

Chapter 12

Things That You May Want to Do At the End of Year

T.O.M. doesn't really have any year end procedures. There is nothing wrong with using T.O.M. without changing anything or removing old field trips from T.O.M.'s database. After all, all of T.O.M.'s management reports are driven by date ranges that you enter and processes like Mass Assign ask you to enter a date as well. Many districts using the T.O.M. software keep several years of historical data in the T.O.M. database. It's then very convenient for them to produce management reports on historical data. However, after you have used the T.O.M. software for a while you may want to clear out old information or clean up some of your T.O.M. database. You also may want to clean up your schedules for a new year with new drivers and get rid of any old unreplaced cancellations or makeups from a prior year. T.O.M. features a couple of routines that will make these tasks simple.

In this chapter you will learn about:

- The Clear Schedule Routine
- Resetting the Rotation Order of a Schedule.
- The Field Trip Purge Routine.
- The Field Trip Request Purge Routine.

Using the Clear Schedule Routine

Typically, after you have T.O.M. for a school year or part of a school year and you are about to begin a new school year you will want to either clean the drivers that are on your schedule list or completely rebuild them. Over the summer some drivers leave and new ones come in and you want to make sure your schedules reflect these changes.

Another consideration that you have when a new school year starts after using T.O.M. in a prior school year is that each of your schedules may have open cancellations and makeups. As you know T.O.M. remembers all driver cancellations and attempts to replace them with future field trips. T.O.M. also remembers skipped drivers and drivers that are passed with a makeup and attempts to replace them with future field trips. Most likely some of these cancellations and makeups will not be replaced by the end of a school year. You may not want T.O.M. to attempt to replace these cancellations and makeups in the new school year. You may instead prefer to have T.O.M. start with a 'clean slate' with no open cancellations and makeups.

The Clear Schedule routine was created with this purpose in mind. This routine can help you performed all of the tasks we just described. The Clear Schedule routine can perform the following tasks:

1. Clear out all unreplaced driver cancellations for a specific schedule or for all of your schedules.
2. Clear out all unreplaced driver makeups for a specific schedule or for all of your schedules.
3. Remove all drivers from a schedule(s) as well as clear out all unreplaced driver cancellations and driver makeups. This can be done for a specific schedule or for all schedules.



So at the end of a school year you may like to use the Clear Schedule routine to completely remove all of the drivers of the schedules as well as their unreplaced cancellations and refusals so that you can later rebuild the schedules fresh for the new school year. Or you may instead choose to just remove the unreplaced cancellations and makeups at the end of the year so the new school year will begin assigning straight from the schedule.

The following is a detailed example of how to run the Clear Schedules program:

1. First and most importantly make a backup of your T.O.M. database. This routine removes drivers from schedules and closes unreplaced driver cancellations and makeups permanently. It is always wise to have a backup copy of your T.O.M. database to fall back on in case you made a mistake in the way that you ran this routine.
2. Second, and also very important make sure that you are **THE ONLY PERSON USING THE T.O.M.** software. Make sure that all other users are not only NOT using T.O.M. but also are completely logged off the T.O.M. software. Running this routine while other persons are using the T.O.M. software will cause unpredictable and most likely unpleasant results.
3. From the T.O.M. Main screen open the Maintain menu, and click the Clear Schedule option (Figure 12-1).



Figure 12-1. Accessing the Clear Schedules Routine

The Clear Schedule Warning screen is displayed (Figure 12-2).



4. The Clear Schedule Warning screen reminds you to back up your data and have all your users log off the T.O.M. system before you run this routine. To continue click the OK button.

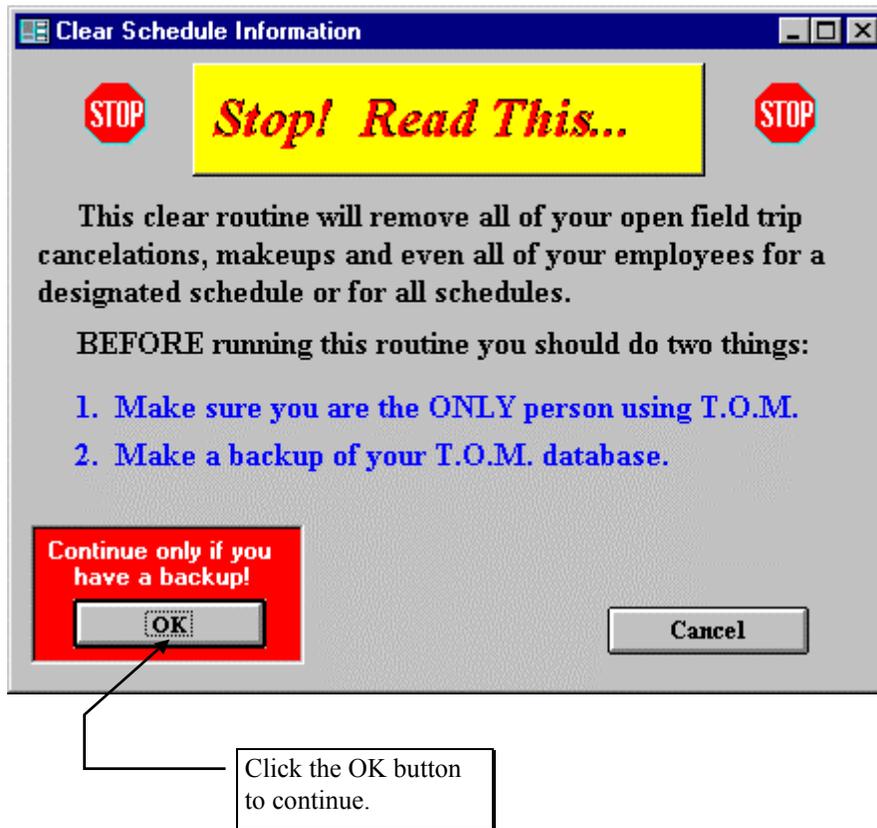


Figure 12-2. The Clear Schedule Warning Screen



- Next the Clear Schedule Screen displays (Figure 12-3). From here you specify which schedule you would like to clear and how you want to clear the schedule. If you want to clear all your schedules then leave the Schedule to Clear field blank. Once you have selected the schedule and clear option you desire click the Clear Now button. In our example we have chosen to clear the unreplaced driver cancellations for all of our schedules.

