MITEL

MITEL NETWORKS™

6120
Contact Center Scheduling

User Guide

version 3.0
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Introducing 6120 Scheduling

Mitel Networks™ 6120 CCS (Contact Center Scheduling) consists of 6120 CCS Administrator and 6120 CCS (Call Center Edition).

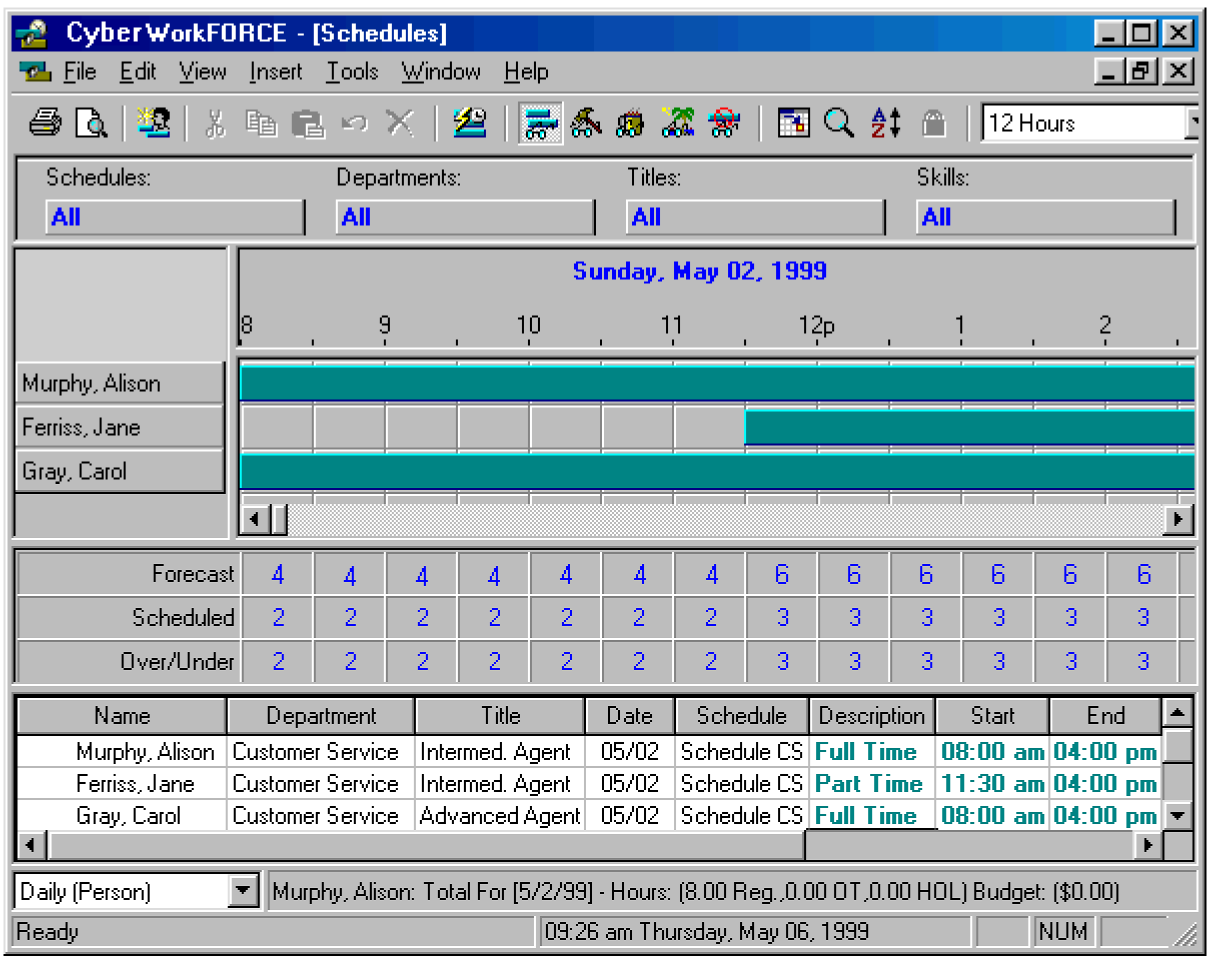
You must first configured your network security requirements with the Administrator. Please see the *Mitel Networks 6120 Contact Center Schedule Installation Guide* for setup instructions.

Then, with the 6120 CCS Call Center Edition you can schedule your employees to best suit your call center needs:

- You can customize schedules and groups.
- You can match an employees skills to those skills required for each schedule.
- You can easily view the distribution of employees across each shift.
- You can print schedule reports.

When you start 6120 CCS Call Center Edition, Figure 1 appears.

Figure 1 6120 CCS Scheduler window



Options window

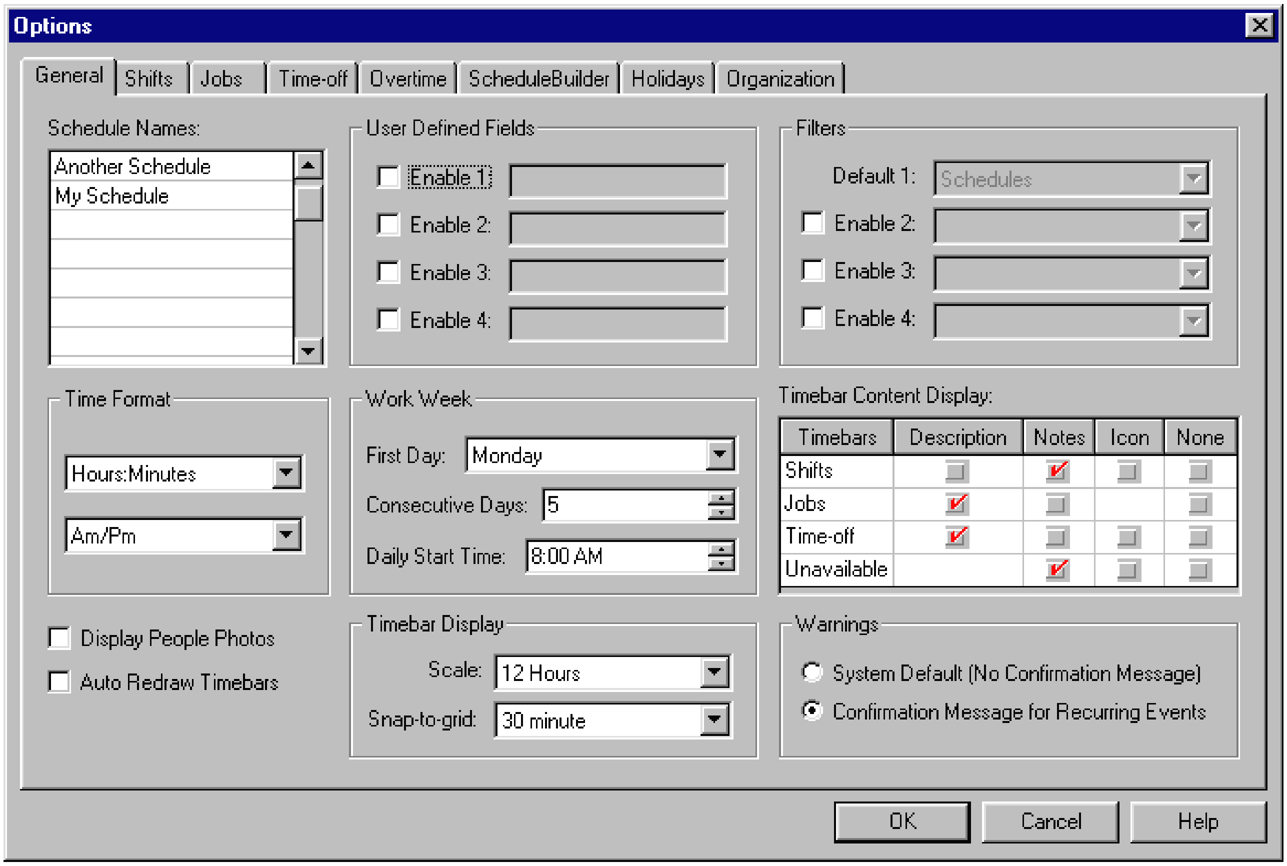
You can customize schedules and groups with the Options window. It consists of eight tabs you use to specify schedule parameters: General, Shifts, Jobs, Time-off, Overtime, Schedule Builder, Holidays, and Organization.

General tab

When you click Tools=>Options, Figure 2 appears.

On the General tab, you can create filters to assist in searching for employees, and specify 6120 CCS display attributes.

Figure 2 Options window: General tab



Adding, editing, and deleting schedule names

To add a schedule name:

1. Click **Tools**=>**Options**.
2. Click the **General** tab.
3. In the **Schedule Names** list, click an empty field.
4. Type a name for the schedule to be added.

To edit a schedule name:

1. In the **Schedule Names** list, click the schedule name to be edited.
2. Type a new name for the schedule.

To delete a schedule name:

1. In the **Schedule Names** list, click the schedule name to be deleted.
2. Press **Delete**.

Enabling and disabling user-defined fields

To enable user-defined fields:

1. Click **Tools**=>**Options**.
2. Click the **General** tab.
3. Under **User Defined Fields**, select one or more check boxes to enable one or more fields.
4. If you are enabling a field for the first time, type the name of the field in the box.

To disable user-defined fields:

1. Under **User Defined Fields**, clear one or more check boxes to disable one or more fields.

Enabling and disabling filters

To enable filters:

1. Click **Tools**=>**Options**.
2. Click the **General** tab.
3. Under **Filters**, select one or more check boxes to enable one or more filters.
4. Select the corresponding filter types.

To disable filters:

1. Under **Filters**, clear one or more check boxes to disable one or more filters.

Setting the time formats

To set the time formats:

1. Click **Tools**=>**Options**.
2. Click the **General** tab.
3. Under **Time Format**, select time display formats.

Setting the first day of the work week

To set the first day of the work week:

1. Click **Tools**=>**Options**.
2. Click the **General** tab.
3. In the **First Day** list, select a day for the start day of the work week.

Setting the daily start time

To set the daily start time:

1. Click **Tools**=>**Options**.
2. Click the **General** tab.
3. In the **Daily Start Time** list, select a time for the daily start time.

Setting the time bar content, scale, and snap-to-grid displays

To set the time bar content display:

1. Click **Tools**=>**Options**.
2. Click the **General** tab=>**Work Week**.
3. Under **Timebar Content Display**, select one or more check boxes to display event information on the time bar display.

To set the time bar display scale:

1. In the **Scale** list, select the time scale to be displayed on the time bar display.

To set the snap-to-grid display scale:

1. In the **Snap-to-grid** list, select the snap-to-grid frequency.

Displaying photos of Employees

To display photos of employees:

1. Click **Tools**=>**Options**.
2. Click the **General** tab.
3. Select the **Display People Photos** check box to display photos.

Automatically redrawing time bars

To automatically redraw time bars:

1. Click **Tools**=>**Options**.
2. Click the **General** tab.
3. Select the **Auto Redraw Timebars** check box.

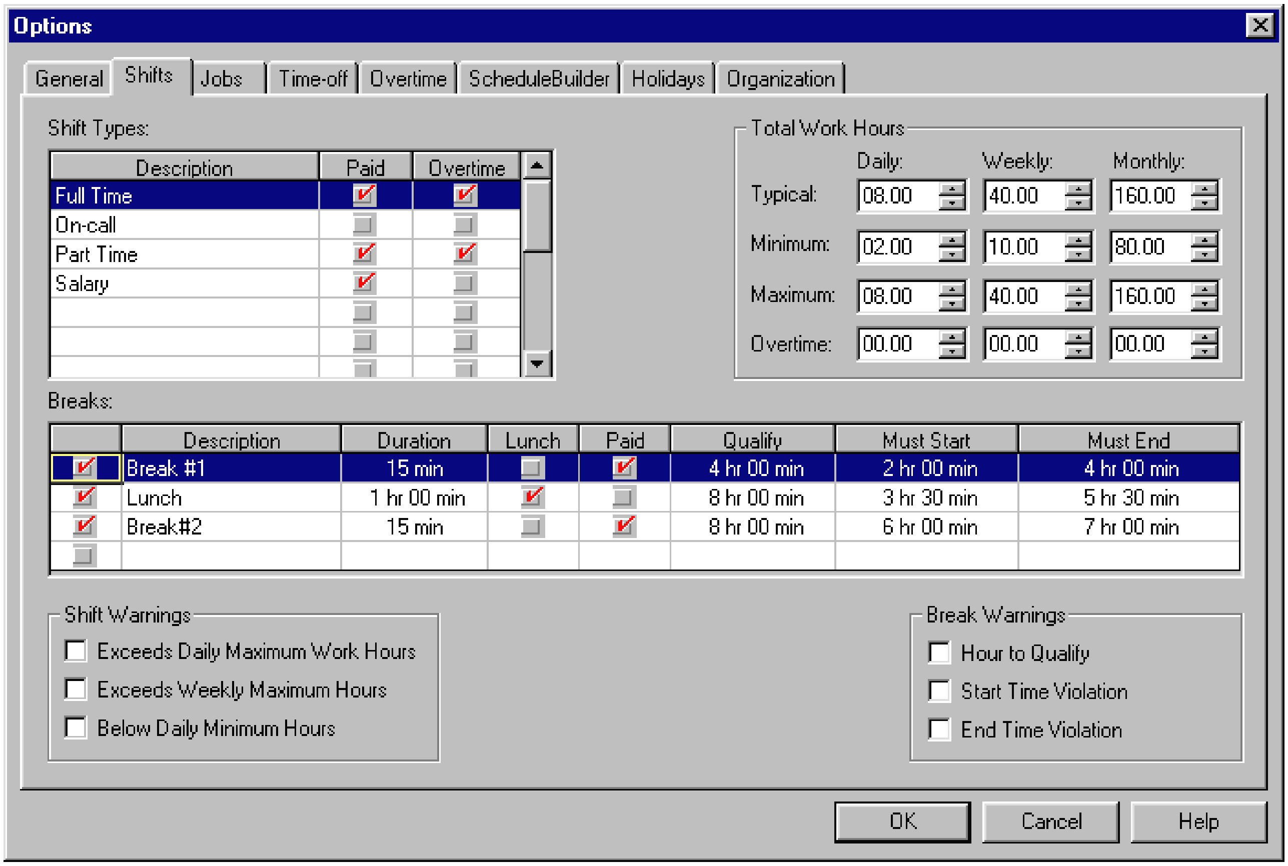
The time bars will be automatically redrawn whenever changes are made to the Schedules window.

