

SUBSTITUTE TEACHER TRACKING

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Getting Started

The **Substitute Teacher Tracking** program allows you to keep track of which employee (teacher, bus drivers, cafeteria or maintenance worker, etc.) was absent, on what day, for what reason, and who substituted for the employee. In addition, you can print an Authorized "**Employee Absentee Form**" by clicking on one button.

You can print substitute reports by employee or substitute to the screen and printer. The Report Query option allows you to select only the exact information you want to print. You can even save the query for future use. This is very helpful when printing information about one employee, one school, or one type of absentee.

Installing the Program

The following instructions assume you're using floppy drive A.

- 1) Place program diskette #1 in disk drive A.
- 2a) Windows 3.x
From the Program Manager Screen, select "**File**", then, "**Run**". Then type: **a:\install [Enter]**.
- 2b) Windows 95/98/NT
From the Start button of the Windows Task bar, select **RUN**. Then type: **a:\install [Enter]**.
- 3) Follow the instructions on the screen to complete the installation.

First Time You Run the Program

After first installing the program, the program is running in 'DEMO' mode. In Demo mode, you can test every option in the program.

Registering the Program

To gain unrestricted access to the program, you must register it. To register a program, do the following:

1) Received the Master Diskettes

If you ordered the program from our office, the registration information will be on the last master diskette. Put that diskette in your floppy disk drive (A or B).

Under the Utilities Menu, select '**Registration/Support**', then select '**Register Program**'.

By default, the program is set up to register the program from floppy disk drive A. If this is what you want to do, simply select < OK >. Otherwise, select the appropriate options below.

From the Program Registration Screen:

Select Register Program
 Un-Register the Program

Select the program to register:

Substitute Teacher Tracking
 All-In-One Registration

Select the drive where the registration information is located:

Registration File is in Drive A
 Registration File is in Drive B
 Other DrivePath (Please specify)

Note: If you select this last option, you must type in the drive and path where the registration information is located. For example:
c:\windows\temp (Be sure to enter the location where the registration file is located on your computer.)

2) Registering the Demo program Downloaded from our Web Site.

If you downloaded the demo program and want to purchase it, contact our sales office:

1-800-424-7512 or email us at:

sales@epesssoftware.com

When the payment or purchase order is received, you will be sent a registration file for the program. Put that file on a floppy diskette and follow the same instructions in step 1 above.

Log In Screen

Once the program is registered, you need to "Log In" before you can use the program. A Log In screen will appear.

Enter the following information:

ID: **SYS**

Password: **PASSWORD**

This is the ID and Password for the System Administrator. The System Administrator has total access (control) to everything in the program.

Once you've logged into the program, as the System Administrator, you can use the Administrator option from the Help Menu to add additional users or change passwords.

Put your program diskettes away in a safe place when you've finished.

Daily Start Up

To start the program, click on the Substitute Teacher program icon within the EPES Software folder.

When prompted for an ID, type: **SYS**

When prompted for a password, type: **PASSWORD**

Getting Help

To get help for an item on the screen:

- 1) Click on the question mark <?> at the top of the window. Then, click on the item on the screen.
- 2) When the cursor is in a field on the screen, click the question mark <?> just below the Master Menu options.
- 3) Right click on an item on the screen. Then, select '**What's This?**'.

<p>Note: While viewing a help topic, press [Alt+E] to add your own help notes. Select <OK> when done.</p>
--

Data Entry: Getting Started - Quick Overview

Note: *For detailed information on adding and viewing information, see the remainder of this manual.*

Use the **File** Menu to enter your data. Use the following order to speed up your data entry:

- 1) Select '**Schools**'. Enter your school information.
- 2) Select '**Budget Codes**' Optional. Enter your budget codes and descriptions.
- 3) Select '**Type of Absence**'. Enter or review the different types of absentees allowed by the school.
- 4) Select '**Absentee Codes**'. Review the absentee codes. Add, edit or delete them to meet the needs of your school.
- 5) Select '**Type Employee**'. Review the type employee codes and descriptions.
- 6) Select '**Employees**'. Enter the information about the employees in your school. If you wish, you can enter them as they are absent.
- 7) Select '**Substitutes**'. Enter the information about the substitute teachers as they work in your school.
- 8) Select '**Absentees**'. Enter the information about which employee was absent and which person substituted.

File Menu

Use this **Master Menu** option to add, edit, delete and review information on the screen.

Note: The order in which you enter information is important. See the 'Data Entry: Getting Started - Quick Overview' section on page 6 for details.

Absentees

Use this file to record the employee absentee and the substitute teacher. Under **File**, click on '**Absentee**'.

Note: If this is your first time into the program, see 'Adding Absentee Information' below for details on adding absentee information.

Looking up Absentee information Quickly

To quickly look up information, select one of the tabs at the top of the screen, then begin typing the information you're looking for. These tabs set the order in which information is displayed on the screen.

