

Employee Records in CCC® ONE

Overview

The job aids within this packet review topics associated with employee records within CCC® ONE.

Table of Contents

Topic	See Page
Accessing The Employee Search Screen	2
How to Create a New Employee - Employee Tab	3
How to Create a New Employee - The User Tab	5
How to Create an Employee - The Wages Tab	8
How to Search for an Employee	11
How to Edit an Employee Record	12
How to Reset an Employee's Password	13
How to Deactivate an Employee Record/User	14

Continued on next page

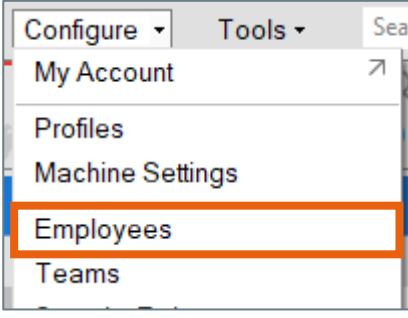
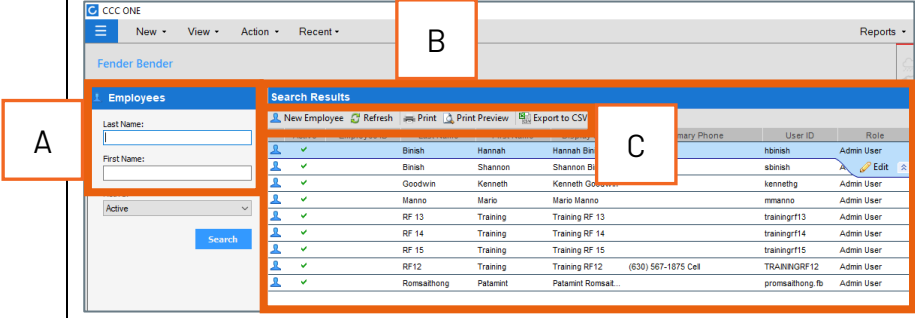
Employee Records in CCC® ONE, Continued

Employee Search Screen

This document reviews the steps necessary to access the Employee Search screen within CCC® ONE, as well as an overview of the New Employee window.

Accessing the Employee Search Screen

The following table outlines the steps necessary to access the Employee Search screen:

Step	Action
1	<p>From the Configure Menu (which is in the upper right hand of the screen), select Employees.</p> 
2	<p>The Employee Search Screen opens.</p>  <p>A. Employee Search panel. B. The Search Results pane. C. The Employee Screen toolbar – New Employee, Refresh, Print, Print Preview buttons.</p>

Continued on next page

Employee Records in CCC® ONE, Continued

Create a New Employee: Introduction

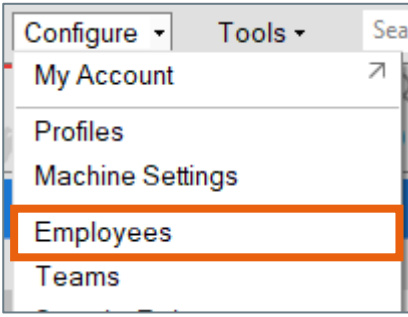
This document reviews the steps necessary to fill out the Employee tab of the New Employee form within CCC® ONE. Information can be entered in the following sections:

- Employee Info
- Location
- Emergency Contact
- Additional Information

Note: There are system required fields, as well as required fields determined by the administrator of this product and are customizable. To review required fields, go to Configure> Global Settings > Employee, Create / Edit. For additional information on customizing Employee fields, please refer to the job aid on Global Settings.

To create a New Employee, information can be entered on 2 – 3 separate tabs based on the modules your company has purchased. This table reviews the information needed to complete the Employee tab.