Shifts tab

When you click Tools=>Options and click the Shifts tab, Figure 3 appears.

On the Shifts tab, you can add shift types, then specify shift attributes and warnings.

Figure 3 Options window: Shifts tab



Adding, editing, and deleting shift types

To add a shift type:

1. Click **Tools**=>**Options**.
2. Click the **Shifts** tab.
3. Under **Shift Types**, click an empty field.
4. Type a name for the shift to be added.

To edit a shift type:

1. Under **Shift Types**, double-click the shift type to be edited.
2. Type the change.

To delete a shift type:

1. Under **Shift Types**, click the shift type to be deleted.
2. Press **Delete**.

Setting the total work hours

To set the total work hours:

1. Click **Tools**=>**Options**.
2. Click the **Shifts** tab.
3. Under **Shift Types**, select a shift type.

In the Total Work Hours group, set the daily, weekly, and monthly total hours for a typical, minimum, and maximum shift.

Adding, editing, and deleting a break

To add a break:

1. Click **Tools**=>**Options**.
2. Click the **Shifts** tab.
3. Select the shift type to which you will add a break.
4. In the **Breaks** table, click an empty field in the **Description** column.
5. Select the check box adjacent to the **Description** column to enable the break.
6. In the **Description** column, type a name for the break.
7. In the **Duration** column, type the time allotted for the break, or set the time using the spin boxes and the left and right arrow buttons on your keyboard.
8. Select the **Lunch** check box if you are adding a lunch break.
9. Select the **Paid** check box if you are adding a paid break.
10. In the **Qualify** column, type the minimum amount of time required for the person's absence to be considered a break.
11. In the **Must Start** column, type the duration from the beginning of the shift before the break can start. For example, in Figure 1-6, the break must start 6 hours from the beginning of the shift. The shift begins at 8:00A.M., therefore, the break can start at 2:00P.M.
12. In the **Must End** column, type the duration from the beginning of the shift before the break must end. For example, in Figure 1-6, the break must end 7 hours from the beginning of the shift. The shift begins at 8:00A.M., therefore, the break must be completed by 3:00P.M.

To edit a break:

1. Select the shift type for which you will edit a break.
2. In the **Breaks** table, click the break to be edited in the Description column.
3. Type the change.

To delete a break:

1. Select the shift type from which you will delete a break.
2. In the **Breaks** table, clear the check box adjacent to the Description column.

Setting shift warnings

Shift warnings consist of Exceeds Daily Maximum Work Hours, Exceeds Weekly Maximum Hours, and Below Daily Minimum Hours.

To set shift warnings:

1. Click **Tools**=>**Options**.
2. Click the **Shifts** tab.
3. Under **Shift Warnings**, select one or more check boxes.

Setting break warnings

Setting break warnings consist of Hour to Qualify, Start Time Violation, and End Time Violation.
To set break warnings:

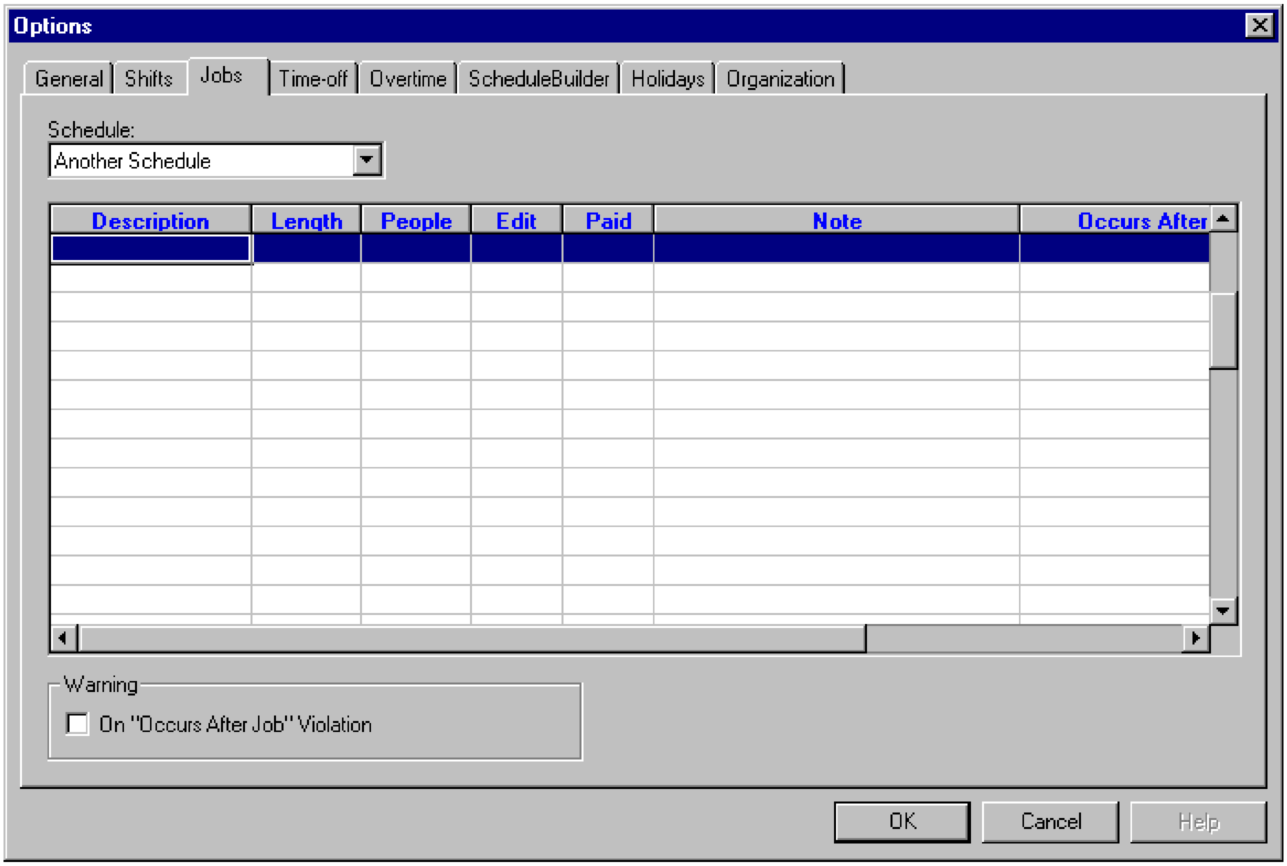
1. Click **Tools**=>**Options**.
2. Click the **Shifts** tab.
3. Under **Break Warnings**, select one or more check boxes.

Jobs tab

When you click Tools=>Options and click the Jobs tab, Figure 4 appears.

On the Jobs tab, you can specify jobs and job attributes.

Figure 4 Option window: Jobs tab



Adding, editing, and deleting jobs

To add a job:

1. Click **Tools**=>**Options**.
2. Click the **Jobs** tab.
3. In the **Schedule** list, select the schedule to which you will add a job.
4. In the **Description** column, click an empty field.
5. Type a name for the job to be added.
6. In the **Duration** column, type the time allotted for the break, or set the time using the spin boxes and the left and right arrow buttons on your keyboard.
7. In the **Occurs After Job** column, to change the order in which jobs are scheduled, select a job from the drop-down list.

To edit a job:

1. Click **Tools**=>**Options**.
2. Click the **Jobs** tab.
3. In the **Description** column, double-click the job to be edited.
4. Type the change.

To delete a job:

1. In the **Description** column, click the job to be deleted.
2. Press **Delete**.

Setting job warnings

To set a job warning:

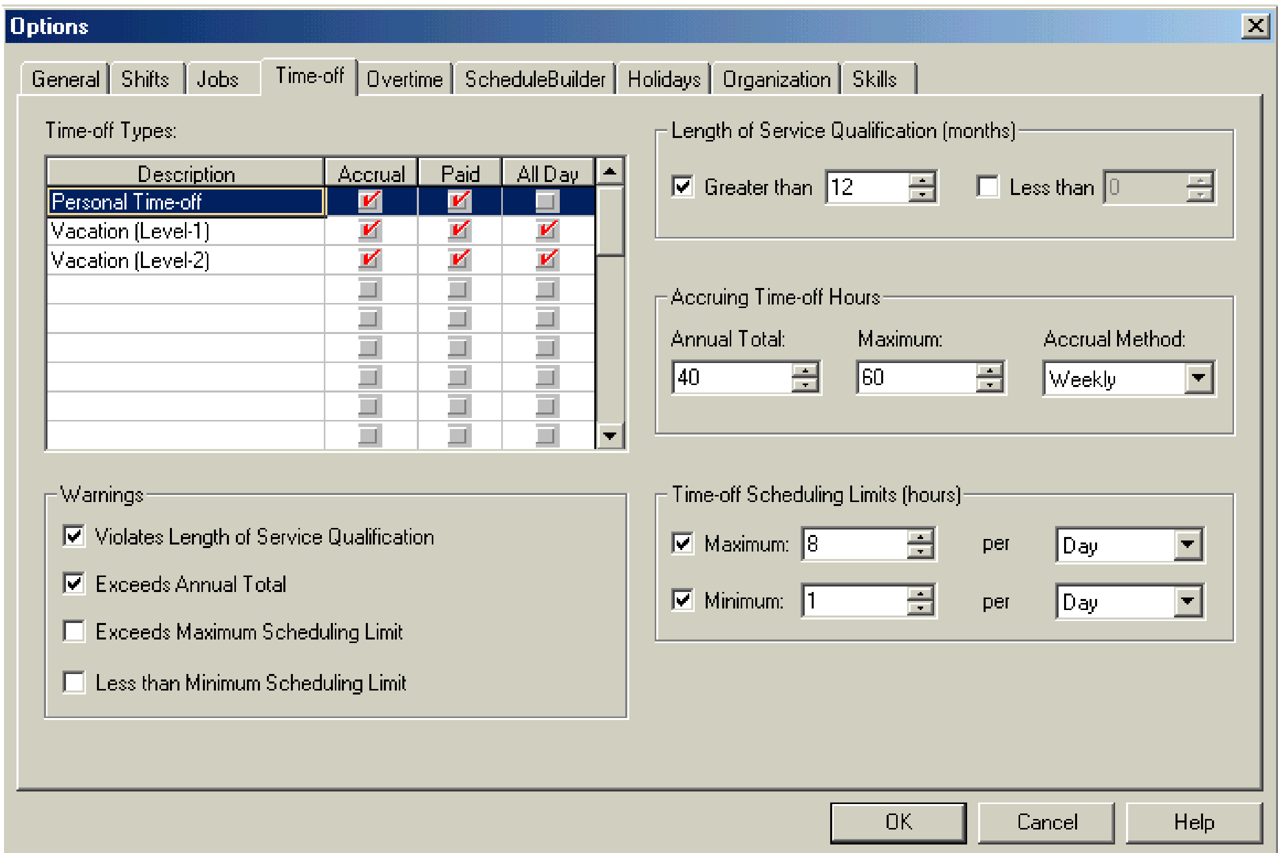
1. Click **Tools**=>**Options**.
2. Click the **Jobs** tab.
3. Under **Warnings**, select one or more check boxes.
4. Click **OK**.

Time-off tab

When you click Tools=>Options, and click the Time-off tab, Figure 5 appears.

On the Time-off tab, you specify time-off types and attributes.

Figure 5 Option window: Time-off tab



Adding, editing, and deleting time-offs

To add a time-off type:

1. Click **Tools**=>**Options**.
2. Click the **Time-off** tab.
3. Under **Time-off Types**, click an empty field.
4. Type a name for the time-off type to be added.
5. Select the **Accrual** check box to specify eligibility for accruing hours.
6. Select the **Paid** check box to specify eligibility for payment.
7. Select the **All Day** check box to specify if the type of time-off accounts for an entire day.

To edit a time-off:

1. Click **Tools**=>**Options**.
2. Click the **Time-off** tab.
3. Under **Time-off Types**, double-click the time-off type to be edited.
4. Type the change.

To delete a time-off:

1. Under T**ime-off Types**, click the time-off type to be deleted.
2. Press **Delete**.

Setting the length of service

To set the length of service required to qualify for a time-off:

1. Click **Tools**=>**Options**.
2. Click the **Time-off** tab.
3. Under **Time-off Types**, select a time-off type.
4. Under **Length of Service Qualification (months)**, select the **Greater than** check box and type or select a number for the minimum number of months of service required to be eligible for this type of time-off.
5. Under **Length of Service Qualification (months)**, select the **Less than** check box and type or select a number for the maximum number of months of service required to be eligible for this type of time-off.