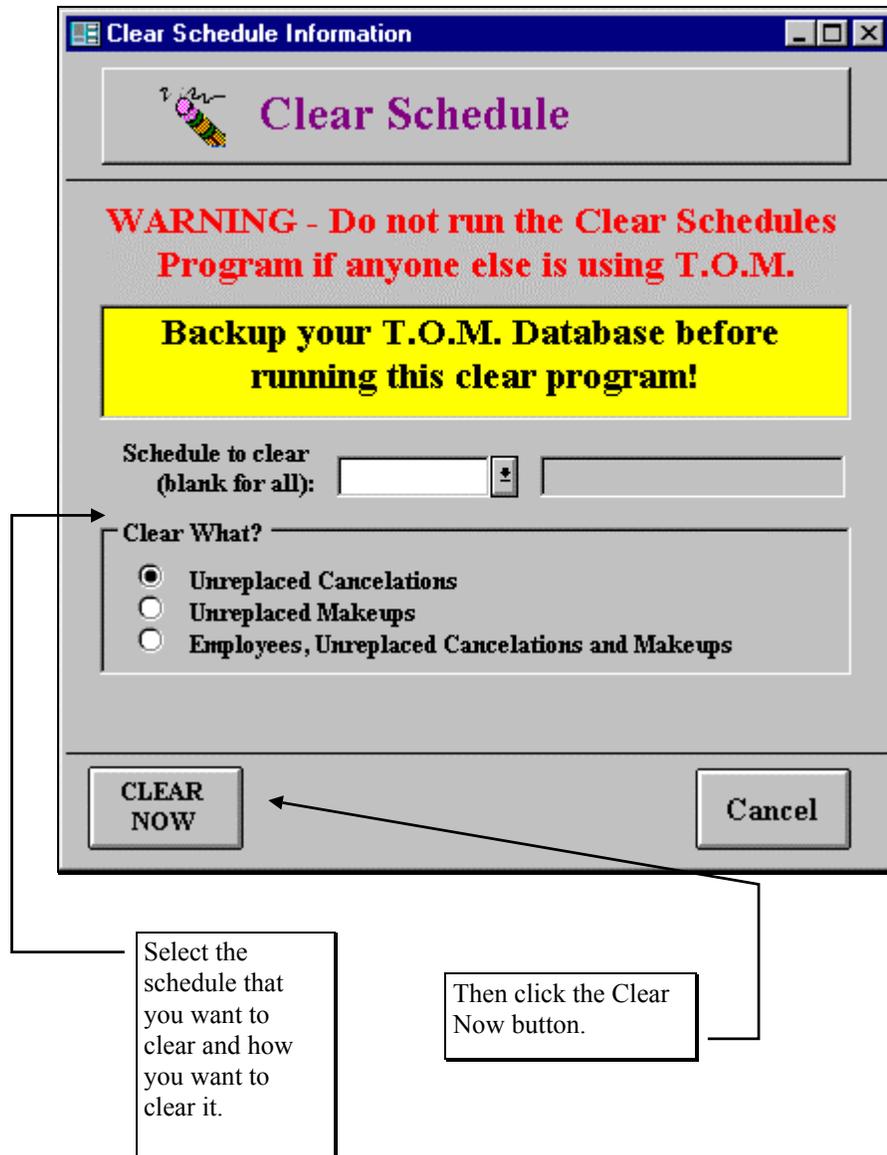


Figure 12-3. The Clear Schedule Screen



6. After a period of time (depending on the speed of your computer / network) the schedule will be cleared and the Clear Schedule Screen will display the message ‘Schedule Cleared!’ (Figure 12-4). From here you may either run the clear schedule again and clear all the unreplaced driver makeups, for example, or click the Exit button and return to the T.O.M. Main Screen (Figure 12-1).

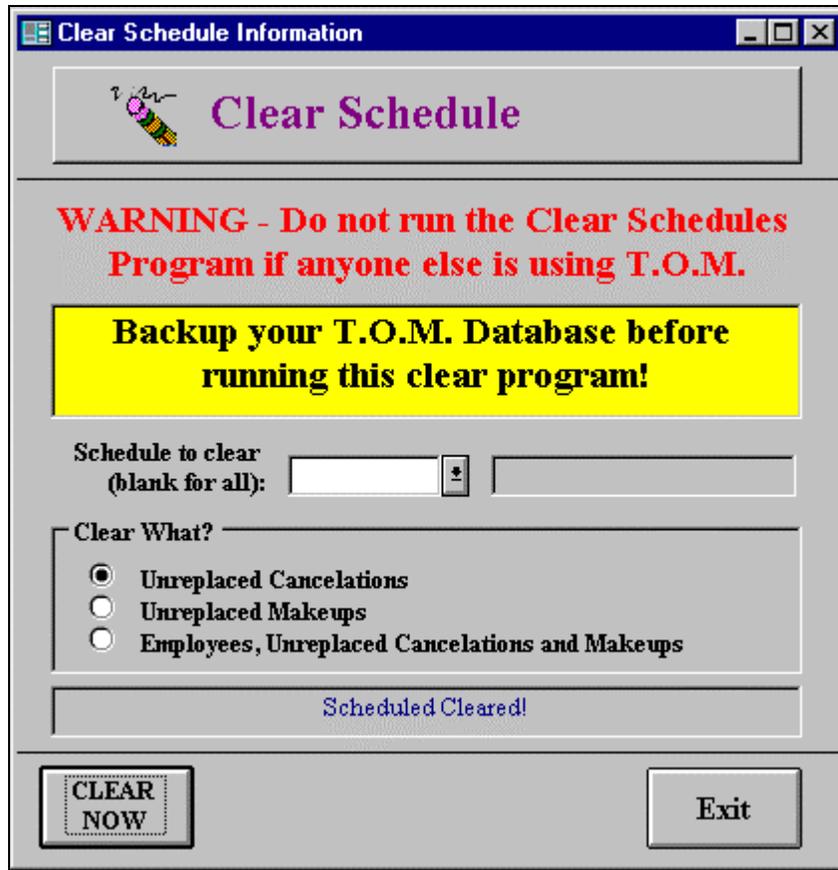


Figure 12-4. The Clear Schedule Screen AFTER the Schedule Has Been Cleared



Resetting the Rotation Order of a Schedule

(Use this feature only if your district is using the Rotation or Bid Allowance method of automatically assigning.)

When a new school year starts many districts elect to start the driver at the top of their rotation lists rather than with the driver who was due up next at the end of the prior school year. This is a simple task with T.O.M. You have two ways of performing this task with T.O.M.:

- Have the Clear Schedule routine remove all of the employees from your schedules. Then rebuild your schedules to reflect which drivers will be on the schedule for this school year. T.O.M. automatically will start the schedule with the driver at the top of the list.
 - If you choose not to have your schedules clear out then make all changes to your schedules concerning drivers that should be taken on or taken off the schedule. Then perform the steps described below.
1. From the T.O.M. Main screen open the File menu, then click the Other menu. Click the Schedule Master option (Figure 12-5). The Schedules List screen is displayed (Figure 12-6).