For example, if you wanted to look up a specific teacher to review absentee information, select the '**Employee ID**' tab.

Then, begin typing in the ID number for the employee.

Notice, that as you type, the program begins to highlight the item in the browse window closest to the information you've typed in.

Adding Absentee Information

To add a new absentee entry, select '**Insert**'.

Note: To move from item to item on the screen press the **[Tab]** key or click on the item with the mouse. Pressing **[Enter]** will save the information and return you to the absentee browse window.

Date: Press **[Enter]** to accept today's date or enter the date of the absentee. To enter a date, simply enter the 2 digit day, followed by the 2 digit month and year. Example: 021899 would be 02/18/99.

Tch ID: Enter the ID number of the employee who was absent. To select from a popup window while adding, press the **[Tab]** key when the field is blank.

Sub ID: Enter the ID number of the substitute. To select from a popup window while adding, press the **[Tab]** key when the field is blank.

Time Absent: Be consistent. If you pay by the day enter the time based upon days. For example .5 could be half a day. If you pay by the hour, enter the number of hours absent. For example 8.

Absentee ID: Enter the absentee ID to identify why the employee was absent. To select from a popup window while adding, press the **[Tab]** key when the field is blank.

Note: If you don't use a budget code, press **[Enter]** or select **<OK>** to record your information.

Budget Code: Optional. Enter a budget code to use with this absentee entry. To select from a popup window, enter **<0>** and press the **[Tab]** key.

Select **<OK>** to record the absentee. Select **<Cancel>** to quit without saving the information.

Changing Absentee Information

To change an entry, highlight the entry in the browse screen. Press [**Enter**] or click on the '**Change**' button.

To quickly find an entry, select a Tab at the top of the browse screen and begin typing until the information you want to change is highlighted in the browse window.

Make the changes and select <OK> when done.

Deleting Absentee Information

To delete an entry, highlight the entry in the browse screen. Click on the <Delete> button or press the [**Del**] key.

Print Authorization

To print an '**Employee Absentee Form**', click on the '**Print Authorization**' button.

Note: When the **Employee Absentee Form** appears on the screen, click on the printer icon (showing a 1) to print the form to the printer. Click on the '**X**' to exit without printing the form or to exit after printing the form.

Get the required signatures and then put this form in your file for permanent keeping.

Close

Select <Close> to exit and return to the **Master Menu**.

Query

You may use the query option to select specific information to look at. See the Output Menu section of this documentation for details on the using the query option. It is exactly the same, except it is used here to allow you to view specific ranges of information on the screen, rather than on a report.

Substitutes

Use this file to record the substitute teacher information. Under **File**, click on '**Substitutes**'.

Note: If this is your first time into the program, see 'Adding Substitutes' below for details on adding substitute information.

Looking up information Quickly

To quickly look up information, select one of the tabs at the top of the screen, then begin typing

the information you're looking for. These tabs set the order in which information is displayed on the screen.

For example, if you wanted to look up a specific substitute, be sure the '**Sub Name**' tab at the top of the screen is selected. Then, begin typing in the name of the substitute. Notice that as you type, the program begins to highlight the item in the browse window closest to the information you've typed in.

Adding Substitutes

To add a new substitute entry, select '**Insert**'.

Note: To move from item to item on the screen press the **[Tab]** key or click on the item with the mouse. Pressing **[Enter]** will save the information and return you to the absentee browse window.

Sub ID: Enter a unique ID number for the substitute.

Name(Last, First): Enter the last name of the substitute, followed by the first name. Example, Doe, John.

Type Employee: Enter the type employee code or enter zero (0) and press [**Tab**] to select from a popup window. For example, if this person substitutes for at teacher, enter 1.

Address: Enter the substitute's address.

City: Enter the substitute's city.

State: Enter the substitute's two digit state abbreviation.

Zip: Enter the substitute's zip code.

Phone: Enter the substitute's home phone number.

SocSecNo: Enter the substitute's social security number.

Pay Rate: Be consistent. Enter the rate of pay for this substitute, by day or hour. For example, 50 could be the pay rate for one day or 8 could be the pay rate for one hour.

Tot Day Sub: The computer automatically keeps track of the total number of days this person has substituted.

Select <OK> to record the information. Select <Cancel> to quit without saving the information.

Changing Information

To change an entry, highlight the entry in the browse screen. Press [**Enter**] or click on it with the mouse.

To quickly find an entry, select a Tab at the top of the browse screen and begin typing until the information you want to change is highlighted in the browse window.

Make the changes and select <**OK**> when done.

Deleting Information

To delete an entry, highlight the entry in the browse screen. Select <**Delete**> or press the [**Del**] key.

Close

Select <**Close**> to exit and return to the **Master Menu**.

