

Working with Teams in CCC® ONE

Introduction The job aids within this document review topics associated with creating and maintaining teams in CCC® ONE.

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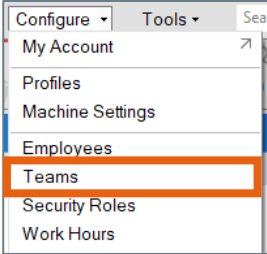
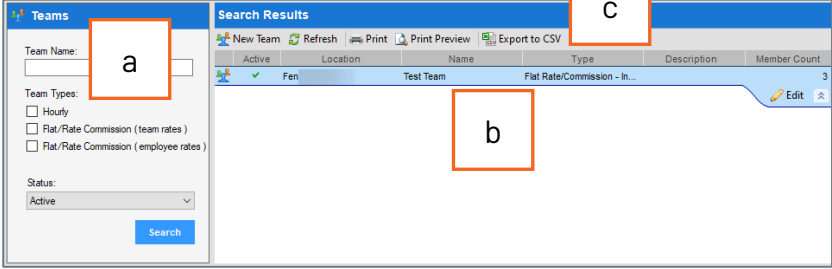
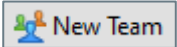
The Teams Search Screen

Introduction

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

Accessing the Team Search Screen

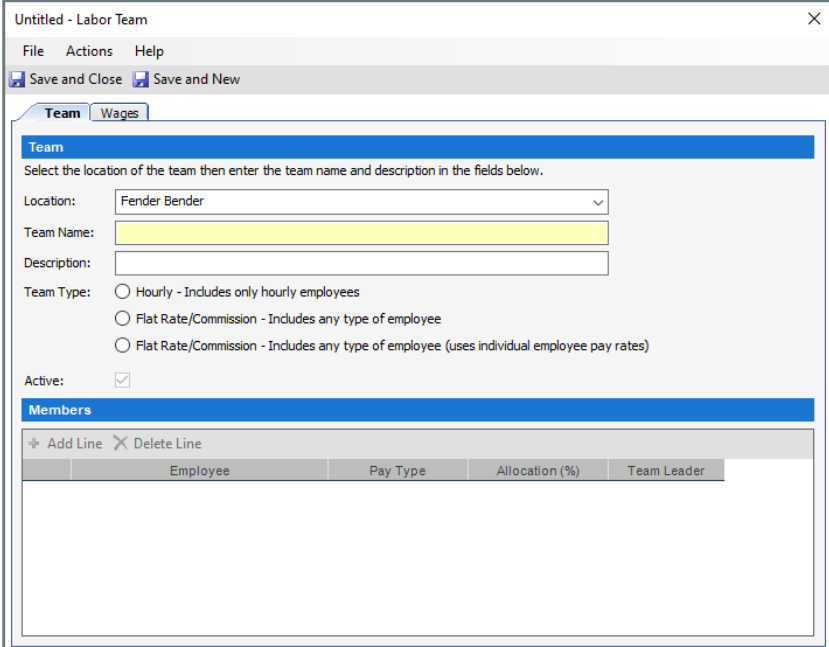
Use the following steps to access the Team Search screen:

Step	Action
1	<p>Click on the Configure menu, then select Teams from the drop-down menu.</p> 
2	<p>The Team Search Screen opens:</p>  <p>A. Team Search Panel B. The Search Results Panel C. The Team Screen toolbar: New Team, Refresh, Print, Print Preview, and Export to CSV buttons.</p>
3	<p>Click the New Team button on the toolbar.</p> 

Continued on next page

The Teams Search Screen, Continued

Accessing the Team Search Screen, continued

Step	Action
4	<p>The New Team window opens. The window defaults to the Team tab. This tab is reviewed in the next section of this document.</p> 