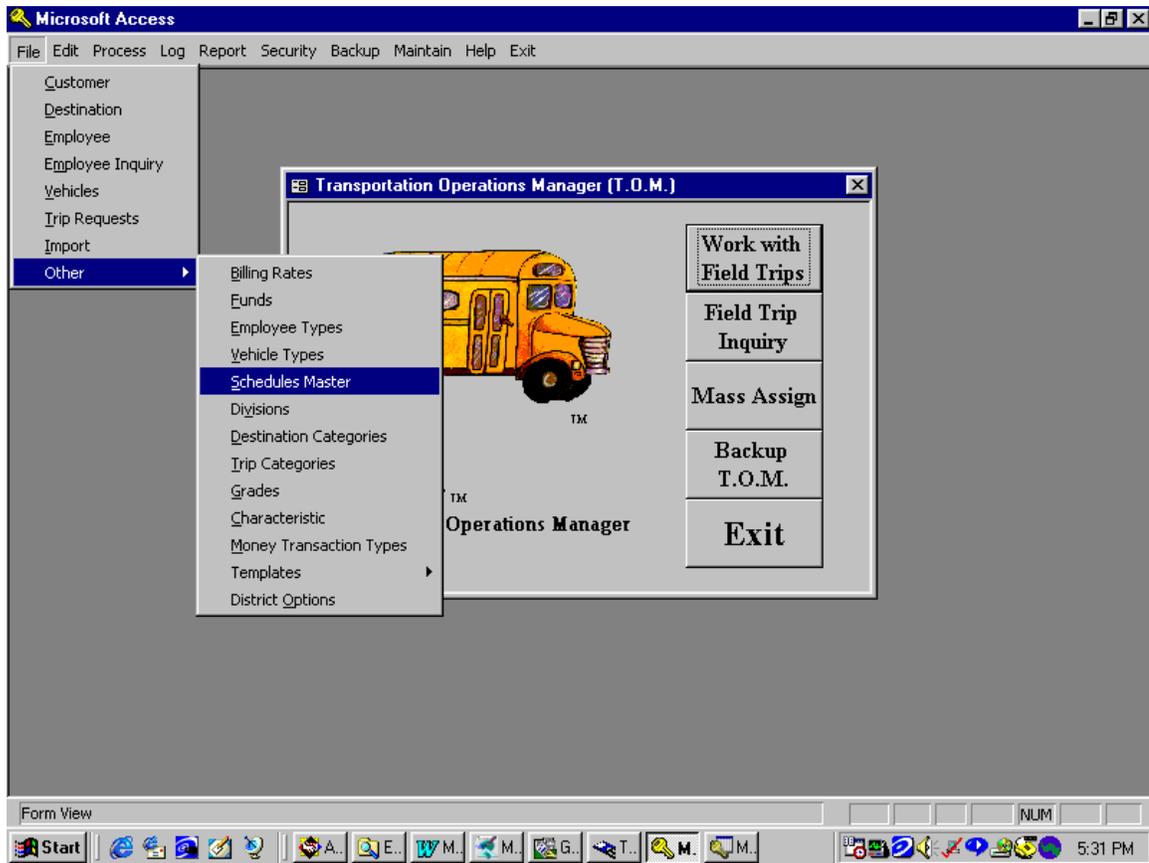


Figure 12-5. Accessing the Schedule Maintenance Program



- Click on the schedule you wish to reset and click the Edit button (Figure 12-6).

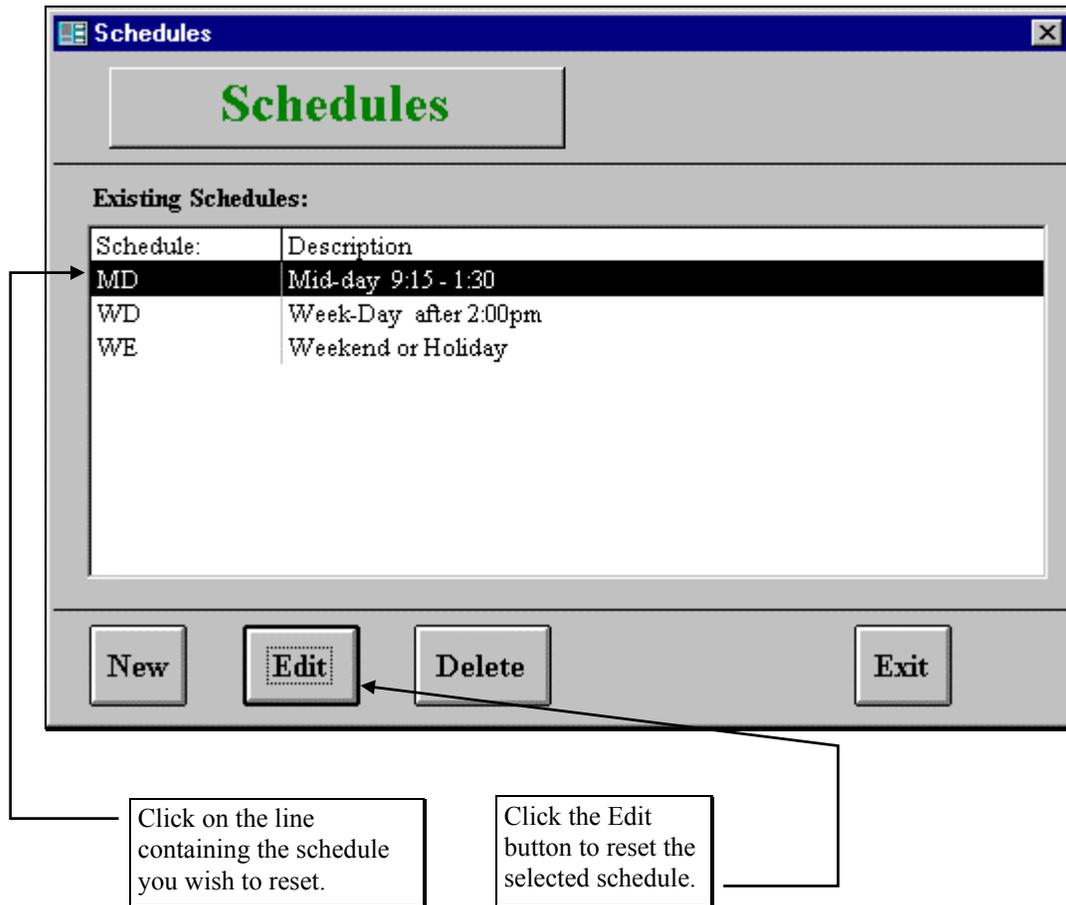


Figure 12-6. Selecting the Schedule To Reset In the Schedules List Screen

The Schedule Data Entry screen is displayed (Figure 12-7).