Employees

Use this file to record the employee information. Under **File**, click on '**Employees**'.

Note: If this is your first time into the program, see 'Adding Employees' below for details on adding substitute information.

Looking up information Quickly

To quickly look up information, select one of the tabs at the top of the screen, then begin typing the information you're looking for. These tabs set the order in which information is displayed on the screen.

For example, if you wanted to look up a specific employee, select the '**Employee Name**' tab. Then, begin typing in the name of the employee. Notice that as you type the program begins to highlight the item in the browse window closest to the information you've typed in.

Adding Employees

To add a new employee entry, select '**Insert**'.

Note: To move from item to item on the screen press the **[Tab]** key or click on the item with the mouse. Pressing **[Enter]** will save the information and return you to the absentee browse window.

Tch ID: Enter a unique ID number for the employee.

Name(Last, First): Enter the last name of the employee, followed by the first name. Example, Doe, John.

Type Employee: Enter the type employee code or enter zero (0) and press **[Tab]** to select from a popup window. For example, if this employee is a teacher, enter 1.

Address: Enter the employee's address.

City: Enter the employee's city.

State: Enter the employee's two digit state abbreviation.

Zip: Enter the employee's zip code.

Phone: Enter the employee's home phone number.

SocSecNo: Enter the employee's social security number.

School ID: Enter the employee's school ID or enter zero (0) and press [**Tab**] to select from a popup window.

Sick Leave: Enter the amount of sick leave accumulated for this employee. For example, it could be 14.5 days or 140.5 hours.

Tot Day Abs: The computer automatically keeps track of the total number of days this person has been absent.

Select <**OK**> to record the information. Select <**Cancel**> to quit without saving the information.

Changing Information

To change an entry, highlight the entry in the browse screen. Press [**Enter**] or click on the <**Change**> button.

To quickly find an entry, select a Tab at the top of the browse screen and begin typing until the information you want to change is highlighted in the browse window.

Make the changes and select <**OK**> when done.

Deleting Information

To delete an entry, highlight the entry in the browse screen. Click on <**Delete**> button or press the [**Del**] key.

Close

Select <**Close**> to exit and return to the **Master Menu**.

Type Employee

Use this file to record the type of employee codes and descriptions. Under **File**, click on '**Type Employee**'.

Looking up information Quickly

To quickly look up information, select one of the tabs at the top of the screen, then begin typing the information you're looking for. These tabs set the order in which information is displayed on the screen.

For example, if you wanted to look up a specific employee code, select the '**Employee Description**' tab. Then, begin typing in the type of employee. Notice that as you type the program begins to highlight the item in the browse window closest to the information you've typed in.

Adding Type Employee Codes

To add a new type employee code, select '**Insert**'.

Note: To move from item to item on the screen press the **[Tab]** key or click on the item with the mouse. Pressing **[Enter]** will save the information and return you to the absentee browse window.

Type Emp: Enter a unique type employee ID number.

Emp Desc: Enter the name to describe this type employee.

Select **<OK>** to record the information. Select **<Cancel>** to quit without saving the information.

Changing Information

To change an entry, highlight the entry in the browse screen. Press **[Enter]** or click on the **<Change>** button.

To quickly find an entry, select a Tab at the top of the browse screen and begin typing until the information you want to change is highlighted in the browse window.

Make the changes and select **<OK>** when done.

Deleting Information

To delete an entry, highlight the entry in the browse screen. Click on the **<Delete>** button or press the **[Del]** key.

Close

Select **<Close>** to exit and return to the **Master Menu**.

Type of Absence

Use this file to add or review the type of absences allowed by the school.

For example, sick leave or personal leave.

Under **File**, click on **'Type of Absence'**. Y

Looking up information Quickly

To quickly look up information, select one of the tabs at the top of the screen, then begin typing the information you're looking for. These tabs set the order in which information is displayed on the screen.

For example, if you wanted to look up a specific type of absence, select the **'Type Absence'** tab. Then, begin typing in a type of absentee code. Notice that as you type the program begins to highlight the item in the browse window closest to the information you've typed in.

Adding Absentee Codes

To add a new Type of Absentee code, select **'Insert'**.

Note: To move from item to item on the screen press the **[Tab]** key or click on the item with the mouse. Pressing **[Enter]** will save the information and return you to the absentee browse window.

Typ Absent: Enter a unique code to identify this type of absentee. For example: S (could be for Sick Leave.)

Typ Abs Desc: Enter a description for this type of absentee. For example: Sick Leave

Select **<OK>** to record the information. Select **<Cancel>** to quit without saving the information.

Changing Information

To change an entry, highlight the entry in the browse screen. Press **[Enter]** or click on the **<Change>** button.

To quickly find an entry, select a Tab at the top of the browse screen and begin typing until the information you want to change is highlighted in the browse window.