Setting the accruing time-off hours

To set the accruing time-off hours:

1. Click **Tools**=>**Options**.
2. Click the **Time-off** tab.
3. Under **Time-off Types**, select a time-off type.
4. Under **Accruing Time-off Hours** in the **Annual Total** box, type or select the annual total of accrued hours for this type of time-off.
5. Under **Accruing Time-off Hours**, in the **Maximum box**, type or select the maximum number of accrued hours for this type of time-off.
6. Under **Accruing Time-off Hours**, in the Accrual Method list, select the accrual frequency.

Setting time-off warnings

To set time-off warnings:

1. Click **Tools**=>**Options**.
2. Click the **Time-off** tab.
3. In the **Warnings** group, select one or more check boxes.

Setting time-off scheduling limits

To set time-off scheduling limits:

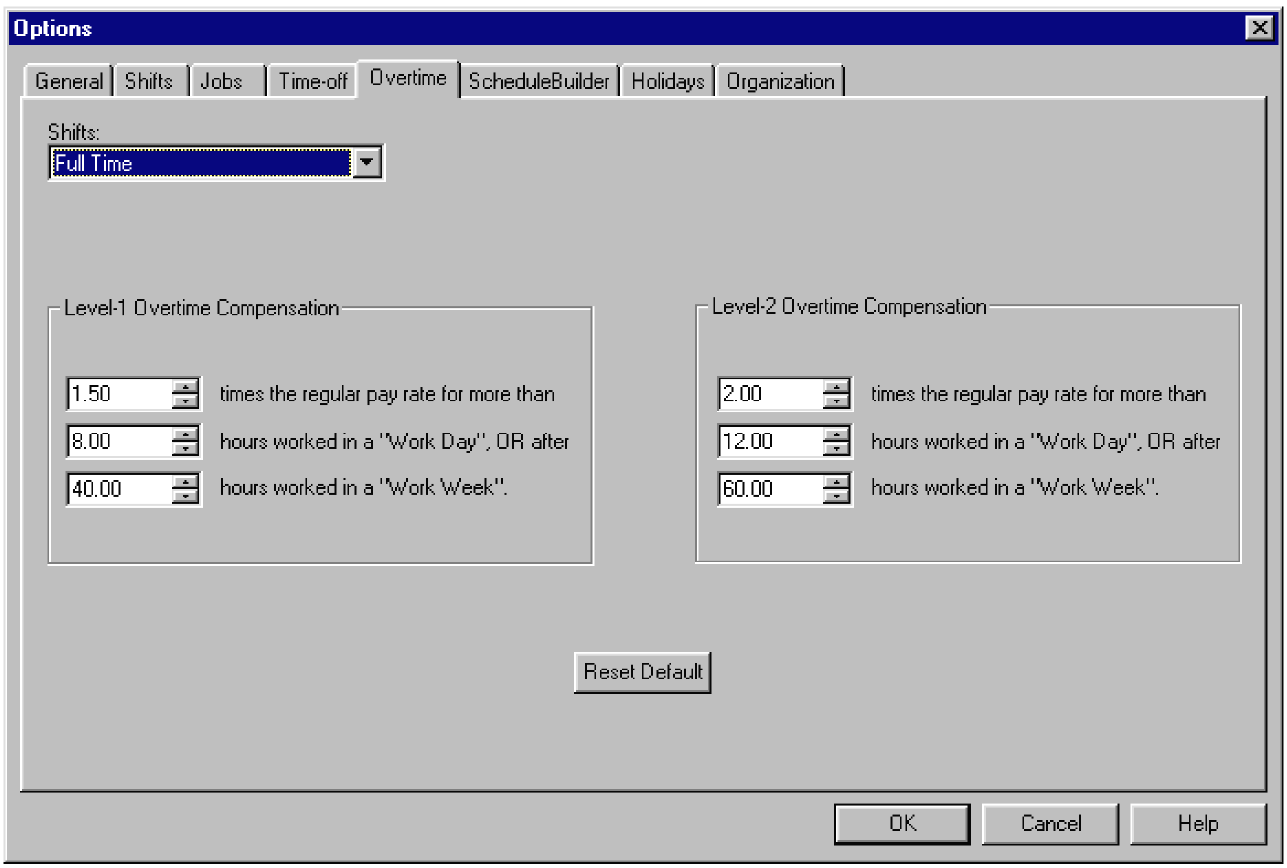
1. Click **Tools**=>**Options**.
2. Click the **Time-off** tab.
3. Under **Time-off Types**, select a time-off type.
4. Under **Time-off Scheduling Limits (hours)**, select the **Maximum** check box and type or select a number for the maximum number of hours of time-off scheduling for this type of time-off.
5. Under **Time-off Scheduling Limits (hours)**, select the **Minimum** check box and type or select a number for the minimum number of hours of time-off scheduling for this type of time-off.
6. Specify whether the time-off scheduling for this type of time-off is on a daily or weekly basis.

Overtime tab

When you click Tools=>Options and click the Overtime tab, Figure 6 appears.

On the Overtime tab, you can specify overtime compensation for shifts.

Figure 6 Options window: Overtime tab



Setting the overtime pay rate

To set the overtime pay rate:

1. Click **Tools**=>**Options**.
2. Click the **Overtime** tab.
3. Under **Shift Type**, select a shift type.
4. Under **Level-1 Overtime Compensation**, type or select the multiplier of the regular pay rate.
5. Type or select the number of hours in a work day after which overtime occurs.
6. Under **Level-2 Overtime Compensation**, type or select the multiplier of the regular pay rate.
7. Type or select the number of hours in a work week after which overtime occurs.

Resetting the overtime pay rate setting to the default

To reset the overtime pay rate setting to the default:

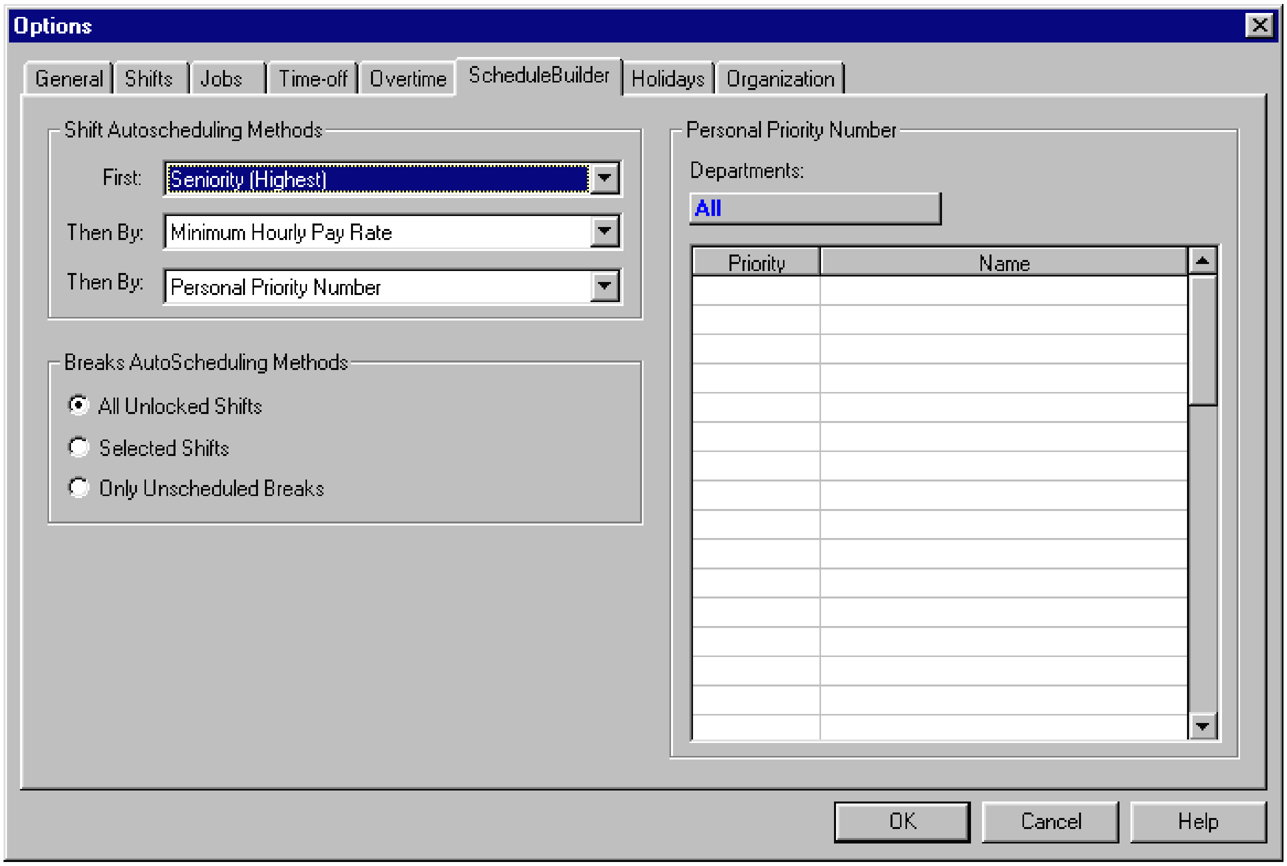
1. Click **Tools**=>**Options**.
2. Click the **Overtime** tab.
3. Under **Shift Type**, select a shift type.
4. Click **Reset Default**.

ScheduleBuilder tab

When you click Tools=>Options Window and click the ScheduleBuilder tab, Figure 7 appears.

On the ScheduleBuilder tab, you can prioritize the criteria used to create schedules, and specify automated scheduling parameters.

Figure 7 Options window: ScheduleBuilder tab



Setting automatic scheduling for shifts

To set automatic scheduling for shifts:

1. Click **Tools=>Options**.
2. Click the **ScheduleBuilder** tab.
3. Under **Shifts Autoscheduling Methods**, select an entry in the **First** list.
4. Under **Shifts Autoscheduling Methods**, select an entry in the two **Then By** lists.

Adding, editing, and deleting personal priority numbers

To add a personal priority number:

1. Click **Tools**=>**Options**.
2. Click the **ScheduleBuilder** tab.
3. Under **Departments**, click **All** and select a department or select all departments.
4. In the **Priority** column, double-click the cell adjacent to the person who requires the personal priority number, and type or select a personal priority number.

To edit a personal priority number:

1. Under **Departments**, click **All** and select a department or select all departments.
2. In the **Priority** column, double-click a number and type or select a new number.

Setting automatic scheduling for breaks

To set automatic scheduling for breaks:

1. Click **Tools**=>**Options**.
2. Click the **ScheduleBuilder** tab.
3. Under **Breaks Autoscheduling Methods**, select an automatic scheduling method.

To delete a personal priority number:

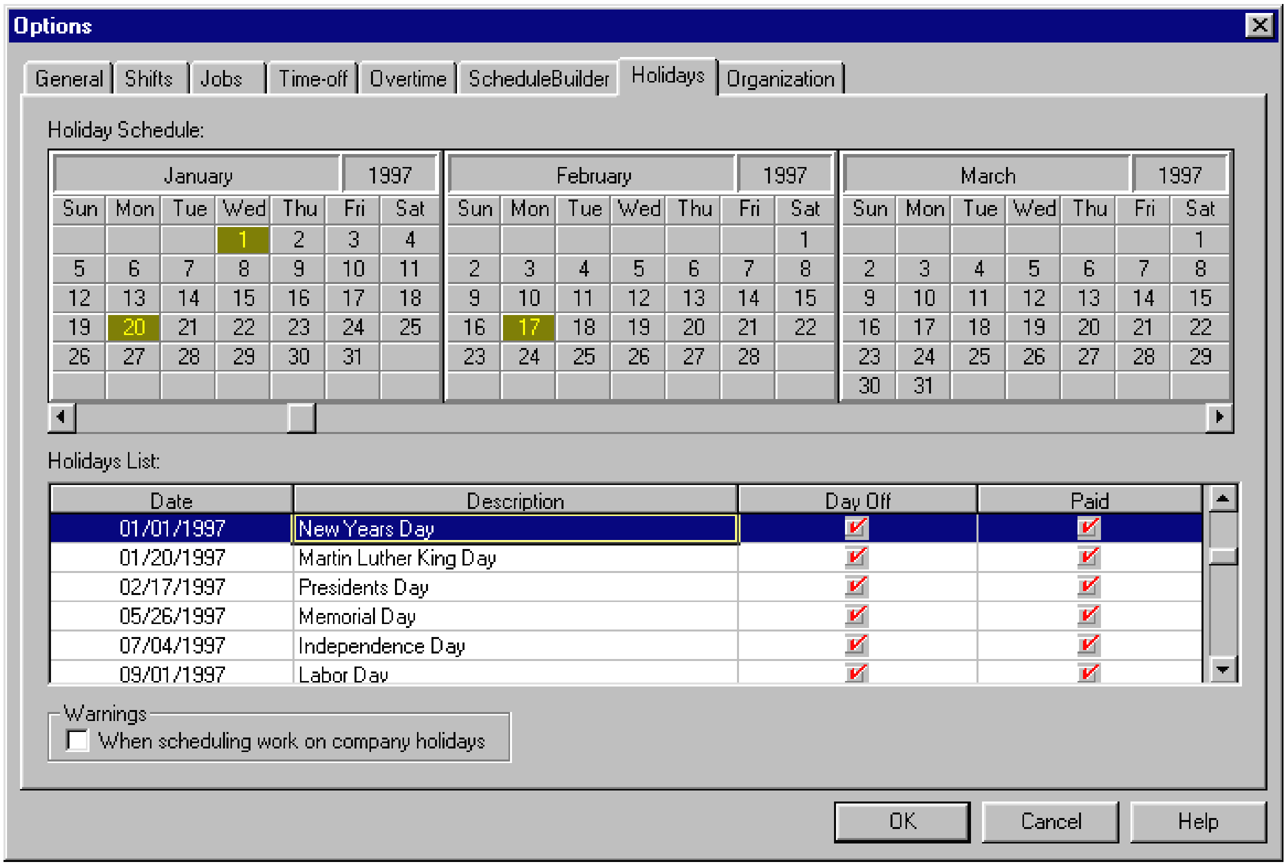
1. Under **Departments**, click **All** and select a department or select all departments.
2. In the **Priority column**, click a number and press **Delete**.