3. Click on the down arrow in the Next Employee # field (Figure 12-7).

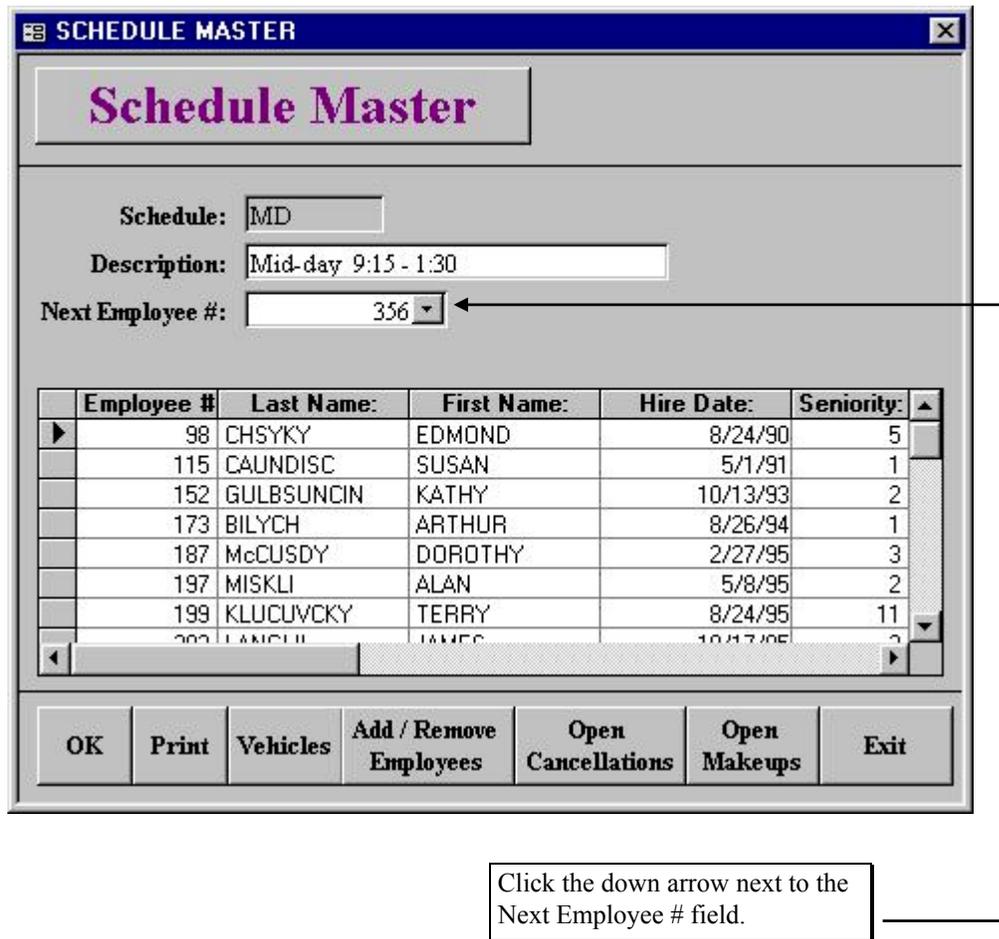


Figure 12-7. Opening the Next Employee Drop Down List In The Schedule Data Entry Screen

A drop down list containing all the employees that belong to the schedule is displayed (Figure 12-8). The drop down list is sorted in the order that you specified in your District Options. The list automatically positions itself to the current employee marked to be the next one assigned to a field trip for that schedule.



- Manually position the list to the first (top) driver on the list.

SCHEDULE MASTER

Schedule Master

Schedule: MD

Description: Mid-day 9:15 - 1:30

Next Employee #: 356

Employee #	Last Name	First Name	Hire Date	Seniority	Certification Date	License E
98.00	CHSYKY	EDMOND	8/24/90	5.00	8/30/90	3/3/99
115.00	CAUNDISC	SUSAN	5/1/91	1.00	3/27/92	2/19/01
152.00	GULBSUNCIN	KATHY	10/13/93	2.00	5/15/95	2/12/00
173.00	BILYCH	ARTHUR	8/26/94	1.00	12/20/90	4/23/99
187.00	McCUSDY	DOROTHY	2/27/95	3.00	1/20/95	9/9/99
197.00	MISKLI	ALAN	5/8/95	2.00	7/28/95	3/26/05
199.00	KLUCUWCKY	TERRY	8/24/95	11.00	7/28/95	10/15/99

Buttons: OK, Print, Vehicles, Add / Remove Employees, Open Cancellations, Open Makeups, Exit

Drop down list shows all the drivers sorted by employee number. The Next Employee # field shows the driver next to be assigned.

Position the list to the driver at the very top.

Figure 12-8. Manually Resetting The Next Driver to Be Assigned To A Field Trip To The Top Driver.



- Click the OK button (Figure 12-9).