Make the changes and select **<OK>** when done.

Deleting Information

To delete an entry, highlight the entry in the browse screen. Click on the **<Delete>** button or press the **[Del]** key.

Close

Select **<Close>** to exit and return to the **Master Menu**.

Absentee Codes

Use this file to record the absentee codes. This file allows you to define many different types of absentee codes. Carefully think through the various types of absentees allowed by the school. While doing this, consider whether a specific type of absentee counts towards the sick leave for an employee or whether it is simply a day missed. If you will use a specific code for each type of

absentee, then the Substitute Report for Employees by Absentee Code will be an easy way for you to summarize the various types of absentees used for each employee.

For example, a death or funeral in the family may count toward sick leave. A death or funeral not in the family may not count towards sick leave days.

Under **File**, click on '**Absentee Codes**'.

Looking up information Quickly

To quickly look up information, select one of the tabs at the top of the screen, then begin typing the information you're looking for. These tabs set the order in which information is displayed on the screen.

For example, if you wanted to look up a specific absentee code, select the '**Absentee Description**' tab. Then, begin typing in the type of absentee. Notice that as you type the program begins to highlight the item in the browse window closest to the information you've typed in.

Adding Absentee Codes

To add a new absentee code, select '**Insert**'.

Note: To move from item to item on the screen press the **[Tab]** key or click on the item with the mouse. Pressing **[Enter]** will save the information and return you to the absentee browse window.

Absentee ID: Enter a unique ID number for this absentee code.

Absentee Desc: Enter the name to describe this absentee code.

Select **<OK>** to record the information. Select **<Cancel>** to quit without saving the information.

Changing Information

To change an entry, highlight the entry in the browse screen. Press [**Enter**] or click on the **<Change>** button.

To quickly find an entry, select a Tab at the top of the browse screen and begin typing until the information you want to change is highlighted in the browse window.

Make the changes and select **<OK>** when done.

Deleting Information

To delete an entry, highlight the entry in the browse screen. Click on the **<Delete>** button or press the [**Del**] key.

Close

Select **<Close>** to exit and return to the **Master Menu**.

Schools

Use this file to record the name(s) of the school. Under **File**, click on '**Schools**'.

Looking up information Quickly

To quickly look up information, select one of the tabs at the top of the screen, then begin typing the information you're looking for. These tabs set the order in which information is displayed on the screen.

For example, if you wanted to look up a specific school, select the '**School Name**' tab. Then, begin typing in the name of the school. Notice that as you type the program begins to highlight the item in the browse window closest to the information you've typed in.

Adding Schools

To add a school entry, select '**Insert**'.

Note: To move from item to item on the screen press the [**Tab**] key or click on the item with the mouse. Pressing [**Enter**] will save the information and return you to the absentee browse window.

School ID: Enter a unique ID number for this school.

School Name: Enter the name of the school.

Select <**OK**> to record the information. Select <**Cancel**> to quit without saving the information.

Changing Information

To change an entry, highlight the entry in the browse screen. Press [**Enter**] or click on the <**change**> button.

To quickly find an entry, select a Tab at the top of the browse screen and begin typing until the information you want to change is highlighted in the browse window.

Make the changes and select <**OK**> when done.

Deleting Information

To delete an entry, highlight the entry in the browse screen. Click on <**Delete**> or press the [**Del**] key.

Close

Select <**Close**> to exit and return to the **Master Menu**.

Budget Codes

Use this file to record the budget codes. Under **File**, click on '**Budget Codes**'.

Looking up information Quickly

To quickly look up information, select one of the tabs at the top of the screen, then begin typing the information you're looking for. These tabs set the order in which information is displayed on the screen.

For example, if you wanted to look up a specific budget code, select the 'Budget Description' tab. Then, begin typing in the budget description. Notice that as you type the program begins to highlight the item in the browse window closest to the information you've typed in.

Adding Budget Codes

To add a new budget code, select '**Insert**'.

Note: To move from item to item on the screen press the **[Tab]** key or click on the item with the mouse. Pressing **[Enter]** will save the information and return you to the absentee browse window.

Budget Code ID: Enter a unique budget code. Consider using periods between major groups of codes. For example: 2.200.201.232.44.5

Bud Desc: Enter a descriptive name for this budget code. For example: Operating Fund

Select **<OK>** to record the information. Select **<Cancel>** to quit without saving the information.

Changing Information

To change an entry, highlight the entry in the browse screen. Press [**Enter**] or click on the **<Change>** button.

To quickly find an entry, select a Tab at the top of the browse screen and begin typing until the information you want to change is highlighted in the browse window.

Make the changes and select **<OK>** when done.

Deleting Information

To delete an entry, highlight the entry in the browse screen. Click on the **<Delete>** button or press the [**Del**] key.

Close

Select **<Close>** to exit and return to the **Master Menu**.