Holidays tab

When you click Tools=>Options Window and click the Holidays tab Figure 8 appears.

On the Holidays tab, you can specify holidays and view them.

Figure 8 Options window: Holidays tab



Adding, editing, and deleting holidays

To add a holiday:

1. Click **Tools**=>**Options**.
2. Click the **Holidays** tab.
3. Under **Holiday Schedule**, click a date for the holiday, or under **Holidays List**, double-click an empty cell in the **Date** column and click a date for the holiday.
4. In the **Description** column, type a name for the holiday.
5. Select the **Day Off** check box if the holiday is considered to be a day off.
6. Select the **Paid** check box if the holiday is considered to be a paid holiday.
7. Under **Warning**, select the **When Scheduling Work on Company Holidays** check box to receive a warning if you attempt to schedule people on company holidays.

To edit a holiday:

1. Under **Holiday Schedule**, double-click the date to be edited.
2. Under **Holidays List**, type the change.

To delete a holiday:

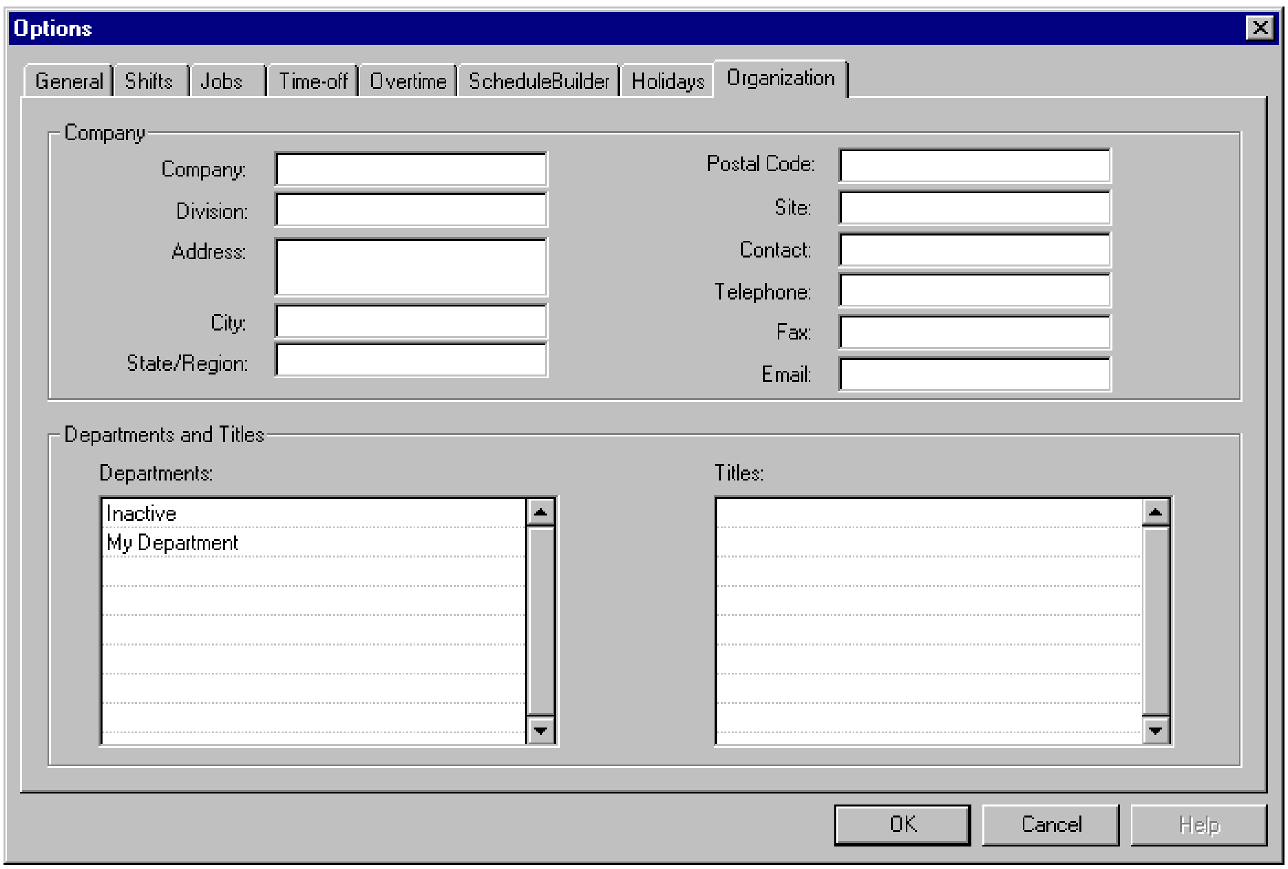
1. Under **Holiday Schedule**, or under **Holidays List**, click the date to be deleted.
2. Press **Delete**.

Organization tab

When you click Tools=>Options Window and click the Organization tab, Figure 9 appears.

On the Organization tab, you can specify company contact information, and company departments and job titles.

Figure 9 Options window: Organization tab



Changing company information

To change company information:

1. Click **Tools**=>**Options**.
2. Click the **Organization** tab.
3. In the **Company** group, click a field and type the change, or under **Departments**, **Work Groups**, or **Titles**, double-click a field and type the change.

Adding, editing, and deleting departments

To add a department:

1. Click **Tools**=>**Options**.
2. Click the **Organization** tab.
3. Under **Departments**, click an empty cell and type a name for the department.

To edit a department:

1. Under **Departments**, double-click the department to be edited.
2. Type the change.

To delete a department:

NOTE: Deleting a department deletes all of the employees in the department.

1. Under **Departments**, click a department.
2. Press **Delete** and click **OK**.

Adding, editing, and deleting job titles

To add a job title:

1. Click **Tools**=>**Options**.
2. Click the **Organization** tab.
3. Under **Titles**, click an empty cell and type a name for the title.

To edit a job title:

1. Under **Titles**, double-click the title to be edited.
2. Type the change.

To delete a job title:

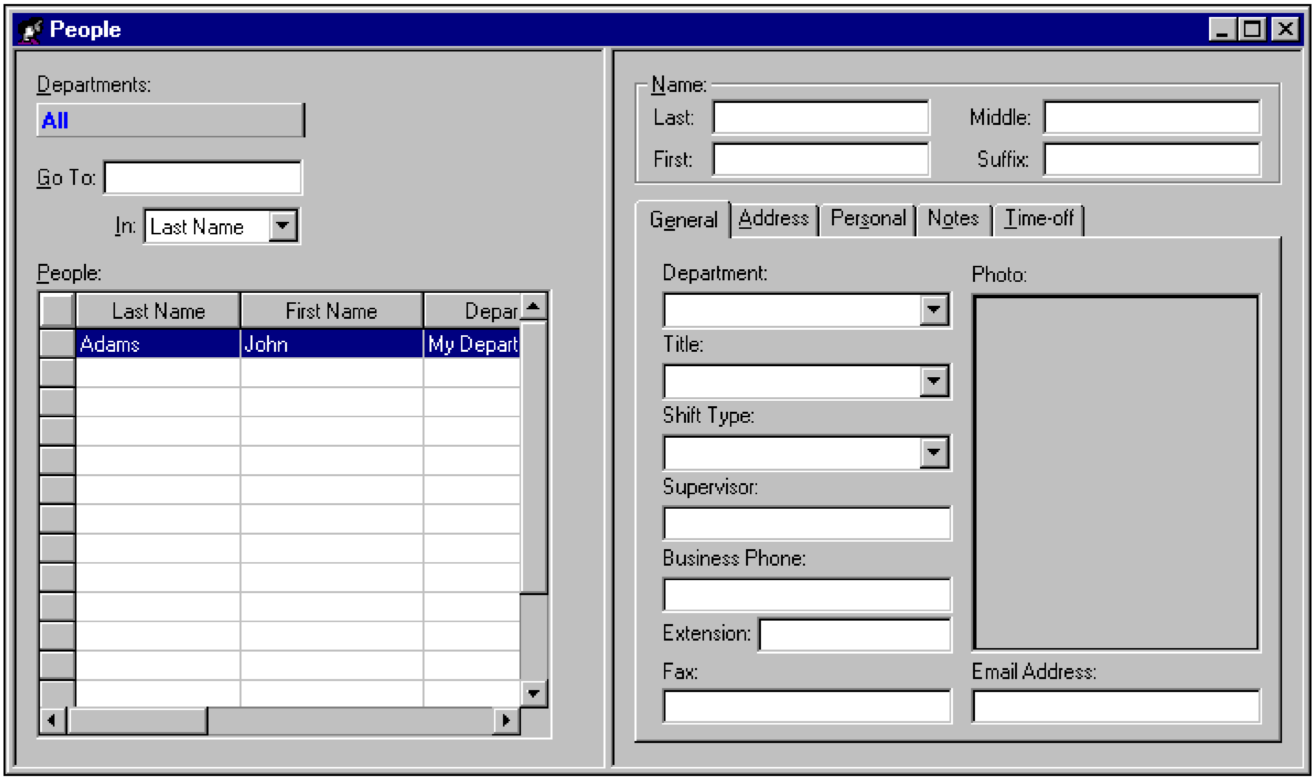
1. Under **Titles**, click a title.
2. Press **Delete**.

People window

You can add your employees information and skills with the People Window. Information includes: identification, address, payroll, and vacation information. Skills include: a language such as Spanish or French, a degree, or experience. These skills can then be matched with skills required for each job.

When you click Window=>People Window, Figure 10 appears.

Figure 10 People window: General tab



Adding people

You can add people to 6120 CCS from the People window or the Scheduler window.

To add a person on the People window:

1. Click **Insert**=>**Person**.

Specify a first and last name, department, title, shift type, supervisor, business phone number, extension number, fax number, and e-mail address for the person.

2. Click **OK**.

To add a person on the People window:

3. Click **Insert**=>**Person**.

Specify a first and last name, department, title, shift type, supervisor, business phone number, extension number, fax number, and e-mail address for the person.

General tab

On the General tab, you add identification information for people.

Changing employee information

To change employee information:

1. Click **Window**=>**People Window**.
2. Under **Departments**, click **All** and select one or more departments.
3. Under **People** (or on the General tab), click an information field for a person and click the down arrow to select a category of information.
4. Click another person's name to save the change.

Adding photos

To add a photo:

1. Click **Window**=>**People Window**.
2. Under **Departments**, click **All** and select a department or select all departments.
3. In the **People** list, right-click a person and click **Load Photo**.
4. In the **Load Photo** dialog box, browse to the folder that contains the photo and select it.

Locating people in the People window

To locate a person in the People window:

1. Click **Window**=>**People Window**.
2. Under **Departments**, click **All** and select one or more departments.
3. In the **In** list, select **First Name** or **Last Name**.
4. In the **Go To** box, start typing the person's first or last name.

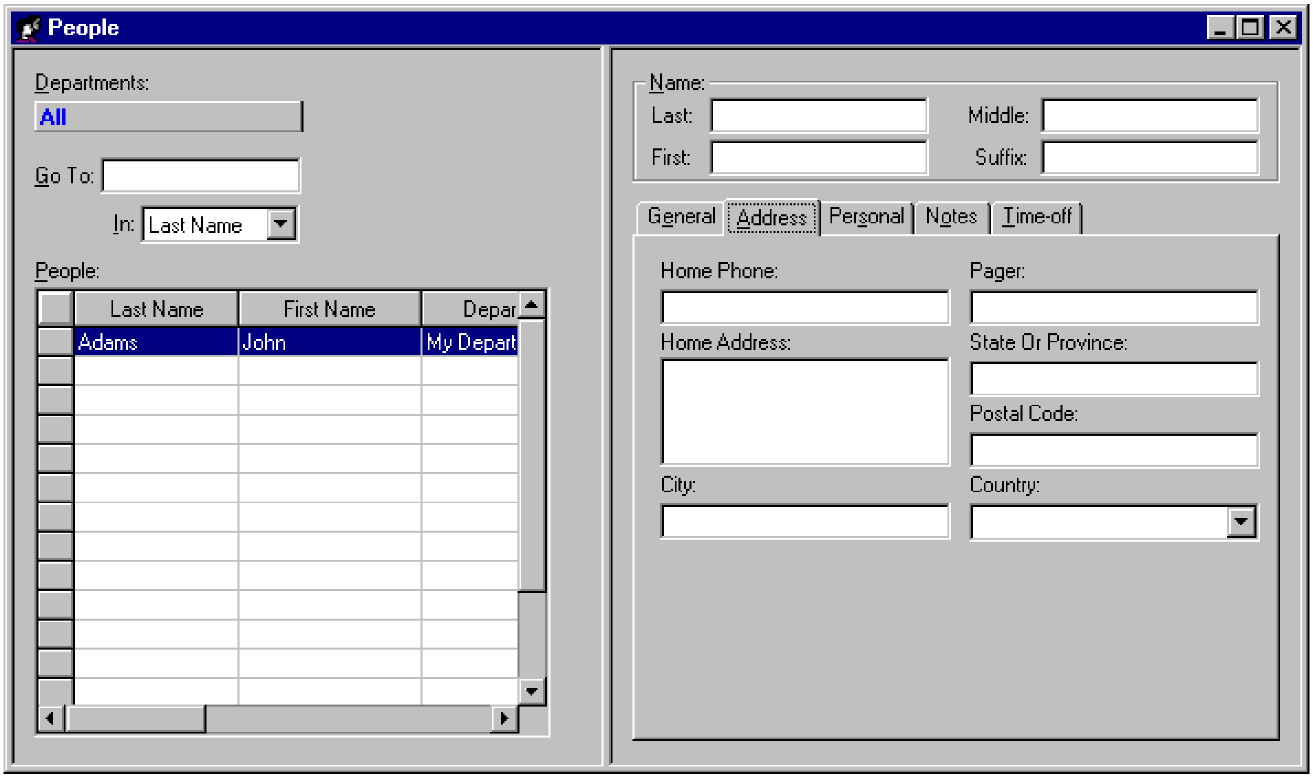
6120 CCS highlights the person’s name in the Last Name column.