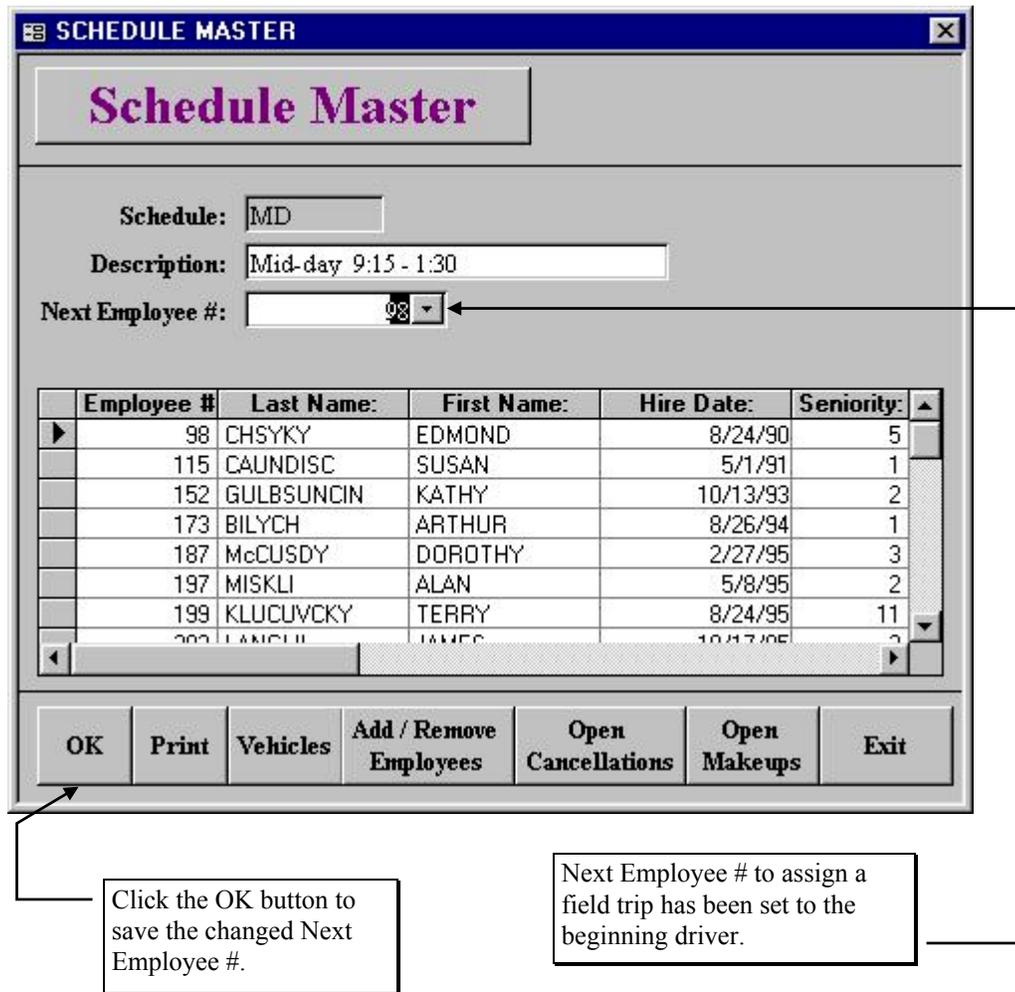


Figure 12-9. Accepting The Schedule With The Next Employee To Assign Set To The Driver at the Beginning of the List

- Repeat steps 2 through 5 for each schedule that you wish to reset. When you are finished click the Exit button on the Schedules List screen (Figure 12-6) to return to the T.O.M. Main Screen (Figure 12-1).

The Field Trip Purge Routine

After spending all the time that you have entering your field trip information the thought of then turning around and have this information removed probably makes you a little uneasy. As it should! You've invested quite a bit of time and energy to build up your T.O.M. database and there are significant advantages to leaving more than one years worth of information in your T.O.M. database. Removing your old field trip information is not something that you should do at the end of every school year. On the contrary it is something you should do only when the circumstances call for it to be done.

Sooner or later, however, it will make sense to remove your old field trip information from your T.O.M. database. The following are just a few examples of when removal of old information may be called for:



- Your T.O.M. software is running much more slowly than it has in the past. As your database becomes larger it little by little slows down the processing speed of your T.O.M. software. At what point this becomes unacceptable to you depends on your district size, your field trip activity and the speed of your computer / network.
- You want to delete a bunch of old drivers, schedules, vehicles, customers and / or destinations from your T.O.M. database. Your T.O.M. database is a true relational database. What that means to you is that it establishes relationships between your field trips and your drivers, schedules, vehicles and so on. This relational structure lends itself well to powerful reporting and inquiry.

T.O.M. will not let you remove a significant member of this relationship and therefore leave other members by themselves pointing to a missing record (or 'orphaned'). For example, T.O.M. will not allow you to delete a Driver that is assigned to field trips. If you did it would leave 'orphaned' field trips that were pointing to a driver that didn't exist any more.

The only way to delete drivers, schedules, vehicles, customers and destinations (as well as funds, billing rates and vehicle types) from your T.O.M. database after they have been assigned to at least one field trip is to remove all field trips that refer to those records. For example Paradise Valley School District has a driver Tom Burns who was assigned to dozens of field trips. In the middle of the school year Tom left the district. Even though Paradise Valley School District would like to delete Tom Burns from its database it cannot do so until all field trips that Tom Burns is assigned to are removed from the T.O.M. Database.

In the case of Tom Burns we can just mark him as inactive and he will not be assigned to any more field trips. But, at some point you may have so many inactive customers, destinations, employees and vehicles that it may justify removing your old field trip information so you can clean up these old records.

The Field Trip Purge was created for the purpose of removing old field trip information. When you run this routine you will enter a cutoff date and the Field Trip Purge routine will remove all field trip information for field trips with a departure date on or before the cutoff date. Specifically, the Field Trip Purge Routine will remove:

- Field Trips
- Field Trip Additional Dates
- Drivers and Vehicles Assigned to Selected Field Trips
- Drivers Canceled from the Selected Field Trips
- Driver Refusals for the Selected Field Trips
- Driver Passes for the Selected Field Trips
- Driver Passes with Makeups for the Selected Field Trips
- Billings, Payments and Adjustments for the Selected Field Trips.

You can see the Field Trip Purge is quite comprehensive in the removal of field trip information. The following is a detailed description of how to run the Field Trip Purge Routine:

1. First decide if there are any final management reports you wish to run on the historical field trip information before you remove it. Once you have run the Field Trip Purge Routine the only way to create these reports will be to back up your current database, restore an older backup of the database that was made before the purge and run the reports you desire.
2. Second and most importantly make a backup of your T.O.M. database. This purge routine removes the field trip information permanently. It is always wise to have a backup copy of your T.O.M.



database to fall back on in case you made a mistake in the way that you ran this routine. **NOTE:** It may be wise in fact to make two separate backup copies of your data if you are backing up to a floppy diskette. Floppy diskettes have been known to fail now and then and you wouldn't want to be put in the position of having to restore your backup only to find that the floppy diskette that you made your backup on has failed.

3. Third, also very important make sure that you are **THE ONLY PERSON USING THE T.O.M.** software. Make sure that all other users are not only **NOT** using T.O.M. but also are completely logged of the T.O.M. software. Running this routine while other persons are using the T.O.M. software will cause unpredictable and most likely unpleasant results.
4. From the T.O.M. Main screen open the Maintain menu, and click the Field Trip Purge option (Figure 12-10).