Printer Setup

Under **File**, click on '**Printer Setup**'. Use this option to configure your printer.

Output Menu

Use this **Master Menu** option to print reports to your screen and printer. Study the Query Options under the first report to learn how to select what information you want to print.

Substitute Reports: Employees

Use this option to select a substitute report by employee.

Substitute Reports: Employees by Employee

The following section explains how to select specific information to print the Substitute by Employee report. Use these same steps for each of the reports in this section.

Query Options

The '**Query Options**' screen will appear when you select a report. This option allows you to select exactly the information you want to print.

Please Select a Query Option

There are three buttons to choose from:

Do Not Apply a Query

Use this option to print all the information available for the report selected.

Select a Previously Saved Query

Use this option to print a report option that have previously saved.

Create a New Query

Use this option to tell the program exactly what information you'd like to print. The (New Query) screen will appear.

Note: On the New Query screen there is an option entitled '**Manual**' at the lower left. Ignore this option. It is used to manually write your own report queries. Use the options described below to tell the program what information you want to print.

Fields to Evaluate

This box lists the fields to choose from in selecting what information to include on your report. Notice each field begins with 3-4 capital letters, followed by a colon. These three letters identify which file the fields are from. The files are identified as follows:

ABC: = Absentee Codes
 ABS: = Absentees
 BUD: = Budget
 SCH: = Schools
 SUBT: = Substitute
 TEA: = Teacher (Employee File)
 TYP: = Type Employee

For example, suppose you want to print all the teachers in one school. Here's how to select the report:

- 1) Highlight **SCH:SchoolID** in the '**Fields to Evaluate**' box. Select '**Next**'.
- 2) Highlight '**Is Equal To**' in the Query Operations box. Select '**Next**'.

Note: The Query Operations box list the conditions to use in selecting a report. These are:

- **Is Equal To** - The field you selected will be equal to the value you will enter.
- **Is NOT Equal To** - The field you selected will not be equal to the value you will enter.

- **Is Greater Than** - The field you selected will be greater than the value you will enter.
- **Is Less Than** - The field you selected will be less than the value you will enter.
- **Is Greater Than or Equal To** - The field you selected will be greater than or equal to the value you will enter.
- **Is Less Than or Equal To** - The field you selected will be less than or equal to the value you will enter.

- 3) In the **SCH:SchoolID** Is Equal To box, enter the ID number for the school you want to print. For example, 1. Select **'Next'**.
- 4) Select **AND**.
- 5) Select **TYP:TypeEmp** in the Fields to Evaluate box. Select **'Next'**.
- 6) Highlight **'Is Equal To'** in the Query Operations box. Select **'Next'**.
- 7) In the **TYP:TypeEmp** Is Equal to box, enter the type employee code for the employee you want included on the report. For example, 1 (might be for teachers). Select **'Next'**.

Note: You can add additional criteria for the program to use in selecting the information to print on your report by using the **'OR'** and **'AND'** options.

For example, if you wanted to print all the teachers for one school, for one day, you'd:

- Select **AND**.
- Select **ABS>Date** in the Fields to Evaluate box. Select **'Next'**.

- Highlight **'Is Equal To'** in the Query Operations box. Select **'Next'**.
- In the **ABS:Date** Is Equal to box, enter the date you want for the report. For example, 03311999 would be 03/31/1999.

8) Select **'Finish'**.

When prompted **'Would you like to save this query?'**, select **<Yes>** to permanently record this query. Then, enter a descriptive name. For example, All Teachers in High School. You can later use the **'Select a Previously Saved Query'** option to run this report again without having to go through these steps again.

Select **<No>** to continue.

NOTE: It is often a good idea to create a query and save it even though you may need to change it a little the next time you run the report.

For example, you could enter a query to print substitute information for one employee. To do this:

- Highlight **ABS:Teacher ID** in the Fields to Evaluate box. Select **'Next'**.
- Highlight **'Is Equal To'** in the Query Operations box. Select **'Next'**.
- In the **ABS:Teacher ID** Is Equal To box, enter the ID number for the teacher you want to print. For example, 1. Select **'Next'**.
- Save the query. Name it **"Substitute Report for One Employee"**.

Now, when you want to print this same report, except for a different employee, do the following:

- After selecting the report, click on the "Select a Previously Saved Query" option.
- Under '**Query Description**', highlight the previously saved query. In this example, it was "**Substitute Report for One Employee**".
- Click on '**Change**' at the bottom of the screen.
- When **ABS:Teacher ID Is Equal To 1** appears in the Current Query box, click on '**Change**'.
- When **ABS:Teacher ID** is highlighted in the Fields to Evaluate box, click '**Next**'.
- When '**Is Equal To**' is highlighted in the Query Operations box, click '**Next**'.
- When the teacher ID you previously entered(in this example it's 1) appears in the Value Entry box, type in the teacher ID you want to print in this report. For example, maybe this time you want to print a report for teacher ID = 2, instead of 1.
- Click '**Next**'.
- Click on '**Finish**'.
- When prompted 'Would you like to Save this query', select 'No'.

