid screen (Figure 7-19) with selected bid displayed on the screen.

Adding a New Field Trip Bid

If you wish to add a new field trip bid, click the New button and you will be taken to the Field Trip Bid screen (Figure 7-19). This screen will let you enter all of the field trip bid information. To save the field trip bid information you have entered, click the OK button. To exit this screen without saving the information you have entered, click the Exit button. See *Field Trip Bid Screen Options* below for a complete description of the data entry fields and options.

Click the Employee button to display screen to alphabetically search for employees (Figure 7-2).

Figure 7-19. The Field Trip Bid Data Entry Screen

Changing an Existing Field Trip Bid

If you wish to edit an existing field trip bid, highlight the desired bid and click the Edit button and you will be taken to the Field Trip Bid screen (Figure 7-19). This screen will let you change the field trip bid information, unless it is a display only field (gray background). To save the revised field trip bid information you have entered, click the OK button. To exit this screen without saving the revised information you have entered, click the Exit button. See *Field Trip Bid Screen Options* below for a complete description of the data entry fields and options.

NOTE: T.O.M. won't let you Edit a bid if the bid has been accepted and the driver has already been assigned to the field trip.

Deleting an Existing Field Trip Bid

When you click on the Delete command buttons in the Trip Bids screen you will delete the bid – UNLESS it has been accepted on a field trip assignment – then you can't delete it.

Field Trip Bid Screen Options

The following describes the data entry fields and options for the Field Trip Bid Data Entry screen (Figure 7-19).

Trip Num.: This is the number of the field trip that the bid is for as shown in the BID # field.

Bid #: This field is a display only field. This is the number of the bid assigned automatically or manually when the bid was created.

Customer: This field is a display only field. This is the customer name assigned to the selected field trip.

Destination: This field is a display only field. This is the field trip destination.

Departure: This field is a display only field. This is the field trip departure date

Purpose: This field is a display only field. This is the purpose of the field trip.

Employee #: This is the employee's number for the employee placing the bid.

Employee Name: This is the employee's name for the employee placing the bid.

Bid Amount: This is the amount of the bid, which can be any amount, including an amount greater than the employee's bid allowance.

Request Date: This is the date of the bid.