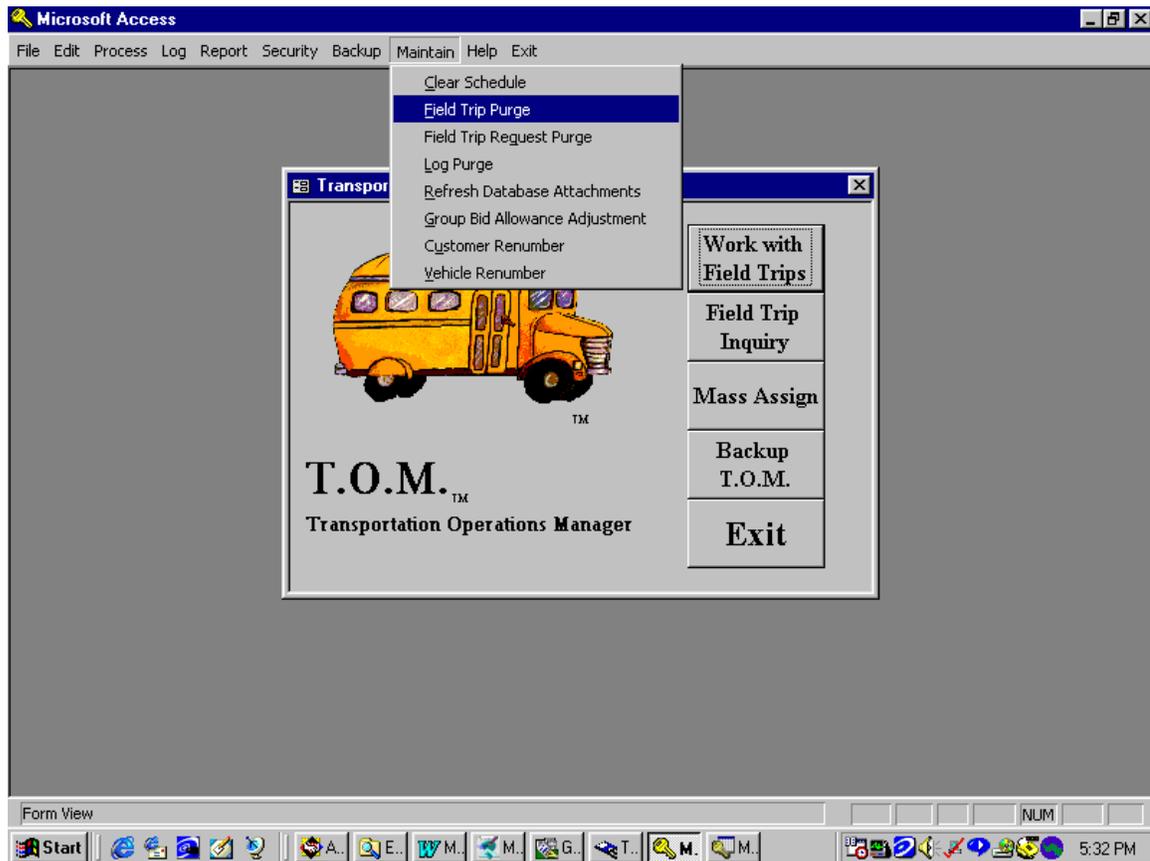


Figure 12-10. Accessing the Field Trip Purge Routine

The Field Trip Purge Warning screen is displayed (Figure 12-11).



5. The Field Trip Purge Warning screen reminds you to back up your data and have all your users log off the T.O.M. system before you run this routine. To continue click the OK button.



Figure 12-11. The Field Trip Warning Screen

The Field Trip Purge screen is displayed (Figure 12-12).



6. Enter a purge cutoff date and then click the Purge Now button. The Field Trip Purge routine will then remove all field trip information related to field trips with a departure date on or before the purge cutoff date you entered. Depending on the size of your purge file, the speed of your computer and network and the amount of information you are purging this process can take just a few seconds or quite a few minutes.

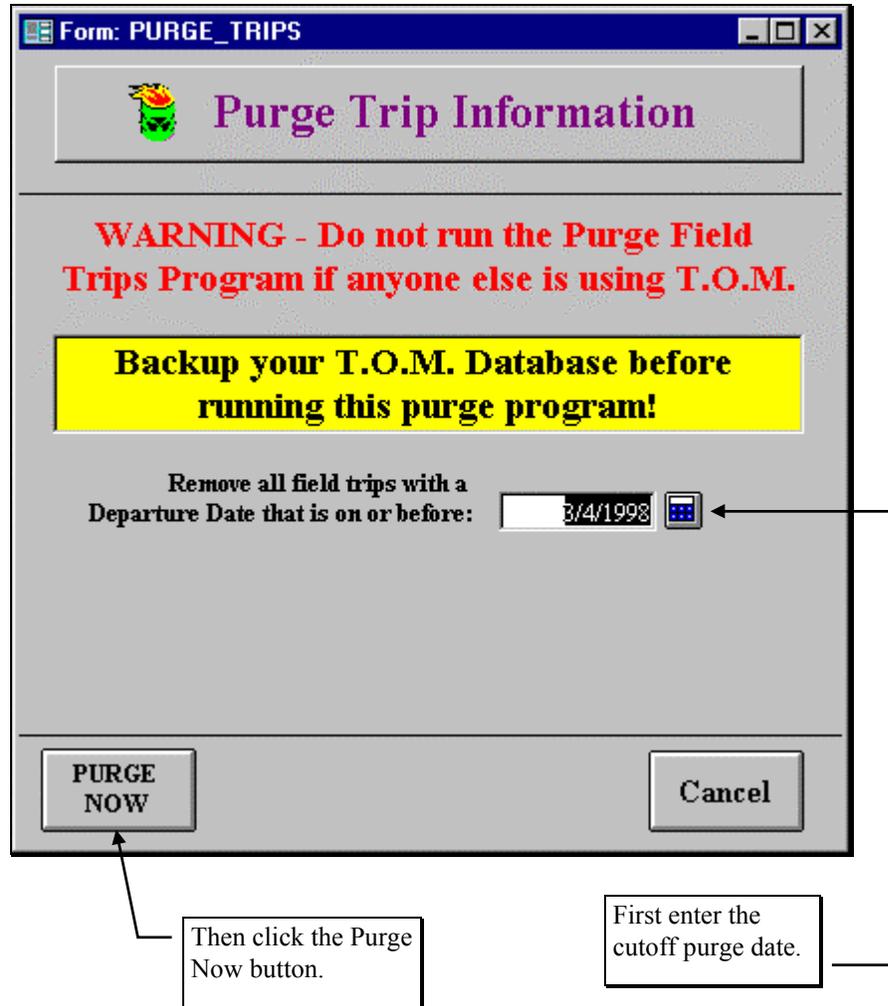


Figure 12-12. The Field Trip Purge Screen



7. When the all the related field trip information has been purged from your T.O.M. database the Field Trip Purge screen will display the message “Field Trip Compaction and Cleanup Completed” (Figure 12-13).