How to Create a New Team – Team Tab

Introduction

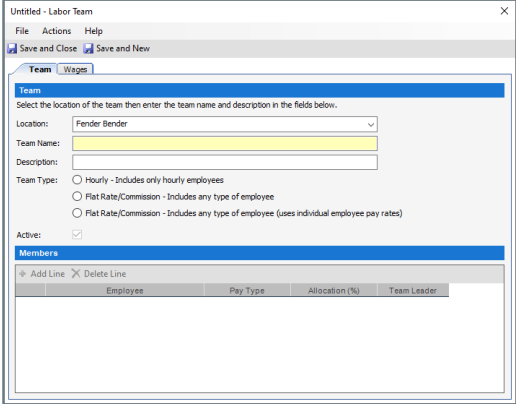
This document reviews the steps necessary to fill out the **Team** tab of the **New Team** form within CCC® ONE. Information can be entered into the following sections:

- Team
- Members

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 > Labor Team, Create / Edit**. For additional information on customizing Team fields, please refer to the job aid on Global Settings.

Team Tab

To create a **New Team**, information is entered on 2 different tabs, **Team and Wages**. This table reviews the information needed to complete the Team tab:

Step	Action
1	<p>Enter the information in the Team section of this tab.</p>  <ul style="list-style-type: none">• Location• Team Name• Description (of team function)• Team Type: Your selection here impacts what is available in the Member section. If you choose Hourly, the radio buttons are grayed out as unavailable because they are not compatible with using an Hourly pay rate. Important! If you choose Hourly, the Wages tab is unavailable because the Employee is paid at an hourly rate.• Active: Defaulted to Selected. Only active employees can be put on Teams.

	<p>Note: Required fields are indicated by a yellow background. Ex: Team Name</p>
2	<p>The Members section allows you to identify both the type of allocations and the Employees for this Team. If you chose Hourly, in the Team section, you can only add the Employee, allocation percentage is grayed out. If you selected Flat Rate/Commission, you need to choose whether to use fixed allocation percentages or not. Enter the information in the Member section of this tab:</p> <ul style="list-style-type: none"> • Fixed Allocation Percentages • Do Not Use Fixed Allocation Percentages • Team Type: Your selection here impacts what is available in the Member section. If you choose Hourly, the radio buttons are unavailable because they are not compatible with using an Hourly pay rate. • Add Line: Add Employees to this Team. Specify the Pay Type, allocations and which Employee is the Team Leader.
3	<p>When finished, click the Wages tab to continue, if available for this Team. OR click Save and Close or Save and New if you want to create another New Team.</p>

How to Create a New Team – Wages Tab

Introduction

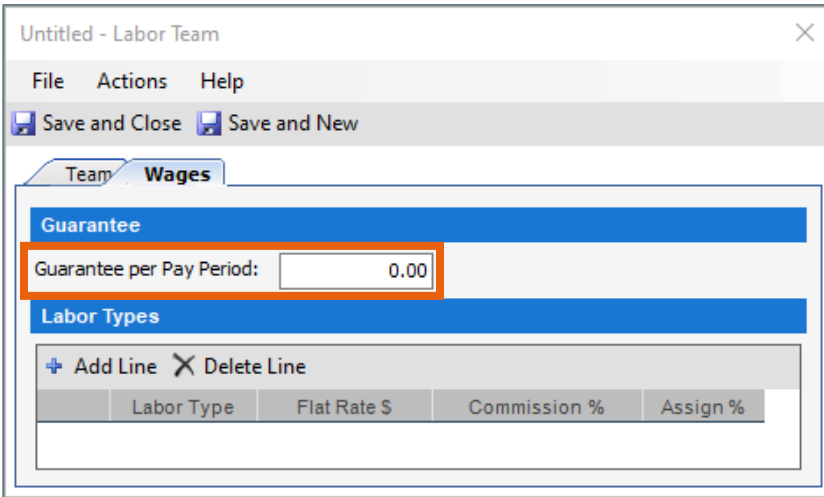
This document reviews the steps necessary to fill out the **Wages** tab of the New Team form within CCC ONE®. Information can be entered into the following sections:

- Guarantee
- Labor Types

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 > Labor Team, Create / Edit. For additional information on customizing Team fields, please refer to the job aid on Global Settings.