Address tab

When you click Window=>People Window and click the Address tab, Figure 11 appears.

On the Address tab, you add addresses for people.

Figure 11 People window: Address tab



Adding address information

To add an address:

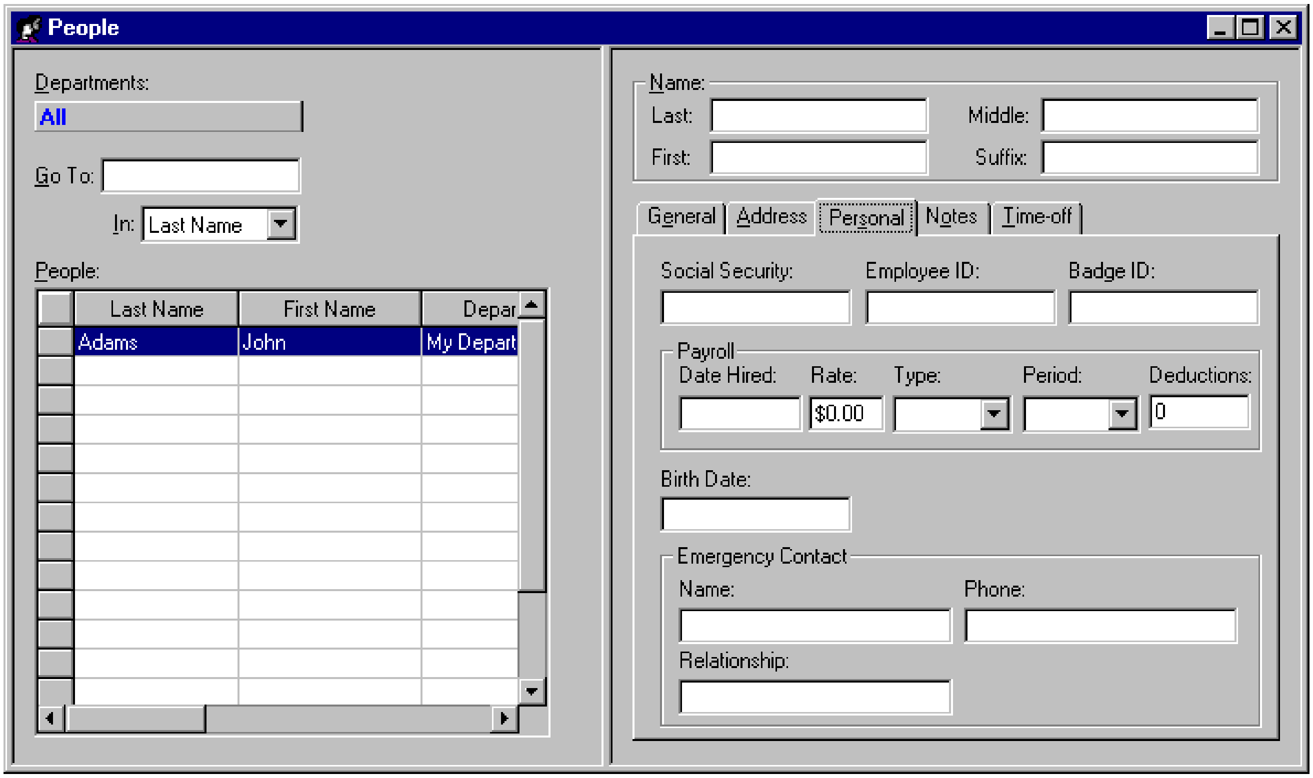
1. Click **Window**=>**People Window**.
2. Under **Departments**, click **All** and select one or more departments.
3. Click the **Address** tab.
4. In the left pane under **People**, select a person.
5. On the **Address** tab, click each field in turn and specify a home phone number, street address, city, pager number, state or province, postal code, and country for the person.

Personal tab

When you click Window=>People Window and click the Personal tab, Figure 12 appears.

On the Personal tab, you add payroll and emergency contact information for people.

Figure 12 People window: Personal tab



Adding personal information

To add personal information:

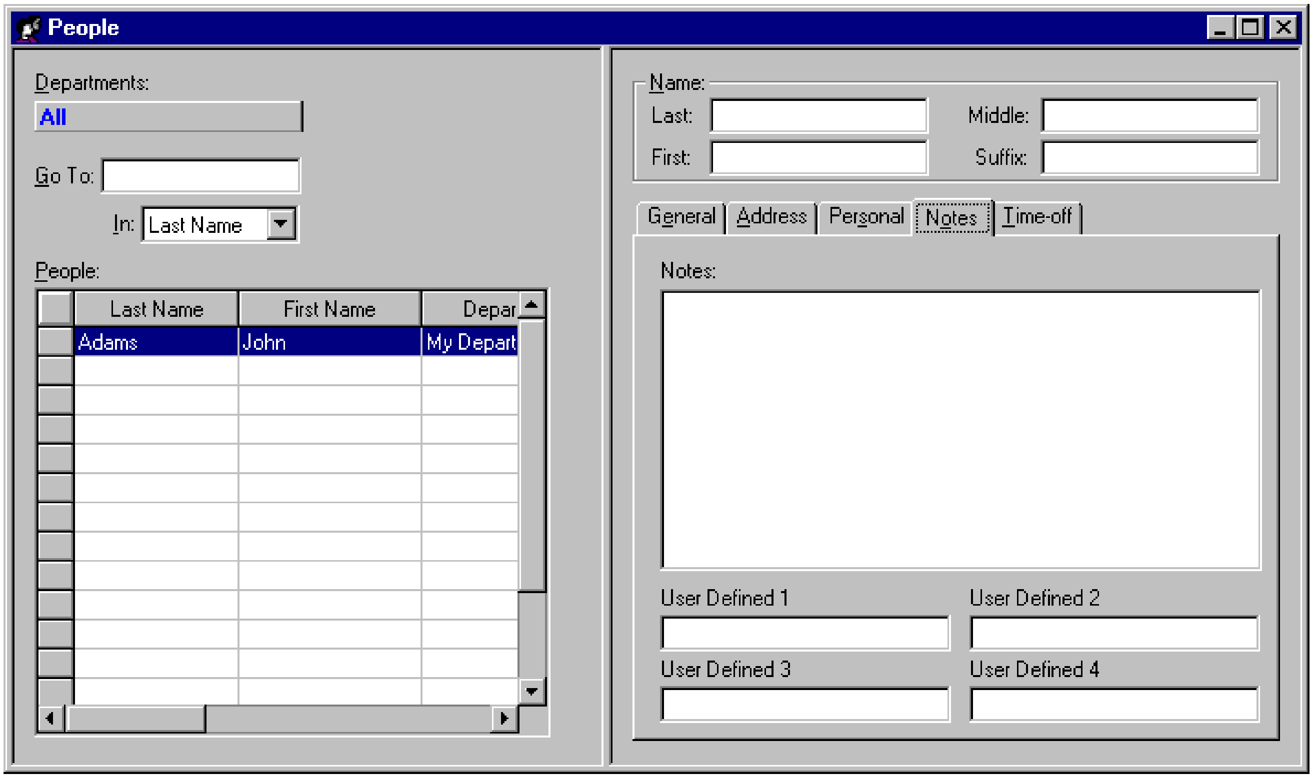
1. Click **Window**=>**People Window**.
2. Under **Departments**, click **All** and select one or more departments.
3. Click the **Personal** tab.
4. In the left pane under **People**, select a person.
5. On the **Personal** tab, click each field in turn and specify a social security number, employee ID, badge ID, payroll information, a birth date, and emergency contact information for the person.

Notes tab

When you click Window=>People Window and click the Notes tab, Figure 13 appears.

On the Notes tab, you add notes for people.

Figure 13 People window: Notes tab



Adding notes for people

To add notes for a person:

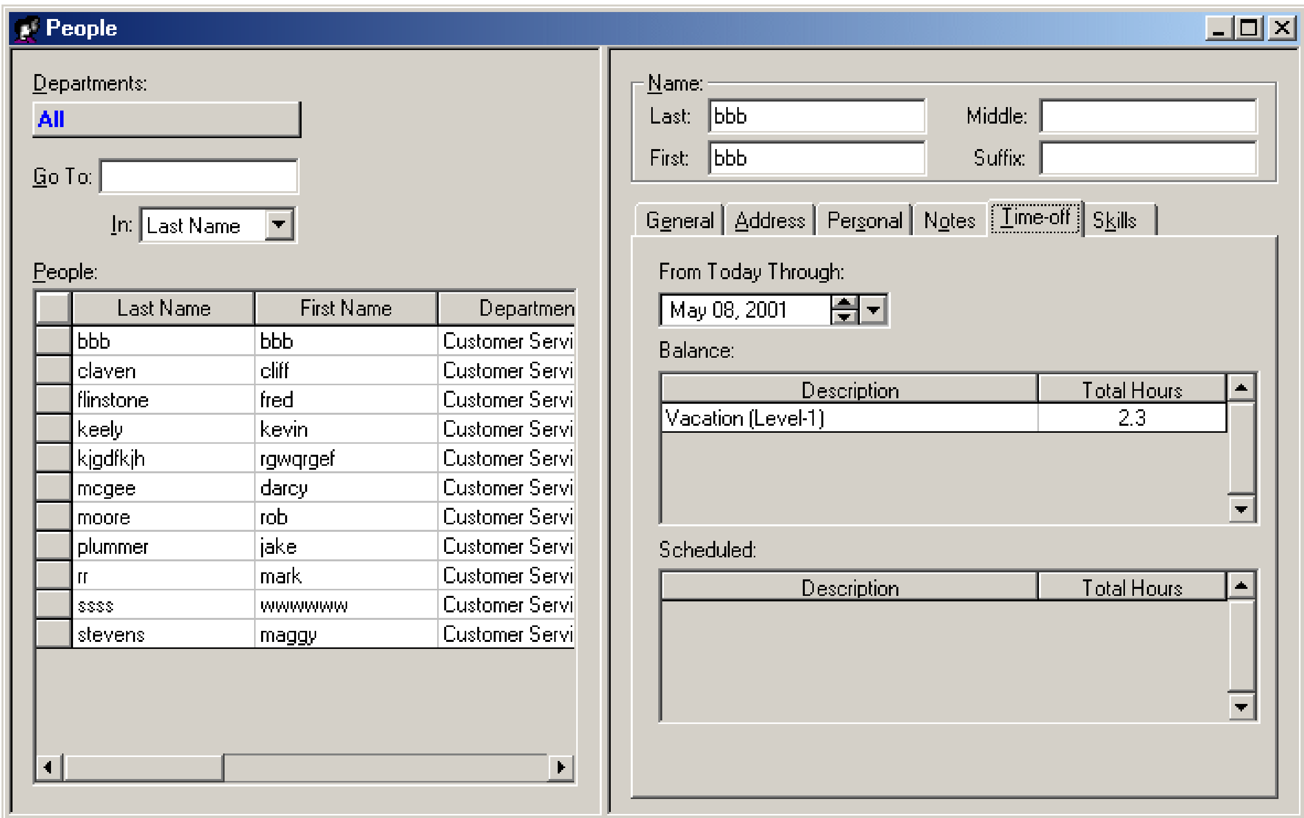
1. Click **Window=>People Window**.
2. Under **Departments**, click All and select one or more departments.
3. Click the **Notes** tab.
4. In the left pane under **People**, select a person.
5. On the **Notes** tab, type text.

Time-off tab

When you click Window=>People Window and click the Time-off tab, Figure 14 appears.

On the Time-off tab, you specify time-off types and attributes.