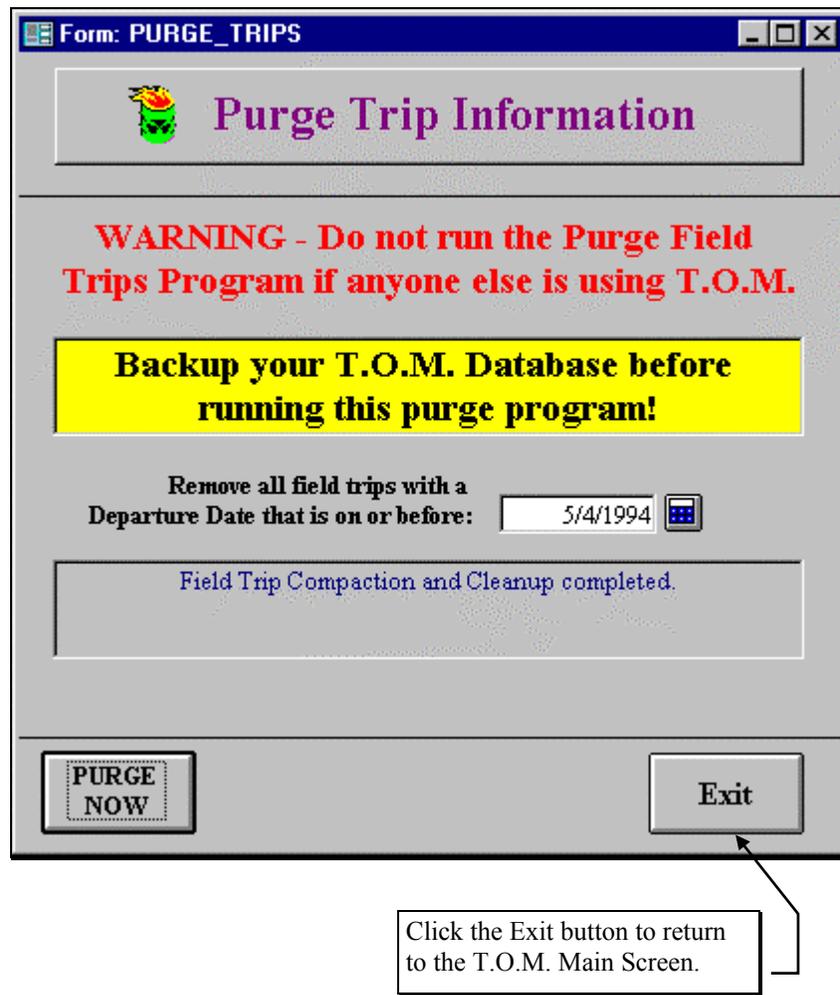


Figure 12-13. Field Trip Purge Screen After Purge is Completed

Congratulations, you’ve successfully purged old field trip information from your T.O.M. database.

8. Click the Exit button to return to the T.O.M. Main Screen (Figure 12-10).

The Field Trip Request Purge Routine

As with field trip information you are probably a little reluctant to remove field trip request information that either your schools have entered or that you have imported. But, field trip requests aren’t quite as critical to archive as field trip information. After all, any field trip request that is accepted is duplicated into the field trip database. The only field trip request information that wouldn’t be in the field trip database would be denied field trip requests and after a period of time this information would surely be of minimum value.

The Field Trip Request Purge was created for the purpose of removing old field trip request information. When you run this routine you will enter a cutoff date and the Field Trip Request Purge routine will



remove all field trip request information for field trip requests with a departure date on or before the cutoff date. Specifically, the Field Trip Request Purge Routine will remove field trips and field trip additional dates.

You can see the Field Trip Request Purge is quite comprehensive in the removal of field trip information. The following is a detailed description of how to run the Field Trip Request Purge Routine:

1. First and most importantly make a backup of your T.O.M. database. This purge routine removes the field trip request information permanently. It is always wise to have a backup copy of your T.O.M. database to fall back on in case you made a mistake in the way that you ran this routine. **NOTE:** It may be wise in fact to make two separate backup copies of your data if you are backing up to a floppy diskette. Floppy diskettes have been known to fail now and then and you wouldn't want to be put in the position of having to restore your backup only to find that the floppy diskette that you made your backup on has failed.
2. Second, also very important make sure that you are THE ONLY PERSON USING THE T.O.M. software. Make sure that all other users are not only NOT using T.O.M. but also are completely logged of the T.O.M. software. Running this routine while other persons are using the T.O.M. software will cause unpredictable and most likely unpleasant results.
3. From the T.O.M. Main Screen open the Maintain menu, and click the Field Trip Request Purge option (Figure 12-14). The Field Trip Request Purge Warning screen is displayed (Figure 12-15).

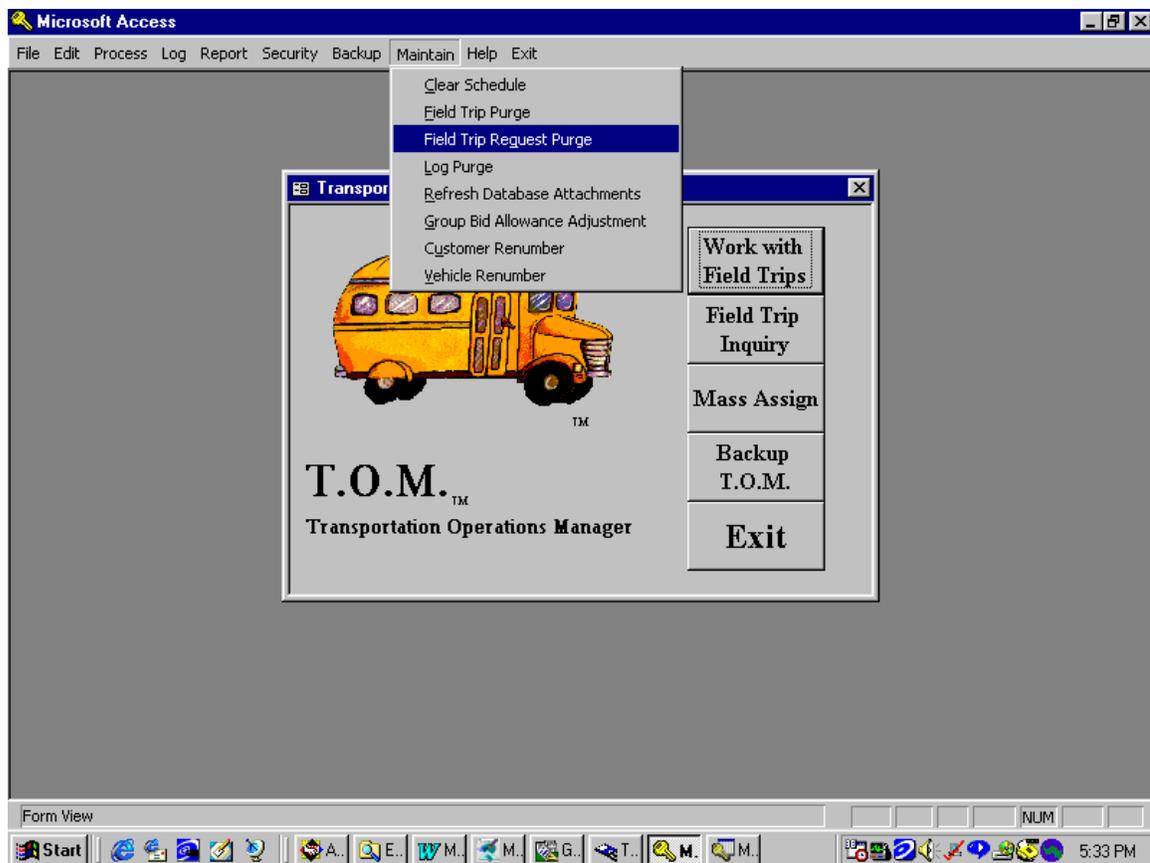


Figure 12-14. Accessing the Field Trip Request Purge Routine



4. The Field Trip Request Purge Warning screen reminds you to back up your data and have all your users log off the T.O.M. system before you run this routine. To continue click the OK button.