That's it. The only thing you had to change was the ID number of the employee you wanted to print.

- 9) When asked '**Do you wish to PREVIEW this Report?**', select <Yes> to view the report on the screen. Select <No> to print the report directly to your printer.

Viewing a report on the screen: Report Preview

When previewing a report on the screen you have several options. These are explained below.

The preview report options are selected from the icons (pictures/symbols) at the top of the page and are explained below from left to right.

- « Select this option for '**Full WIDTH View**' of the report.

- Select this option for '**Full HEIGHT View**' of the report.

- Zoom Pct**
Use this option to change the display percentage for viewing the report on the screen.

- ◀◀ Use this option to go to the first page of the report.

- ↶📄 Use this option to go to the previous page of the report.

- 📄↷ Use this option to go to the next page of the report.

- ▶▶ Use this option to go to the last page of the report.

- 1 Use the printer icon with the number 1 on it to print the current page of the report.

- Page** Use this option to select a specific page of the report to preview.

Pages to Print

Use this option to print a range of pages.
For example, All, 1-2, 5,7, 12-15

Printer

Click on the printer (with no number in front) to print the entire report.

Copies

Use this option to tell the program how many copies of the report to print.

x

Select this option to exit without printing the report.

Substitute Reports: Employees One Employee per page

Use this option to print a separate page for each Employee's substitution report.

Substitute Reports: Employees by Date

Use this option to print an employee substitution report by date of absentee.

Substitute Reports: Employees by Absentee Code

Use this option to print an employee substitution report by absentee code. If you've carefully set up your absentee codes, this is a great summary of the exact types of absentees for each employee.

Substitute Reports: by Type Absence

Use this option to print an employee substitution report by type of absence. This allows you to summarize absentees by sick leave, personal leave, etc.

Substitute Reports: Substitutes

Substitute Reports: Substitutes by Substitute

Use this option to print a substitute report by Substitute.

Substitute Reports: Substitutes One Substitute per page

Use this option to print a separate page for each substitute.

Substitute Reports: Substitutes by Date

Use this option to print a substitute substitution report by date of absentee.

List of Employees

Use this option to print a list of employees.

List of Substitutes

Use this option to print a list of substitutes. Follow the same steps as above.

Types of Employees

Use this option to print a list of codes and descriptions for types of employees.

List of Type Absentees

Use this option to print a list of codes and descriptions for types of absentees.

Budget Codes

Budget Codes by Budget Code

Use this option to print a list of budget codes in budget code order.

Budget Codes by Budget Description

Use this option to print a list of budget codes in budget description order.

Absentee Codes**Absentee Codes by Codes**

Use this option to print a list of absentee codes in absentee code order.

Absentee Codes by Description

Use this option to print a list of absentee codes in absentee description order.

Utilities Menu

Use this **Master Menu** option to perform special program options. Each of these options is explained below.

File Manager

Use this option to do a wide variety of functions on your data files.

The File Manager window shows:

- 1) a list of the files in the program,
- 2) the number of records in each file and
- 3) the location for each data file.

This program will work on one or more files at the same time, depending on what you select (tag).

To mark (tag) one file, simply click on it with the mouse. Notice the check mark to the left of the Table Name.

Tag All

Use this option to select all files.

Untag All

Use this option to un-select all files.

Build

Use this option to re-index your data files.

Pack

Use this option to permanently erase all deleted records.

Release

Use this option to unlock (release) a file being held by the network.

Fix

Use this option to repair the selected data files.

Info

Use this option to list the information about each file: Name, Number of Records and Location.

Done

Use this option to exit the File Manager program.

Backup Data

Use this option to back up your data to a floppy disk(s). Be sure you have a blank formatted diskette in disk drive A.

Backup Data to: a:\subtdata.zip

By default the program will backup the data to your floppy drive a. If you need to change this, you may enter the drive and path where you want to create a backup copy of your data.

Files to backup: *.tps

The data files for this program all end in the three letters 'tps'. This option tells the program to backup only your data files. Normally, you will only back up data files.

[X] Backup to Floppy Disk

When checked, this option allows you to backup up your data onto multiple floppy disks. To backup your data to a hard drive: (1) type in the drive and path to backup to and (2) uncheck this box.

Backup Data

Select this option to start the backup process. When done, you'll see a message 'Files zipped - OK'. This means the backup was successful.

Close

Select this option to close the backup program and return to the Master Menu.

Restore Date

Use this option to restore the data from your floppy disk(s) back to your hard disk. Be sure you have the floppy diskette inserted into your disk drive before selecting this option.