Figure 14 People window: Time-off tab



Reviewing a person's time-off balance

To review a person's time-off balance:

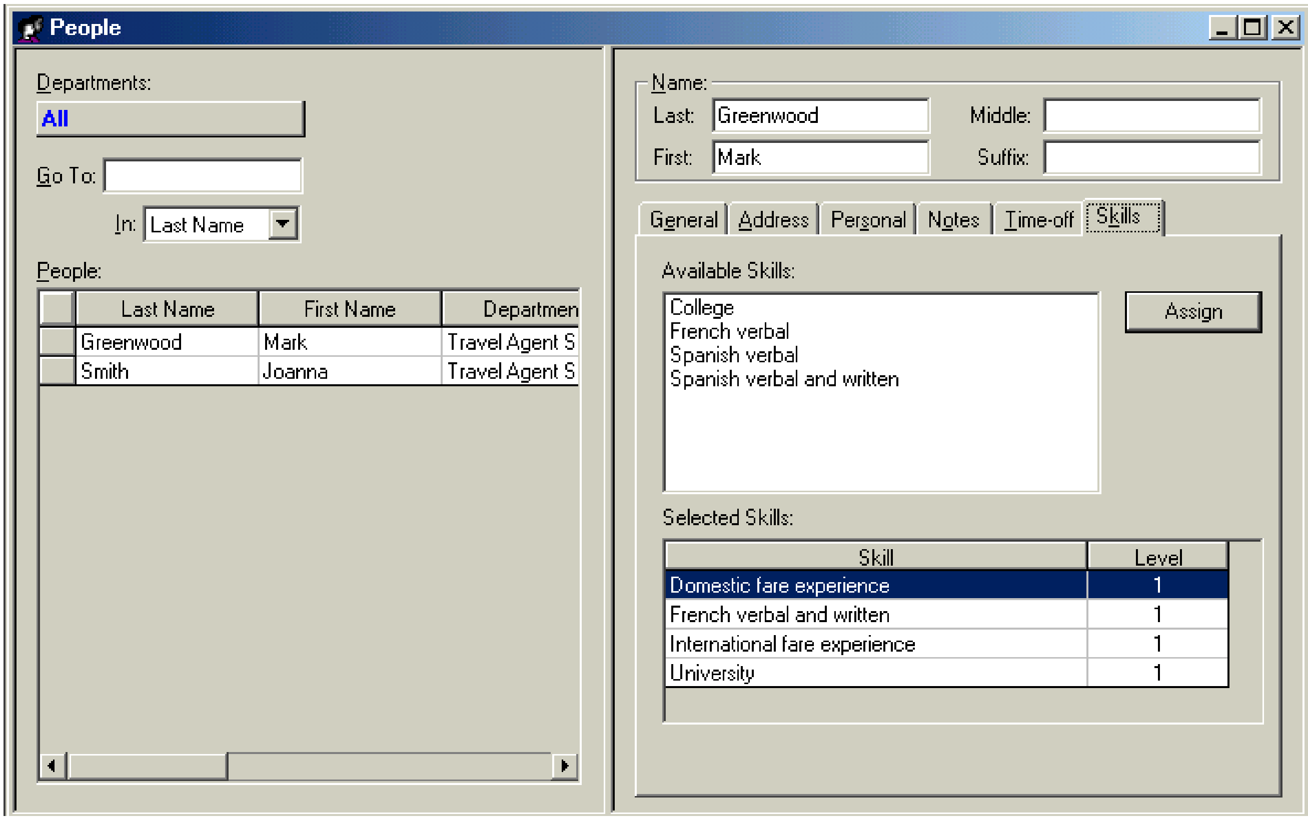
1. Click **Window**=>**People Window**.
2. Under **Departments**, click **All** and select one or more departments.
3. Click the **Time-off** tab.
4. In the **People** list, select a person.
5. In the **From Today Through** box, select a date.
6. Under **Balance**, 6120 CCS displays time-off information for the person.

Skills tab

When you click Window=>People Window and click the Skills tab, Figure 15 appears.

On the Skills tab, you specify employees skills.

Figure 15 People window: Skills tab



Adding an employee's skills

To add an employee's skills:

1. Click **Window=>People Window**.
2. Under **Departments**, click **All** and select one or more departments.
3. Click the **Skills** tab.
4. In the **People** list, select a person.
5. In the **Available Skills** list, select skill.
6. Click **Assign**.

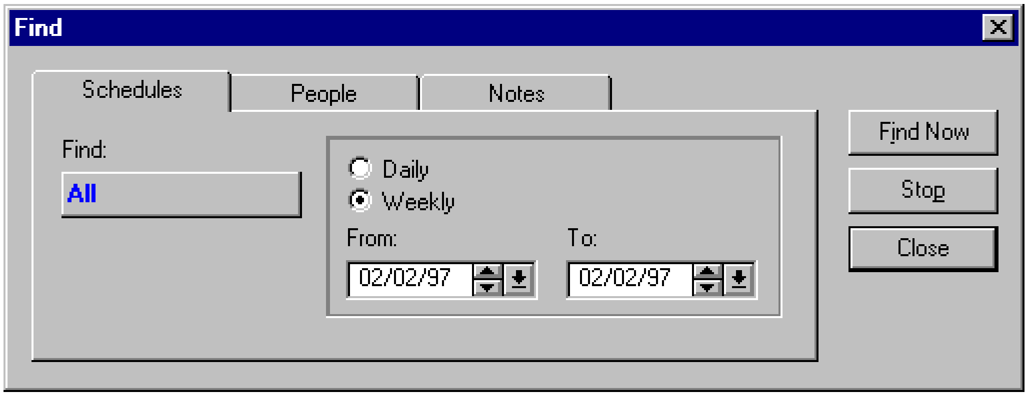
The skill will appear in the Selected Skills list.

Find window

When you click Edit=>Find, Figure 16 appears.

The Find window consists of three tabs you can use to search for schedules, people, and jobs.

Figure 16 Find window: Schedules tab



Schedules tab

On the Schedules tab, you can search for daily or weekly schedules for a particular date range.

Finding schedules

To find a schedule:

1. Click **Edit**=>**Find**.
2. Click the **Schedules** tab.
3. Click **Daily** or **Weekly**.
4. In the **From** and **To** boxes, type or select dates.
5. Click **Find Now**.

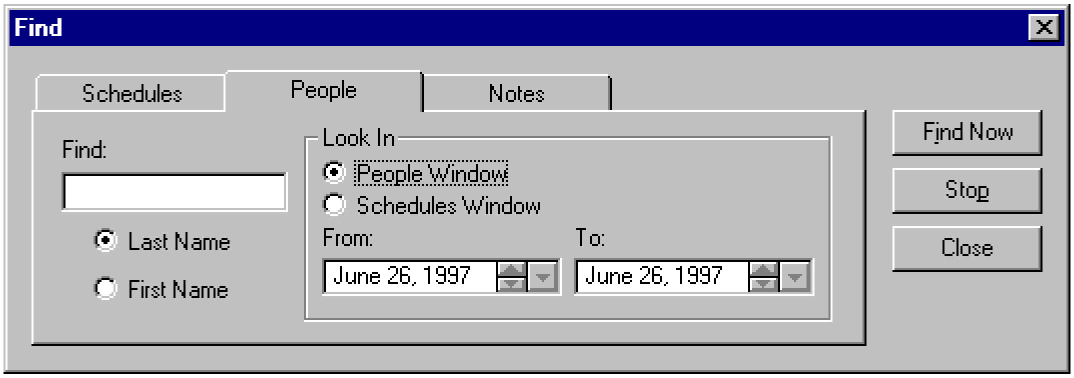
6120 CCS displays the schedules for the time period selected.

People tab

When you click Edit=>Find and click the People tab, Figure 17 appears.

On the People tab, you can search for people for a particular date range.

Figure 17 Find window: People tab



Finding people

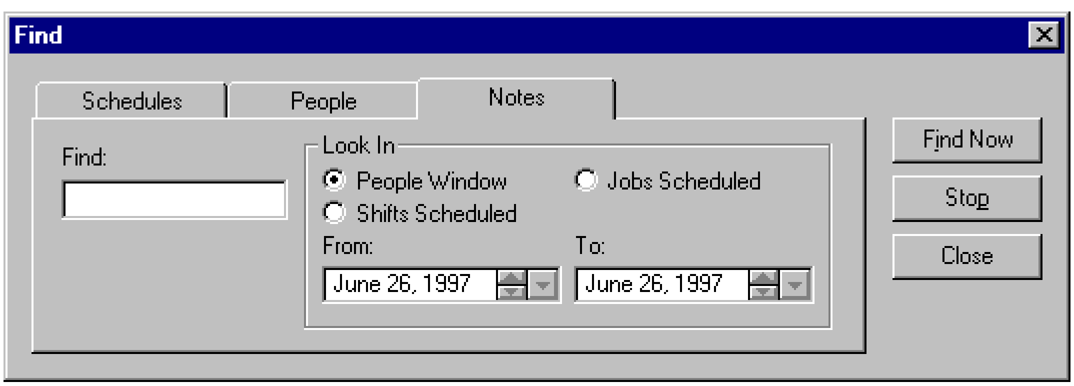
To find a person:

1. Click **Edit**=>**Find**.
2. Click the **People** tab.
3. Under **Find**, click **Last Name** or **First Name**.
4. In the **Find** box, type a person's name.
5. Under **Look In**, click **People Window** or **Schedules** Window.
6. In the **From** and **To** boxes, type or select dates.
7. Click **Find Now**.

Notes tab

When you click Edit=>Find and click the Notes tab, Figure 18 appears.

Figure 18 Find window: Notes tab



On the Notes tab, you can search for notes associated to shifts or jobs scheduled for a particular date range.

Finding notes

To find a note:

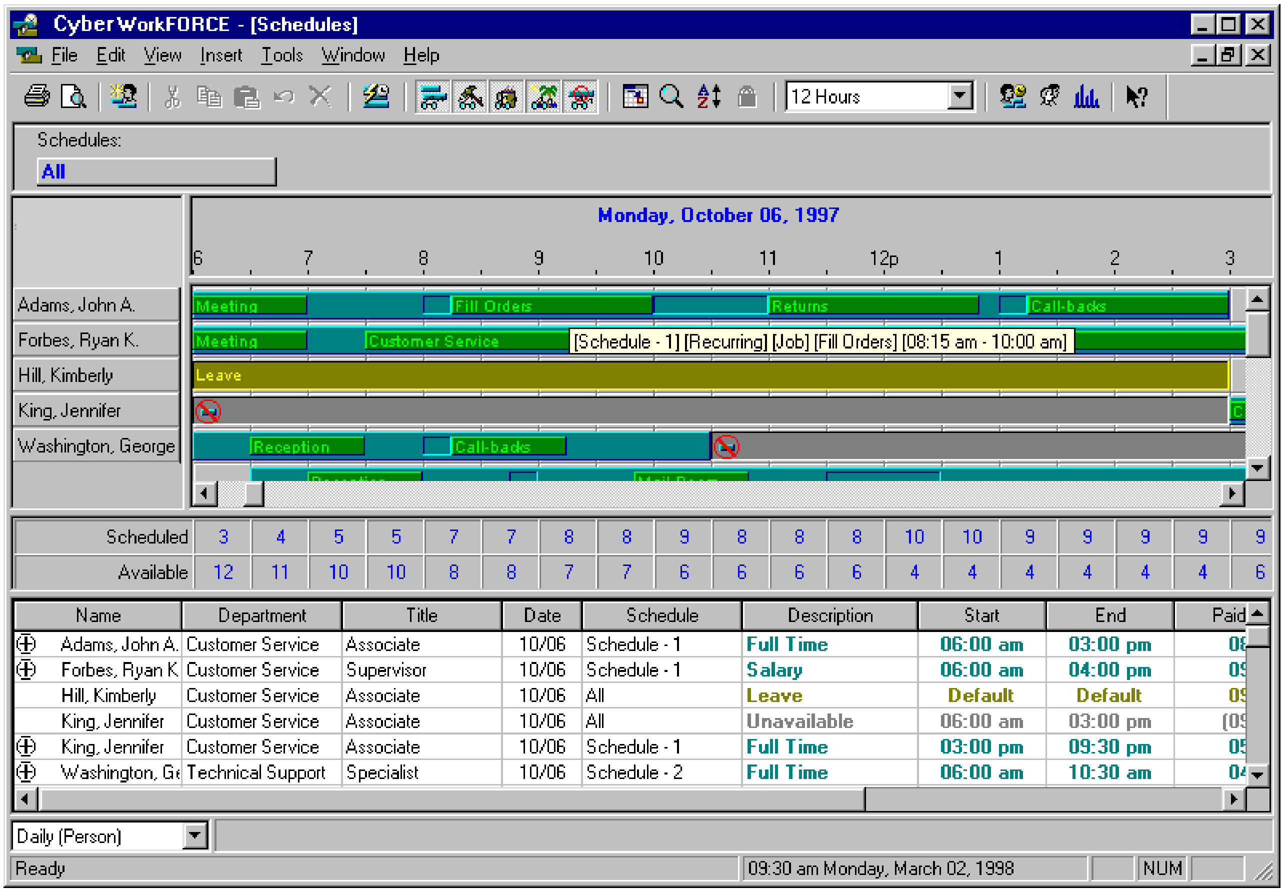
1. Click **Edit**=>**Find**.
2. Click the **Notes** tab.
3. In the **Find** box, type text to assist you in locating the note.
4. Under **Look In**, click **People Window**, **Shifts Scheduled** or **Job Scheduled**.
5. If you selected Shifts Scheduled or Jobs Scheduled, in the **From** and **To** boxes select dates.
6. Click **Find Now**.

Scheduler window

You can create the schedule with the Scheduler Window. You can adjust the shift or break times for people, and view the people forecast, scheduled, over/under, available, or on break.

When you click Window=>Scheduler Window, Figure 19 appears.

Figure 19 Scheduler window



Viewing events

To view an event:

1. Click **View**=>**Timebars** and click an event type (Shifts, Jobs, Breaks, Time-off, Unavailable) to view on the time bar display.
2. Repeat step 1 to view additional event types on the time bar display.

Adding events

Event types consist of Shifts, Jobs, Breaks, Time-off, and Unavailable.

Adding a shift

To add a shift:

1. Right-click the time bar display and click **Insert**=>**Shift**.

The Insert Shift screen appears.

2. On the **Insert Shift** dialog box, under **Schedule Name** select a schedule.
3. Under **Shift Type**, select a shift type.
4. On the time bar display, adjacent to the name of the person who needs a shift, click the start time for the shift and drag the time bar to the desired shift end time.

The shift you added to the time bar display is added automatically to the Schedules table.

Adding a job

To add a job:

1. On the time bar display, right-click a shift time bar and click **Insert**=>**Job**.

The Insert Job screen appears. If there are no jobs listed in the table, on the Options window under Jobs, define one or more job types.