Wages Tab

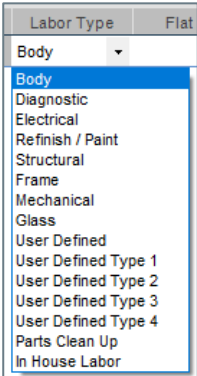
To create a **New Team**, information is entered on 2 different tabs, **Team and Wages**. The Wages tab is only available if you chose Flat Rate/Commission as the Team Type. This table reviews the information needed to complete the Wages tab:

Step	Action
1	<p>Enter the information in the Guarantee section of this tab.</p>  <p>Guarantee per Pay Period: This is the amount Team Members are guaranteed to get for work on this Team.</p>
2	Enter information into the Labor Types section of this tab.
3	To add Labor Types to this Team, click the Add Line button.

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How to Create a New Team – Wages Tab, Continued

Wages Tab,
continued

Step	Action
4	Use the drop-down arrow to select Labor Type . 
5	Add Flat Rate or Commission Percentage to the Labor Type.
6	Select the Assign Percentage for that Labor Type. This means how much of this Team's time should be allocated to the selected Labor Type.
7	When finished, click Save and Close or Save and New to create another New Team.

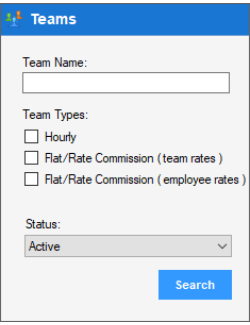
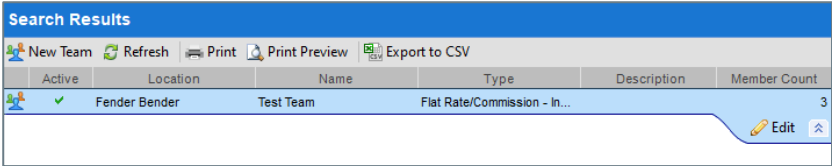
How to Search for an Existing Team by Status & Location

Introduction

This job aid reviews the steps to search for existing Teams within CCC[®] ONE.

Search for Team

Use the following steps to search for an existing Team:

Step	Action
1	Go to Configure > Teams .
2	<p>The Teams Search criteria are located on the left side of the screen.</p> 
3	Use the radio buttons to identify the locations to search. Teams can be associated with all locations or specific locations.
4	<p>Select a Status from the drop-down menu.</p> <ul style="list-style-type: none"> • All • Active (Default) • Inactive
5	<p>Click the Search button. The Search Results display to the right.</p> 

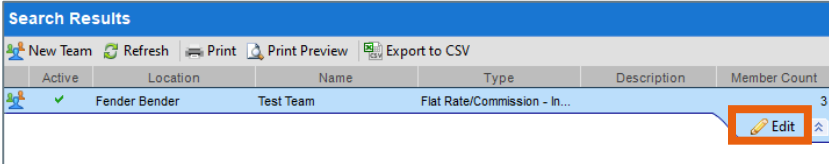
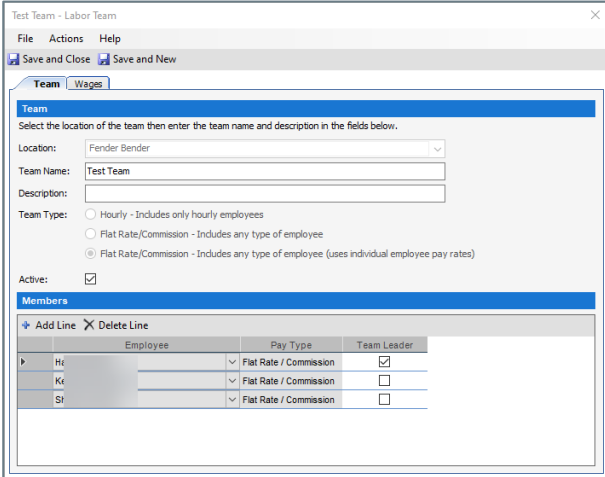
How to Edit an Existing Team

Introduction

This job aid reviews how to edit an existing Team.