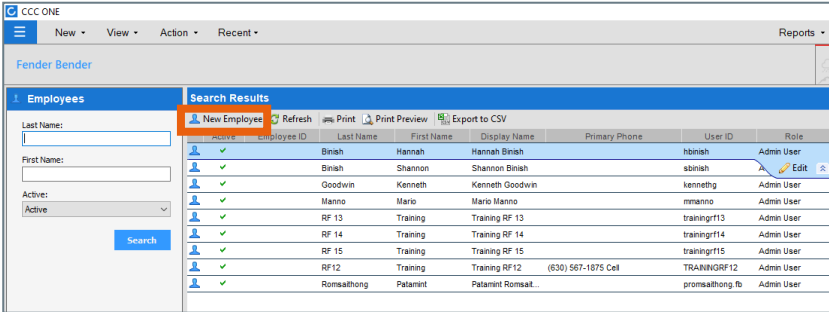
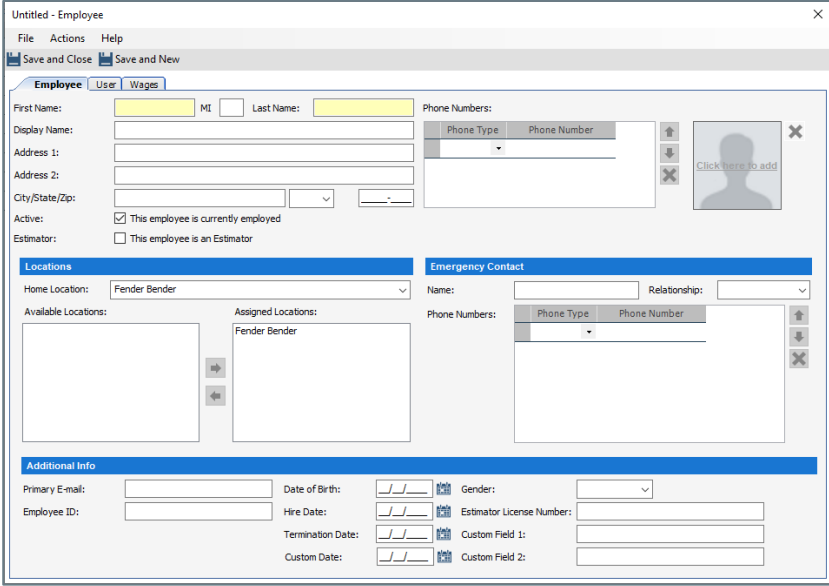
Create a New Employee

Step	Action
1	From the Configure Menu select Employees.  A screenshot of a software interface showing a dropdown menu. The menu is open, displaying several options: 'My Account', 'Profiles', 'Machine Settings', 'Employees', and 'Teams'. The 'Employees' option is highlighted with a thick orange border. Above the menu, the word 'Configure' is visible with a downward arrow, and 'Tools' is also visible with a downward arrow. A search box with the text 'Sea' is partially visible at the top right of the menu.

Continued on next page

Employee Records in CCC® ONE, Continued

Create a New Employee,
continued

Step	Action
2	<p>The Employee Search Screen opens. Click the New Employee button on the toolbar.</p> 
3	<p>The New Employee window opens. The window defaults to the New Employee tab. Enter all Employee information.</p> 
4	<p>When finished entering information click the User tab. This tab will be explained in the next section.</p>

Continued on next page

Employee Records in CCC® ONE, Continued

The User Tab: Introduction

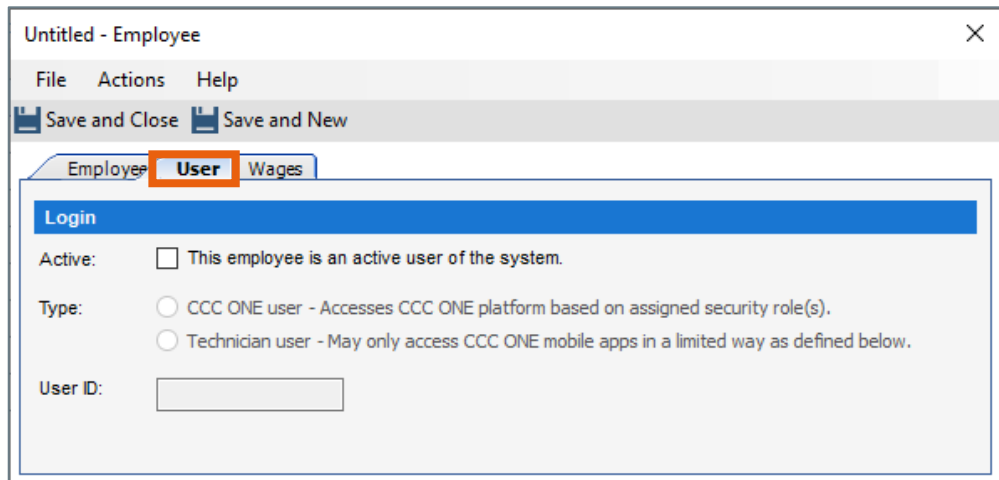
To create a New Employee, information can be entered on 2 – 3 separate tabs based on the modules your company has purchased. This section reviews the information needed to complete the User tab. To fill out this tab, information must be entered in the following sections:

- Login
- User Roles

Note: There are system required fields, as well as required fields determined by the administrator of this product and are customizable. To review required fields, go to Configure> Global Settings > Employee, Create / Edit. For additional information on customizing Employee fields, please refer to the job aid on Global Settings.

The User Tab

Select the User tab within the New Employee User Screen.



Untitled - Employee

File Actions Help

Save and Close Save and New

Employee **User** Wages

Login

Active: This employee is an active user of the system.

Type: CCC ONE user - Accesses CCC ONE platform based on assigned security role(s).
 Technician user - May only access CCC ONE mobile apps in a limited way as defined below.

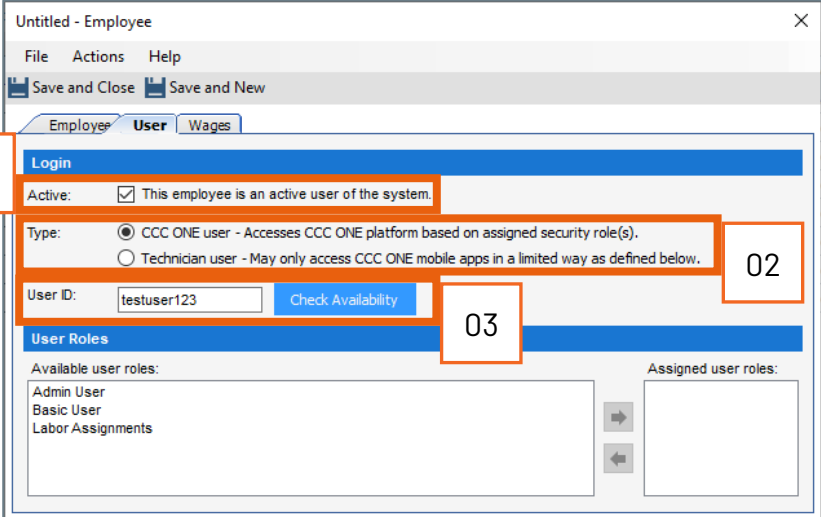
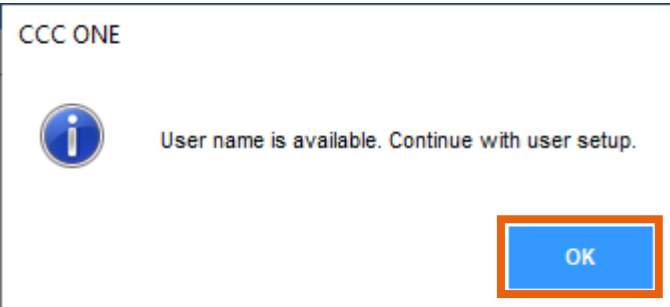
User ID:

Continued on next page

Employee Records in CCC® ONE, Continued

The User Tab,
continued

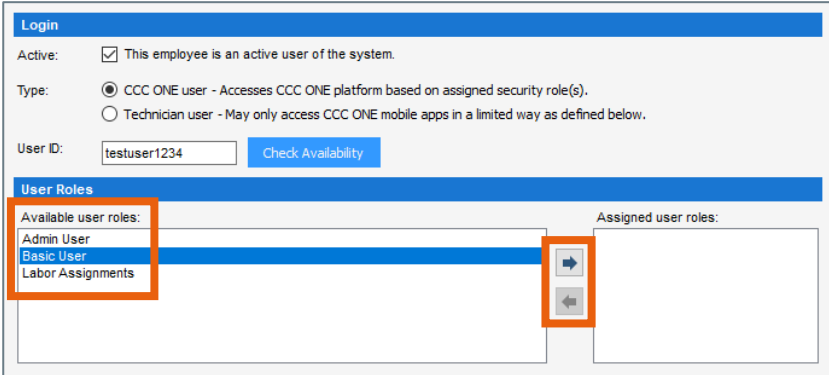
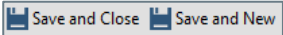
Follow the steps below to create a User Login and to set User Roles.

Step	Action
1	<p>Use the check box to indicate the user as an Active user of the system.</p> 
2	Select the User Type.
3	Enter a User ID in the text box. Then click Check Availability to confirm the User ID.
4	<p>If the User ID is available, a system confirmation message is displayed.</p>  <p>Click OK.</p>

Continued on next page

Employee Records in CCC® ONE, Continued

The User Tab,
continued

Step	Action
5	<p>Select and assign Available user roles by clicking on the role and using the arrow keys to assign a particular role.</p> 
6	<p>Once you have completed the User tab, you can continue to the Wages tab.</p> <p>Note: This is only necessary if your company has purchased the Labor Module. If they have not, continue to step 7 to complete creating an employee. If your company has the Labor Module, skip step 7 and continue with the Wages Tab Job Aid.</p> <p>Note: An Employee does not need to be a user of CCC® ONE to have Wages information entered.</p>
7	<p>Once you have entered all the information required, click the Save and Close button at the top of the screen.</p>  <p>Note: If you are creating multiple employees, you can click Save and New to open a New Employee window.</p> <p>Note: After an employee is created and saved in the system, the Reset Password button becomes available. This occurs only if the employee is setup with a User ID/ password. If you set up an employee and did not enter information on the User tab, this functionality would not be available. For additional information on Resetting Passwords, please refer to the separate job aid within this packet.</p>

Continued on next page

Employee Records in CCC® ONE, Continued

The Wages Tab: Introduction

This document reviews the steps necessary to fill out the Wages tab of the New Employee form within CCC® ONE.

Note: This tab is only available if you have the Labor Module within CCC® ONE. If you do not, please skip to Step 12 of the table below.

The Wages Tab

To create a New Employee, information can be entered on 2 – 3 separate tabs based on the modules your company has purchased. This section reviews the information that can be entered on the Wages tab. To complete this tab, information can be entered in the following sections:

- Payroll Location
- Job Title
- Work Class
- Pay Type
- Wage
- Labor Type

Note: There are system required fields, as well as required fields determined by the administrator of this product and are customizable. To review required fields, go to Configure> Global Settings > Employee, Create / Edit. For additional information on customizing Employee fields, please refer to the job aid on Global Settings.

The screenshot shows the 'Wages' tab of the 'Employee' form in CCC ONE. The form includes the following fields and options:

- Payroll Location: [Text Field]
- Timecard PIN: [Text Field]
- Job Title: [Text Field]
- Work Class: Direct Labor, Indirect Labor
- Pay Type: Salary, Hourly, Flat Rate / Commission
- Wage: (Salary per Pay Period), (Hourly Pay Rate), (Guaranteed per Pay Period)
- Buttons: + Add Line, X Delete Line
- Table with columns: Labor Type, Flat Rate \$, Commission %, Assign %
- Checkboxes: Employee may clock into jobs without being assigned, Employee may clock into multiple repair orders at once

Note: Since Salary is selected as the Pay Type in this example, Payroll Location, Job Title, and Salary per Pay Period are system required fields. If Pay Type = Hourly, then Hourly Pay Rate is a system required field. If Pay Type = Flat Rate Commission, then only Guaranteed per Pay Period is enabled, and it is an Optional field.