2. On the **Insert Job** dialog box, under **Schedule Name** select a schedule.
3. On the time bar display, move the cursor over the shift to which you will associate the job.
4. Position the cursor at the desired start-time for the job, and left-click the time bar to embed the job in the shift.

The job you added to the shift time bar is added automatically to the Schedules table.

Adding a break

To add a break:

1. On the time bar display, right-click a shift time bar and click **Insert**=>**Break**.

The Insert Break screen appears. If there are no breaks listed in the table, on the Options window under Shifts, define one or more break types.

2. On the **Insert Break** dialog box, under **Shift Type** select a shift type.
3. On the time bar display, move the cursor over the shift to which you will associate the break.
4. Position the cursor at the desired start-time for the break, and left-click the time bar to embed the break in the shift.

The break you added to the time bar display is added automatically to the Schedules table.

Adding a time-off

To add a time-off:

1. On the time bar display, right-click a time bar and click **Insert**=>**Time-off**.

The Insert Time-off screen appears. If there are no Time-offs listed in the table, on the Options window under Time-off, define one or more time-off types.

2. On the **Insert Time-off** dialog box, under **Time-off Type** select a time-off type.

On the time bar display, adjacent to the name of the person who needs a time-off, click the start time for the time-off and drag the time bar to the desired time-off end time.

The time-off you added to the time bar display is added automatically to the Schedules table.

Adding an unavailable

To add an unavailable:

1. On the time bar display, right-click a time bar and click **Insert**=>**Unavailable**.

The Insert Unavailable screen appears.

2. On the time bar display, adjacent to the name of the person who needs an unavailable, click the start time for the unavailable and drag the time bar to the desired unavailable end time.

The unavailable you added to the time bar display is added automatically to the Schedules table.

Editing events

Moving time bars

To move a time bar:

1. On the time bar display, click a shift time bar and release the mouse button.
2. Click the time bar a second time and move it to a new location using a drag-and-drop operation.

Any changes you make to the time bar display are duplicated automatically in the Schedules table.

Shortening and lengthening time bars

To shorten or lengthen a time bar:

1. On the time bar display, click a shift time bar and release the mouse button.
2. Move the cursor to either end of the shift time bar.

The cursor changes from a four-headed arrow to a double-headed arrow.

3. Click the end of the shift time bar and drag it to the left or right to lengthen or shorten it.

Editing events on the Schedules table

To edit an event on the Schedules table:

1. On the Schedules table, click the expansion box adjacent to the name of the person to be edited.
2. Double-click the Start or End cell for the event to be edited and edit the start or end time.

Making a shift recur

You can make a shift recur weekly, monthly, or yearly. In this example we will schedule a shift to recur daily.

To make a shift recur daily:

1. On the time bar display, right-click the time bar for the shift you will make recur daily.
2. Click **Make Recurring**=>**Daily Recurring**.

The Recurring dialog box opens. Under This occurs, Daily is selected. The days the shift will recur are highlighted in blue on the Recurring Dates calendar.

You can change the start and end times for a shift. You can specify how frequently the shift will recur, such as every day or every second day, and specify the date range over which the shift will recur.

3. Click **OK**.

Deleting events

To delete an event:

1. On the **Schedules** table, click an event and click **Edit**=>**Delete**, or right-click the event on the time bar display and click **Delete**.

Finding schedules and shifts

To find a schedule or shift:

1. Click **Edit**=>**Find**.

The Find dialog box appears.

2. Under **Find**, select a schedule or shift for the search.
3. Click **Daily** or **Weekly** for the schedule.
4. Under **From** and **To**, select from and to dates for the search.
5. Click **Find Now**.

Locking shifts

To lock a shift:

1. Click the shift time bar to be locked.
2. Click **Tools**=>**Lock**.

Using filters

Using filters, you can quickly locate people to display on the time bar and the Schedules table. A filter works likes a sieve, narrowing down your search for people.

You use filters in the Schedules, People, and Reports windows. You can enable up to four filters and create custom filters using user-defined fields.

Changing time periods

To change the time period viewed on the Schedules window time bar display:

1. Click **View**=>**Time Period**, and click **12 Hours**, **1 Day**, **2 Days**, **1 Week**, **2 Weeks**, or **1 Month**.

Changing a person's shift assignment

To change a person's shift assignment on the Schedules window:

1. On the time bar display, click the shift time bar to be changed.
2. Click **Tools**=>**Change**=>**Person**.
3. In the **Assign To** list, click the person to which you will assign the shift.
4. Click **OK**.

Changing a person's schedule assignment

To change a person's schedule assignment on the Schedules window:

1. In the **Schedules** table, select the shift to be changed by clicking its time bar or highlighting its time cell.
2. Click **Tools**=>**Change**=>**Schedule Assignment**.
3. In the **Assign To** list, click the schedule to which you will assign the shift.
4. Click **OK**.

Changing a person's shift type

To change a person's shift type on the Schedules window:

1. In the **Schedules** table, select the shift to be changed by clicking its time bar or highlighting its time cell.
2. Click **Tools**=>**Change**=>**Shift type**.
3. In the **Assign To** list, click the shift type to which you will assign the shift.
4. Click **OK**.

Adding and removing columns in the Schedules table

To add columns to the Schedules table:

1. Click **View**=>**Columns**=>**Custom**.

The Custom Columns screen appears.

2. Under **Available fields**, click a field and click **Add**.

To remove columns from the Schedules table:

1. Under **Show these columns**, click the field to be deleted and click **Remove**.
2. Click **OK**.

Setting schedule totals

To set schedule totals on the Schedules window:

1. Click **View**=>**Totals**.

The View Totals screen appears.

2. Click the **Display Hours Totals** check box.
3. Click **OK**.

Sorting events

To sort events:

1. Click **View**=>**Sort Events**.
2. Under **Sort By**, select a field to sort and click **Ascending** or **Descending**.
3. Under **Then By**, optionally select second and third fields to sort and click **Ascending** or **Descending**.
4. Click **OK**.

6120 CCS displays the time bars and corresponding time cells in the order selected.

Viewing people totals

To view people totals on the Schedules window:

1. Click **View**=>**Totals**.
2. Under **Event Totals**, click one or more check boxes.
3. Click **OK**.

Updating or editing time-off

To update the time-off parameter:

1. Click **Tools**=>T**ime-off Balance**=>**Update**.

To edit the time-off parameter:

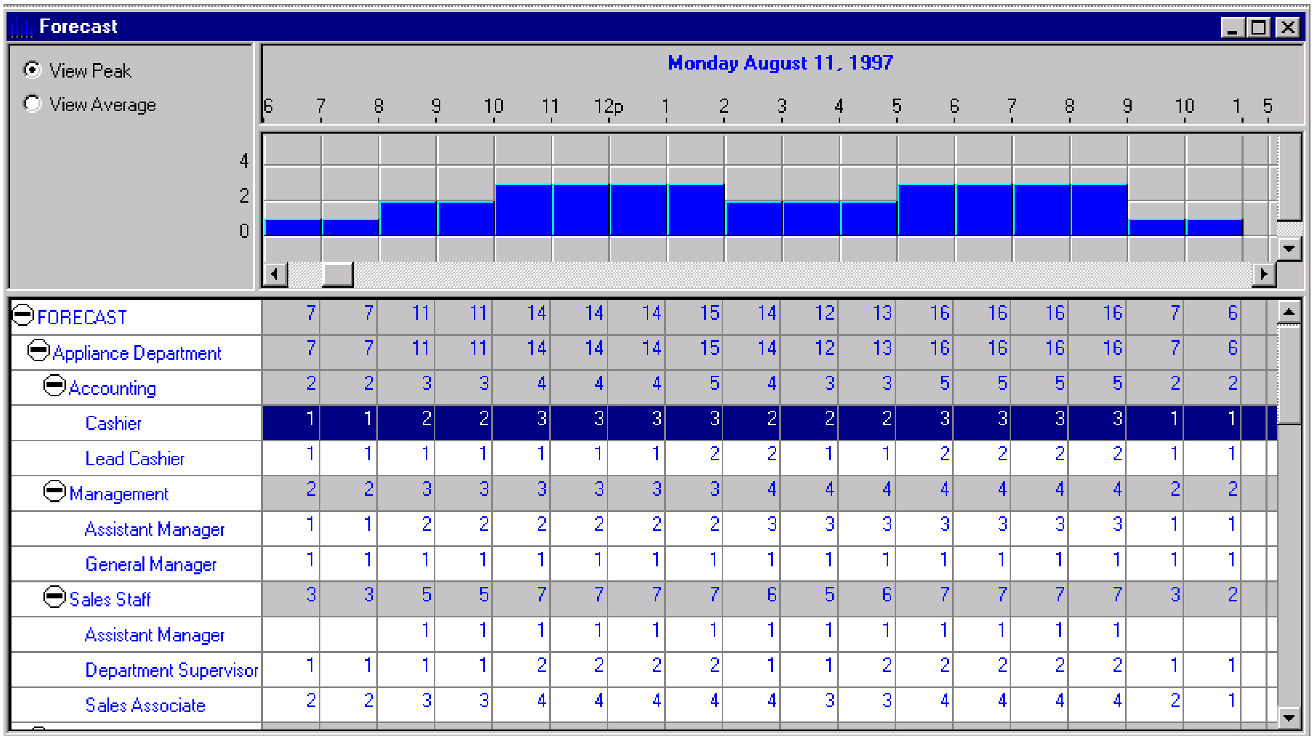
2. Click **Tools**=>**Time-off Balance**=>**Edit**.
3. Double-click the **Description** or **Total Hours** cell opposite the name of the person to be edited.
4. Click **OK**.

Forecast window

You can create and view the proposed schedule with the Forecast Window.

When you click Window=>Forecast Window, Figure 20 appears.

Figure 20 Forecast window



	6	7	8	9	10	11	12p	1	2	3	4	5	6	7	8	9	10
FORECAST	7	7	11	11	14	14	14	15	14	12	13	16	16	16	16	7	6
Appliance Department	7	7	11	11	14	14	14	15	14	12	13	16	16	16	16	7	6
Accounting	2	2	3	3	4	4	4	5	4	3	3	5	5	5	5	2	2
Cashier	1	1	2	2	3	3	3	3	2	2	2	3	3	3	3	1	1
Lead Cashier	1	1	1	1	1	1	1	2	2	1	1	2	2	2	2	1	1
Management	2	2	3	3	3	3	3	3	4	4	4	4	4	4	4	2	2
Assistant Manager	1	1	2	2	2	2	2	2	3	3	3	3	3	3	3	1	1
General Manager	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Sales Staff	3	3	5	5	7	7	7	7	6	5	6	7	7	7	7	3	2
Assistant Manager			1	1	1	1	1	1	1	1	1	1	1	1	1		
Department Supervisor	1	1	1	1	2	2	2	2	1	1	2	2	2	2	2	1	1
Sales Associate	2	2	3	3	4	4	4	4	4	3	3	4	4	4	4	2	1

Creating a schedule forecast

To create a schedule forecast:

1. Click **Window=>Forecast Window**.
2. On the toolbar, click the **Calendar** button and select the date for the forecast.
3. On the **Forecast** table, click the expansion box adjacent to the shift used in the forecast.

⊕ Morning Shift

When you expand the tree, 6120 CCS displays departments, working groups, and employee titles.

Morning Shift	2	1	3	3	1	3	3	3	2	1	0	0
Customer Service	2	1	3	3	1	3	3	3	2	1	0	0
Common Workgroup	2	1	3	3	1	3	3	3	2	1	0	0
Customer Service Rep												
Quality Assurance Rep	2	1	3	3	1	3	3	3	2	1	0	0
Telemaking Rep												

4. Click an employee title, such as Quality Assurance Rep.

The Forecast chart displays the number of quality assurance representatives forecast across one hour time intervals for the day.

5. On the **Forecast** table, optionally change the number of employees forecast.

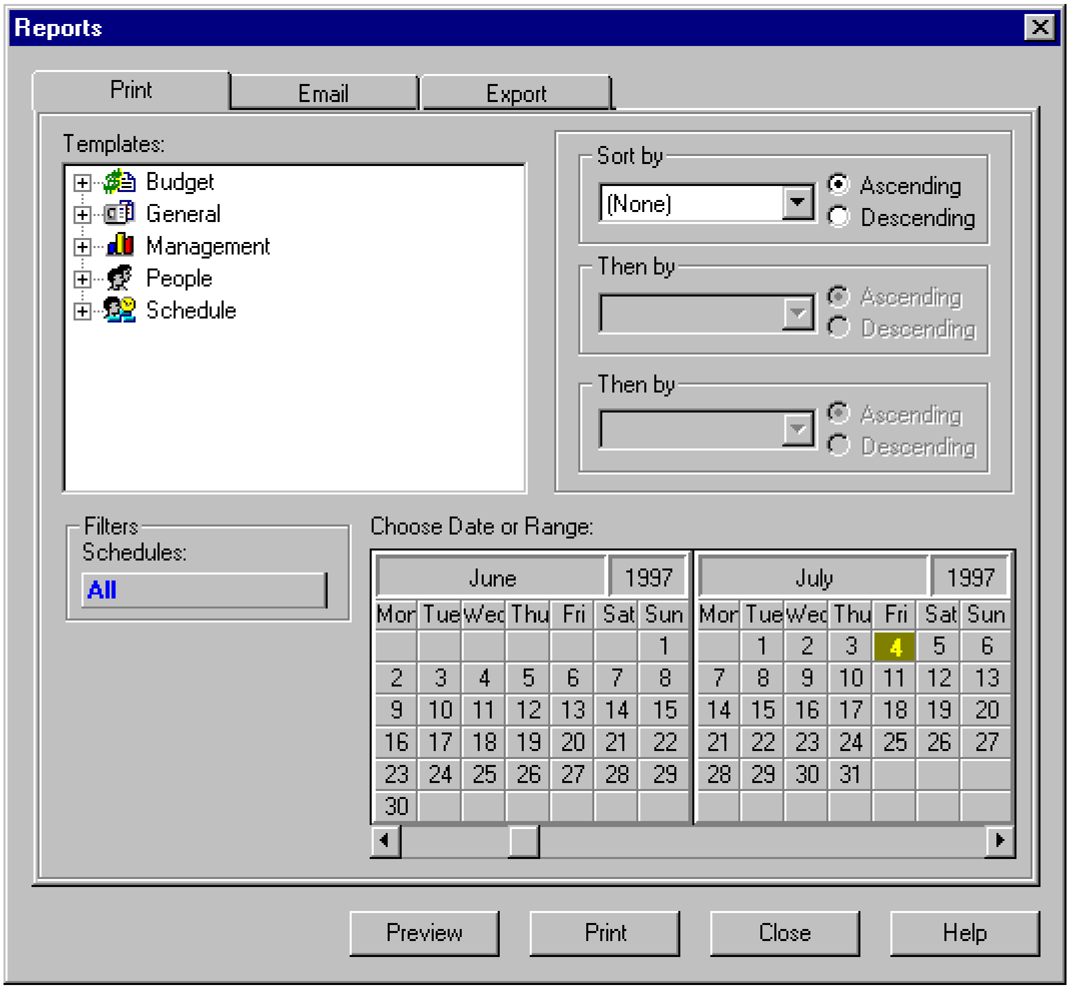
6120 CCS saves any changes you make instantly.