Restore Files From: a:\subtdata.zip

By default the program will restore the data from floppy disk drive A. If you created a backup on some other drive, you'll have to type in the exact information you used when making the original backup copy of your data.

Files to Restore: *.*

By default, the program will restore all data files. If you want to restore only one file, you could enter the name of that file. However, when the program restores your data, if there is an existing data file on your hard drive, the program will warn you before it overwrites it. If you select 'Yes' you will update the file on your hard disk. If you select 'No', the program will skip the restore for the selected file.

Destination:

By default the program will restore the data to the exact drive and path used when the original backup was made. Normally, you'll leave this blank.

Note: If you change the destination of your backup, please be aware that the data will be restored to the drive and path you enter here plus the program will add the path used when making the original backup.

For example, suppose the original backup was in the c:\subtch directory. When you restored the data you entered the path as c:\temp. The data would be restored to the c:\temp\subtch directory.

Program Preferences

This screen contains the name of the school, customer ID number and registration number. It also displays the date the program was installed.

Recalculate Total Days for Abs/Sub

Use this option to automatically check and update the number of days absent for each employee and the number of days substituted for each substitute.

Start New Year

This program deletes all Absentee entries and puts the total days absent and substituted back to zero.

NOTE: Be sure you have a current backup of your data before selecting this option.

Registration/Support

Register Program

Use this option to register your program for unrestricted use. To register a program, do the following:

1) Received the Master Diskettes

If you ordered the program from our office, the registration information will be on the last master diskette.

Put that diskette in your floppy disk drive (A or B).

Under the Utilities Menu, select '**Registration/Support**', then select '**Register Program**'.

By default, the program is set up to register the program from floppy disk drive A. If this is what you want to do, simply select < **OK** >. Otherwise, select the appropriate options below.

From the Program Registration Screen:

- Select (•) Register Program
- () Un-Register the Program

Select the program to register:

- (•) Substitute Teacher Tracking
- () All-In-One Registration

Select the drive where the registration information is located:

- (•) Registration File is in Drive A
- () Registration File is in Drive B
- () Other DrivePath (Please specify)

Note: If you select this last option, you must type in the drive and path where the registration information is located. For example:
c:\windows\temp (Be sure to enter the location where the registration file is located on your computer.)

2) Registering the Demo program Downloaded from our Web Site.

If you downloaded the demo program and want to purchase it, contact our sales office: **1-800-424-7512** or email us at: **sales@epesssoftware.com**. When the payment or purchase order is received, you will be sent a registration file for the program. Put that file on a floppy diskette and follow the same instructions in step 1 above.

Update Support

Use this option to update your support renewal information for the program. You will receive a support renewal code from our office when you support is renewed.

Note: If you purchased the **All-In-One** option, you will renew your support each year. If your support is not renewed within 30 days after the completion of the year, the program will return to Demo mode.

Select the program to update:

- (•) Substitute Teacher Tracking
- () All-In-One

Support Renewal Code: Enter the support renewal code you received from our office.

Import Data ASCII

Use this option to read data from another program into this program. This option uses the standard ASCII comma delimited file format.

The program allows you to read information into three different files: Employees, Substitutes and Budget Codes. Select the appropriate file and use the following steps.

When selecting this option a warning screen will appear reminding you that no one else may be using the program when this option is selected. Select Continue or Cancel.

WARNING: BE SURE you back up your data files before using this option. This procedure will permanently alter your data.

There are three basic steps required to import a data file.

- 1) Select the file you want to import.
At the top of the screen it will say "Comma-separated file to import. Next to this is an entry field for you to type in the name of the file. If you don't know the name of the file, then click on the three dots (...) in the square to the right of the entry box.

By default, the program is looking for a file that ends with the letters BAS. For example, EMPLOYEES.BAS

If the file you're importing does not end with the three letter extension, click on the "List of File Types" box and select the extension your file is using or select all files. This will change the list of files shown in the 'File Name' box.

- 2) Press the First button to read the first record in the ASCII data file. It is common for the first record of an ASCII file to contain the names of the fields in that file. If this is the case, then those field names will appear in the 'Source File Field' box.

If the first record does not contain the names of the fields in the file, then the left list box will contain the data elements for the first record of the file.

- 3) **Note:** You should be very familiar with the data in the ASCII file if the file does not contain the names of the fields because you will have to match a data entry field in the left list box with the name of the data field in the right list box. This can be confusing at times.
- 4) Click on the field in the left list box and "drag" it to the matching field in the right list box.

This step is asking you to match up the fields in the ASCII data file (left list box) with the fields in your program (right list box). You have two options available.

A) If the ASCII file was created from this program you can simply select the 'Map by Name' option. This will match all fields from the

ASCII file to the data file in this program.