Continued on next page

Employee Records in CCC® ONE, Continued

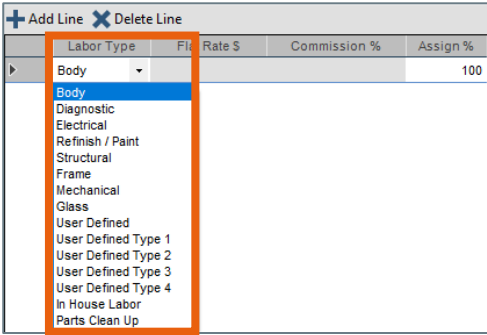
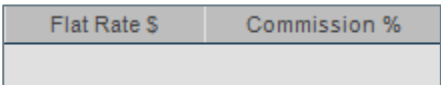
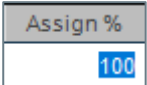
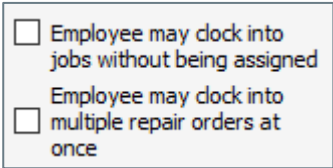
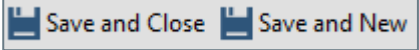
The Wages Tab

Step	Action
1	Select Payroll Location from the drop-down list.
01	Payroll Location:
02	Wage:
03	Generate
04	Work Class: <input checked="" type="radio"/> Direct Labor <input type="radio"/> Indirect Labor
05	Pay Type: <input checked="" type="radio"/> Salary <input type="radio"/> Hourly <input type="radio"/> Flat Rate / Commission
2	Enter a Job Title.
3	To generate a Timecard PIN, click the Generate button. Note: You can also manually enter a Timecard PIN.
4	Select the radio button for Direct or Indirect Labor.
5	Select the radio button for Pay Type.
6	Use the text box to enter in the appropriate Wage.
06	Wage:
07	+ Add Line
7	Click the Add Line button to add a Labor Type to the User. Note: Steps 7 – 10 are available when Work Class = Direct Labor.

Continued on next page

Employee Records in CCC® ONE, Continued

The Wages Tab, continued

Step	Action
8	<p>Use the drop-down menu to select the Labor Type.</p> 
9	<p>If you selected Flat Rate/Commission as the Pay Type, enter a Flat Rate \$ and a Commission % into the text boxes.</p> 
10	<p>Assign a percentage for Assign %.</p> 
11	<p>Use the check boxes to indicate Employee permissions.</p> 
12	<p>Once you have entered all of the information required on all three tabs, click the button at the top of the screen.</p>  <p>Note: If you are creating multiple employees, you can click Save and New to open a New Employee window.</p>

Continued on next page

Employee Records in CCC® ONE, Continued

Searching for an Employee: Introduction

This job aid reviews the steps necessary to search for an employee record within CCC® ONE.

Searching for an Employee

The following table outlines the steps necessary to Search for an Employee record.

Step	Action
1	Go to the Employee Search Screen through the Configure Menu > Employees.
2	On the left-hand side is the Employees Search criteria. <div data-bbox="581 772 857 1045" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> </div>
3	Enter the Last and/or First Name and an Active status. Then click the Search button.
4	The Search Results display. <div data-bbox="581 1203 1409 1360" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> </div>

Continued on next page

Employee Records in CCC® ONE, Continued

Editing an Employee Record: Introduction

This job aid reviews the steps necessary to edit an employee record within CCC® ONE.

Editing an Employee Record

The following table outlines the steps necessary to Edit an employee record.


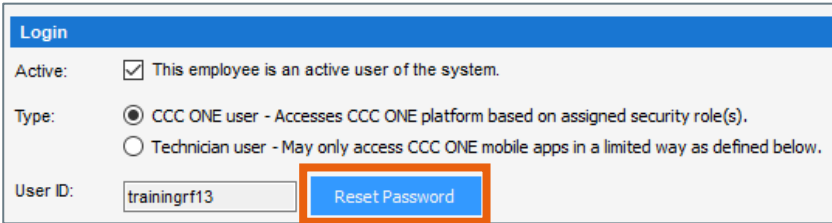
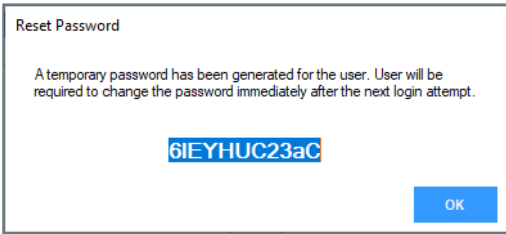
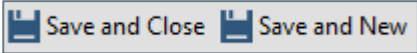
Step	Action
1	Go to the Employee Search Screen using either the Configure Menu > Employees or the New Employee button in the Labor Workflow.
2	Double-click on an employee record or click on the Edit button on the mini toolbar. <div data-bbox="581 894 1411 1052" data-label="Image"> </div>
3	Navigate through the tabs associated with this employee record and make any necessary changes. <div data-bbox="581 1161 1247 1629" data-label="Image"> </div>
4	Once you have entered all of the information required, click the Save and Close button at the top of the screen. <p>Note: You can click Save and New to open a New Employee window.</p>