Figure 12-15. The Field Trip Request Purge Warning Screen

The Field Trip Request Purge screen is displayed (Figure 12-16).



5. Enter a purge cutoff date and then click the Purge Now button. The Field Trip Request Purge routine will then remove all field trip request information related to field trip requests with a departure date on or before the purge cutoff date you entered. Depending on the size of your purge file, the speed of your computer and network and the amount of information you are purging this process can take just a few seconds or quite a few minutes.

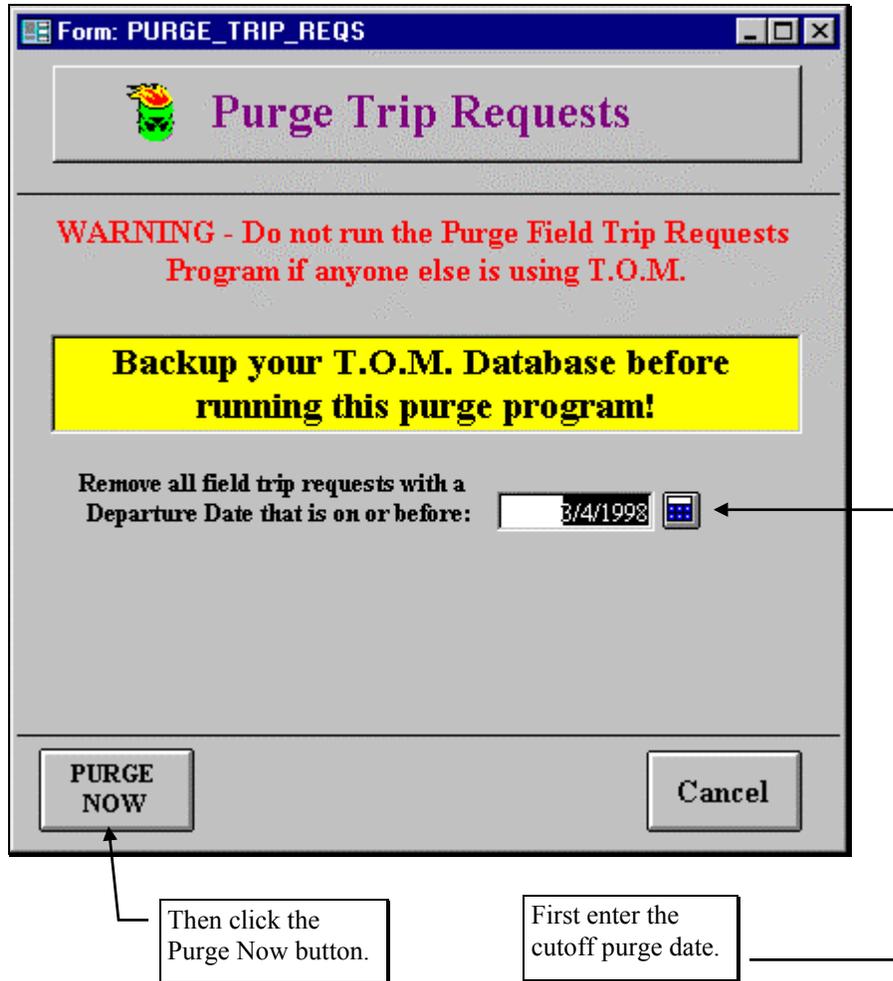


Figure 12-16. The Field Trip Request Purge Screen



- When all the related field trip request information has been purged from your T.O.M. database the Field Trip Request Purge screen will display the message “Field Trip Request Compaction and Cleanup Completed” (Figure 12-17).

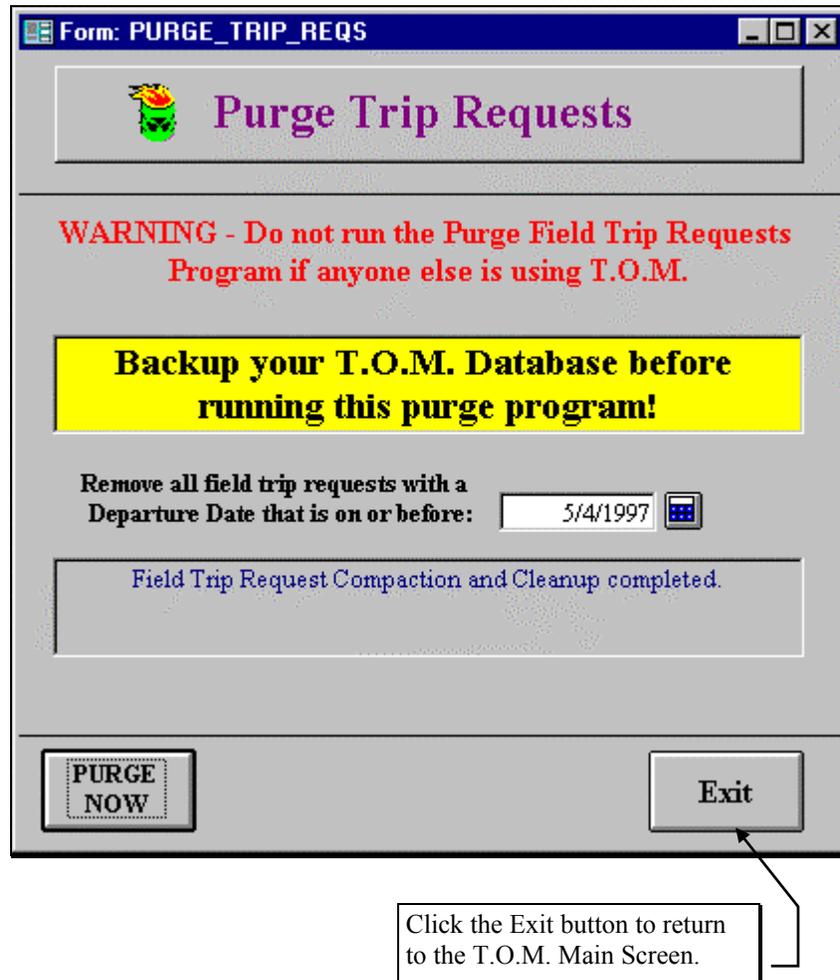


Figure 12-17. Field Trip Request Purge Screen After Purge is Completed

Congratulations, you’ve successfully purged old field trip request information from your T.O.M. database.

- Click the Exit button to return to the T.O.M. Main Screen (Figure 12-14).