B) If the ASCII file was created by another program, click on the field in the left list box and while holding down the mouse key, drag it to the corresponding field in the right list box. Notice the No. Column on the right hand box puts in the field number for the corresponding field in the left list box. If the names of the fields are in the left list box, this is a relatively simple procedure. If the actual data for the first record of the ASCII file is in the left list box, you must know what data (in the left list box) should be associated with what name in the right list box.

Correcting a Mistake

If you make a mistake and link the wrong fields together, double click on the field in the right list box to "undo" the link.

Override Text

If there is a field that should have the same data entered for every record, you can tell the program what data to put into that field. Right click on the field in the right list box and enter the data that should appear in that field for every record. For example, it may be a school id number.

Saving Your Import Information

Once you have linked all the data fields in the ASCII file to the data fields in the currently selected file, you can save this information for future use so you do not have to re enter all the fields and associated links. To do this, select '**Save**' under Map Structure. Then, enter a descriptive name for this type of import option. To get this information back again, select the '**Retrieve**' option and enter the name you originally used.

Duplicate Checking

The following options are available when you click on the duplicate checking tab at the top of the window.

[X] Check for duplicate records

By default this option is marked. It checks the ASCII file information against the information already entered into the data file you've selected to import to.

If a duplicate is found

This option allows you to tell the program what to do if it finds a duplicate record. For example, if you've already used an employee ID# and try to import data that uses that same ID#, what do you want the program to do?

(A) Add it to the file

If you select this option it will create a duplicate record in your data file. This could cause some problems if you have unique information in a field, like an employee ID#.

(B) Ignore it

This option will not import a duplicate record.

[X] Store duplicates in a text file.

When marked, this option writes any duplicate information to a text file for you to review. By default the name of the duplicate file is:
DUPES.TXT

After finishing an import procedure, you can check this text file. If you've requested that the program add duplicates to the file, then you can look in your data file for them.

If you've requested that duplicates be ignored, then this text file will tell you the information that was not imported into your program.

From the General Tab:

Select **<Start>** to begin importing the data.

Select <**Cancel**> to exit the program.

Export Data

Use this option creates an ASCII comma delimited file from the data in this program. This file can then be used by another computer or program to import the information into that program. See the details about Importing data files in the section before this.

The program allows you to create an ASCII comma delimited file for: Employees, Substitutes, Absentees and Budget Codes. Select the appropriate file and use the following steps.

File to export to

By default the program will provide a name for the default program. For example, TEACHERS.BAS.

If you want to change the name of the file, you may do so. Simply type in the name of the ASCII data file. You may also include the drive if you want to export the file to a floppy disk drive. For example: A:\TEACHERS.BAS

However, if you're exporting the data to be used by this same program in another computer, it's recommended you accept the default name.

[X] Enclose fields in double quotation marks
Unless you have an in-depth understanding of ASCII files, leave this box marked.

[X] Insert Header Record with field name
If you are creating this ASCII file to be used by this same program on another computer, leave this box marked. It will make the importing of the data file much easier. However, If you are creating an ASCII file to be used by another program, double check on what the import option of the other

program requires. Some program want the names of the fields as the first record in the ASCII file and some programs do not want the names of the fields as the first record.

Date Format

By default the program uses the mm/dd/yyyy date format. Unless you know of a reason to change this, don't.

[] Convert ANSI to OEM

Leave this unmarked.

Selecting Fields to Export

The list box on the right lists the field name and description of all the fields in the data file you've selected. You can export any or all the fields in the file.

Tag All

By default, the program exports all the fields in the file. Notice that all the data fields have a check mark in the left hand column of the list box. This check mark means the field is selected for export.

Untag All

Use this option to unmark all data fields. Notice that none of the data fields have a check mark in the left hand column after selecting this option.

Tag / Untag

Use this option to mark and unmark individual data fields to be exported to the ASCII file.

Saving Your Export Information

Once you've set up the information you want to export, you can save this for later use or reuse.

Select <Save> and then enter a descriptive name for the file export option you're using.

Select <**R**etrieve> and then select the file name you originally used to get the information back at a later date.

Select <**S**tart> create the ASCII comma delimited export file.

Select <**C**ancel> to exit the program.

Help Menu

System Administrator

The system administrator uses this option to add additional users, change current passwords, or delete current users.

The system administrator is always identified by logging in using the **ID: SYS**

This option is only enabled when the system administrator is logged into the program.

Adding a New User

To add a new user, select '**Insert**'.

Enter a unique ID for the new user, up to three spaces.

Enter the password for this user to use.

Note: Every user must have a unique ID.
--

Changing a User's Information

To change an existing user ID or password, highlight the user and press [**Enter**] or click on the <**change**> button.

Deleting a User

To delete a user, highlight the entry in the browse window and click on the <**Delete**> button or press the [**Del**] key.

Note: DO NOT delete the SYS user.
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