Resetting an Employee's Password: Introduction

This job aid reviews how to reset a User's password.

Resetting an Employee's Password

The following table outlines the steps necessary to reset a password.

Step	Action
1	Go to the Employee Search Screen through the Configure Menu > Employees.
2	<p>Double-click on an employee record or click on the Edit button on the mini toolbar.</p> 
3	<p>Select the User tab. Click Reset Password button.</p> 
4	<p>A Temporary Password is assigned.</p>  <p>Note: You will need to pass the temporary password on to the user. He/she will be required to use this temporary password upon next login.</p>
5	<p>Select OK and then click Save and Close.</p> 

Continued on next page


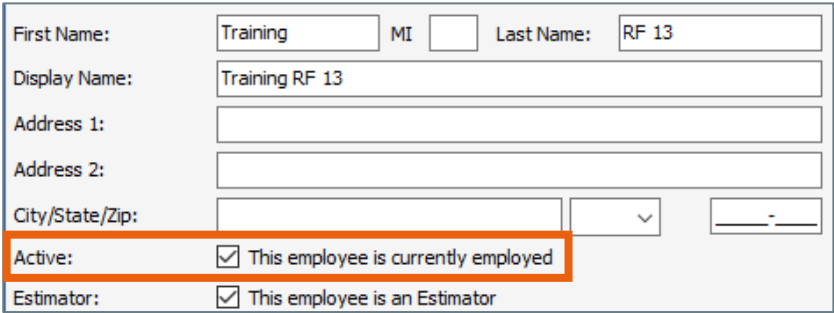
Employee Records in CCC® ONE, Continued

Deactivating an Employee: Introduction

This job aid reviews the steps necessary to deactivate an employee record, as well as a User ID within CCC® ONE.

Deactivating an Employee

The following table outlines the steps necessary to deactivate an employee.


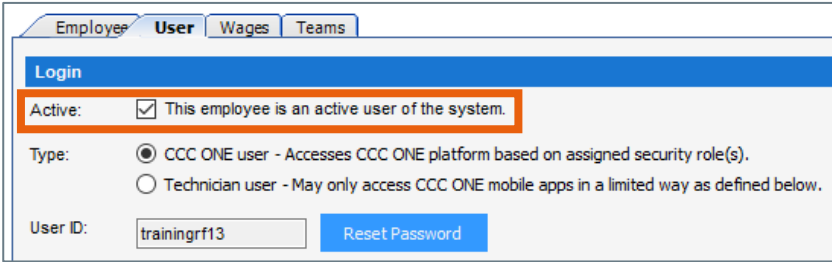
Step	Action
1	Go to the Employee Screen through the Configure Menu > Employees.
2	<p>Double-click on an employee record or click on the Edit button on the mini toolbar.</p>  <p>The Employee Record displays.</p>
3	<p>Under the Employee Info section, deselect the check box next to Active.</p> 
4	Click Save and Close .

Continued on next page

Employee Records in CCC® ONE, Continued

Deactivating a User

The following table outlines the steps necessary to deactivate a User.

Step	Action
1	Go to the Employee Search Screen through the Configure Menu > Employees.
2	<p>Double-click on an employee record or click on the Edit button on the mini toolbar.</p>  <p>The Employee Record displays. Select the User tab.</p>
3	<p>Deselect the check box next to Active.</p> 
4	Click Save and Close .