Edit Team

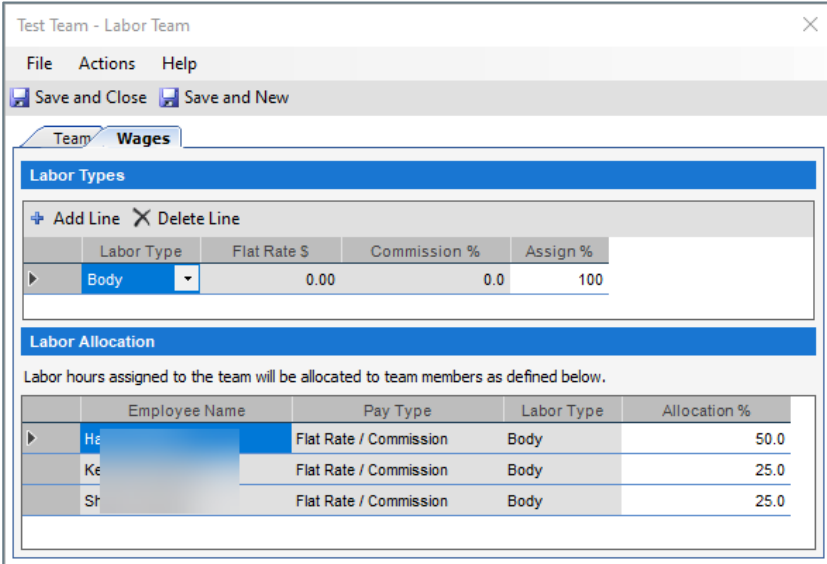
Use the following steps to edit an existing Team:

Step	Action
1	Go to Configure > Teams .
2	Double-click on the Team or click Edit on the mini toolbar. 
3	The Team window opens to the Team tab.  You can make the following edits on this tab: <ul style="list-style-type: none"> • Team Name • Description • Active: You can deactivate a Team if needed. • Add/Delete: You can add or delete Members as needed. You cannot edit: <ul style="list-style-type: none"> • Team Location • Team Type • Allocations

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How to Edit an Existing Team, Continued

Edit Team,
continued

Step	Action
4	Click on the Wages tab.
5	<p>The Wages tab displays.</p>  <p>You can make the following edits on this tab:</p> <ul style="list-style-type: none"> • Guarantee per Pay Period • Add/Delete: You can add or delete Members as needed.
6	When finished editing, click Save and Close to exit the Team window or Save and New to create a new Team.

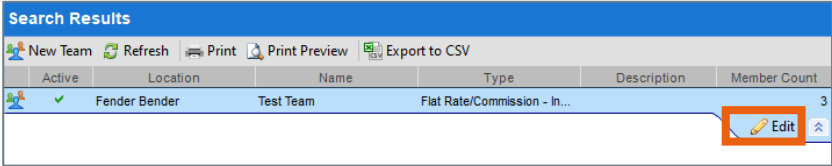
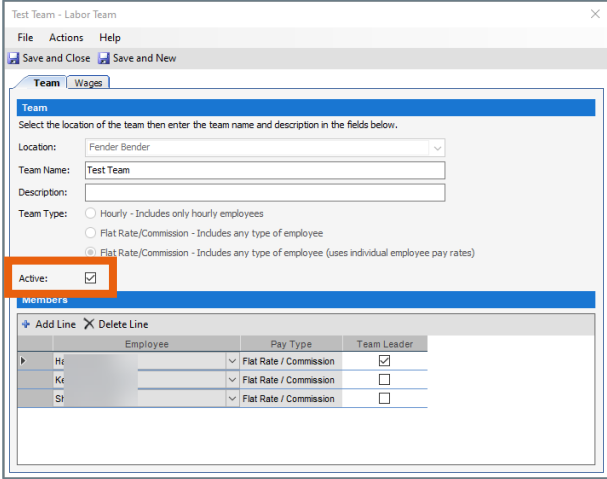
How to Deactivate a Team

Introduction

This job aid reviews how to deactivate an existing Team.

Deactivate a Team

Use the following steps to deactivate a Team:

Step	Action
1	Go to Configure > Teams .
2	Double-click on the Team or click Edit on the mini toolbar. 
3	The Team window opens to the Team tab. 
4	Deselect the checkbox next to Active .
5	Click Save and Close .