Reports window

You can select a report and print, e-mail, or export it with the Reports window. Reports access is assigned with the Administrator.

When you click File=>Print Figure 21 appears.

Figure 21 Reports window



Print tab

On the print tab, you can print report information.

Printing reports

- Click **Print**.

E-mail tab

On the Email tab, you can e-mail report information.

E-mailing reports

To e-mail a report:

1. Click **File**=>**Print**.
2. Click the **Email** tab.
3. Under **Templates**, expand the tree and select the report template to be e-mailed.

NOTE: Only scheduled reports and budget reports have a date range option.

4. In the calendar, click a date to select it, or click a date and drag the cursor across the calendar to select a range of dates, or press **Ctrl** to select dates that are not contiguous.
5. Under **Filters Schedules**, click **All** and select one or more display filters.
6. Under **Sort By**, select an option in the list and click **Ascending** or **Descending**.
7. Repeat step 3 to specify additional sort orders.
8. Click **Email** to e-mail the report, or click **Preview** to view the report on your monitor.

Export tab

On the Export tab, you can export report information.

Exporting reports

To export a report:

1. Click **File**=>**Print**.
2. Click the **Export** tab.
3. Under **Templates**, expand the tree and select the report template to be exported.

NOTE: Only scheduled reports and budget reports have a date range option.

4. In the calendar, click a date to select it, or click a date and drag the cursor across the calendar to select a range of dates, or press **Ctrl** to select dates that are not contiguous.
5. Under **Filters Schedules**, click **All** and select one or more display filters.
6. Under **Sort By**, select an option in the list and click **Ascending** or **Descending**.
7. Repeat step 6 to specify additional sort orders.
8. Click **Export** to export the report.

Backing up, restoring, and compacting the database

To back up the database:

1. Click **File**=>**Backup Database**.
2. Browse to the destination drive for the backup.
3. Click **Save** to create the backup file.

We recommend you back up 6120 CCS whenever you make major changes.

To restore the database:

1. Click **File**=>**Restore Database**.
2. Type the administrator's password.
3. Browse to the destination drive for the backup.
4. Select the backup file and click **Open**.

The 6120 CCS Restore screen appears.

5. Click **OK**.

The Confirm Restore screen appears.

NOTE: The restoration procedure overwrites all existing information in 6120 CCS.

6. Click **OK**.

To compact the database:

1. Click **File**=>**Compact Database**.
2. Type the administrator's password.

The Compact Database screen appears.

3. Click **OK**.

6120 CCS Tutorial

To create a schedule, you must follow these steps:

1. Set schedule names and times with the Option Window.
2. Add your employees to the schedules with the People Window.
3. Preview the proposed schedule with the Forecast Window.
4. Create the schedule with the Scheduler Window.
5. Create a schedule report with the Reports Window.

The following exercise will familiarize you with 6120 CCS.

To create an automatic schedule, you must follow these steps:

- Name a schedule.
- Create the work week.
- Create a shift.
- Describe the organization of your company.
- Add job skills.
- Add general employee information.
- Assign an employee a department, workgroup, and title.
- Add employee skills.
- Create an automatic schedule.

Scenario

In this scenario, you will create a schedule for the first shift of the day, and add one person to that schedule.

You run a travel agency. Your office is open from 7:00 A.M. until 7:00 P.M. Monday is the first day of the week, and your office is open five days a week. The first shift occurs daily from 7:00 A.M. until 3:00 P.M. The employees get a 15-minute break in the morning and again in the afternoon. These breaks are paid. Their lunch is 30 minutes, and is not paid.

You will add John Smith to the Early Shift. He is a domestic bilingual travel agent. He speaks English and Spanish. He works full time.

Options window: General tab

When you click Tools=>Options Window, the General tab appears. (See Figure 29.)

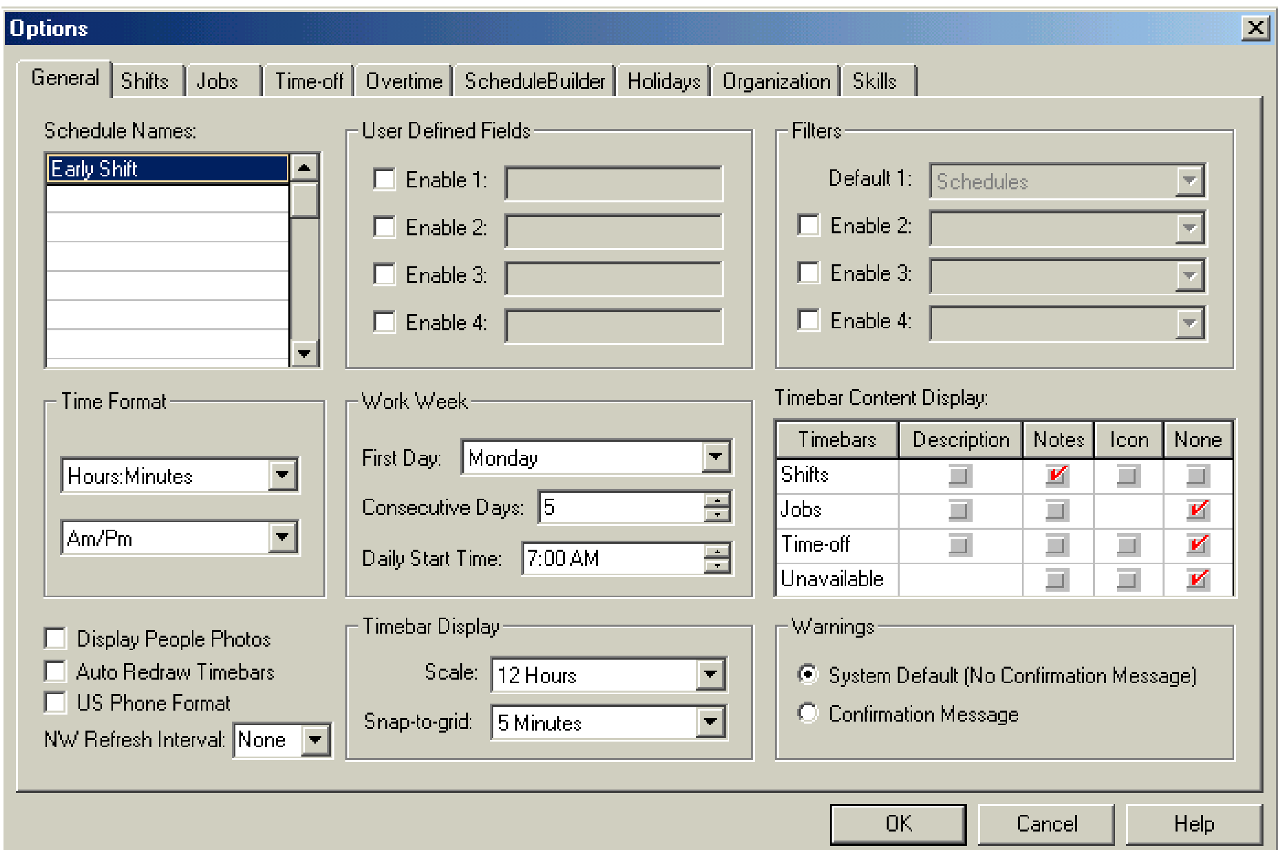
Naming a schedule

1. On the Scheduler window, click **Tools**=>**Options**.
2. Under **Schedule Names**, type **Early Shift**.

Creating the work week

1. Under **Work Week**, in the **First Day** list, select **Monday**.
2. Under **Work Week**, in the **Consecutive Days** list, select **5**.
3. Under **Work Week**, in the **Daily Start** list, select **7:00 A.M.**
4. Under **Timebar Content Display**, select the **Description** check box for **Shifts**.
5. Under **Timebar Display**, in the **Scale** list, select **12 hours**.
6. Click **OK**.

Options window: General



Options window: Shift tab

Creating a shift

1. On the Scheduler window, click **Tools**=>**Options**.
2. Click the **Shift** tab.

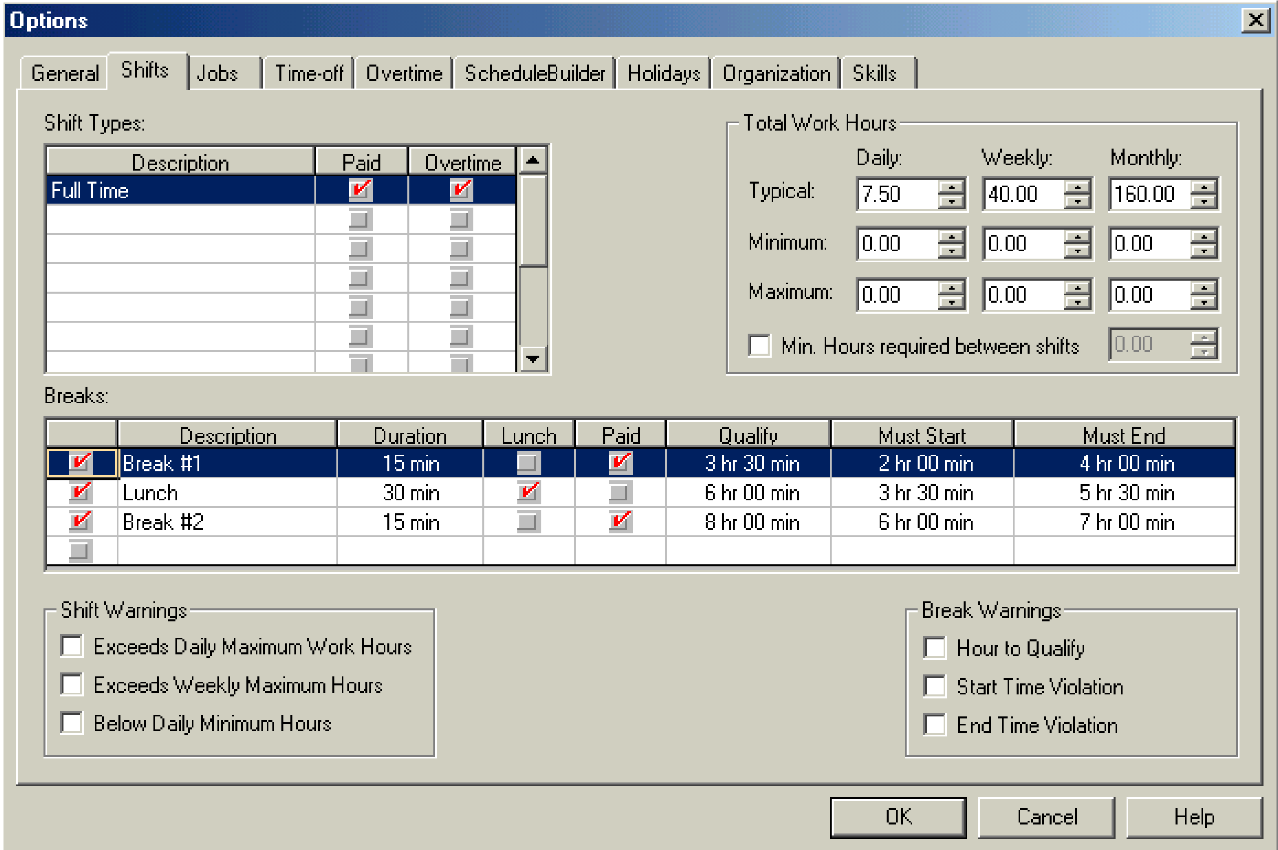
The Options window, Shifts tab appears. (See Figure 30.)

3. Under **Shift Types**, in the **Description** box, type **Full-time**.
4. Under **Shift Types**, select the **Paid** check box.

Note: The Total Work Hours are the number of hours for which the employee is paid. When John Smith works from 7:00 A.M. until 3:00 P.M., and has a half-hour lunch, he is paid for only 7.5 hours.

5. Under **Total Work Hours**, in the **Typical Daily** list, select **7.5**.
6. Under **Total Work Hours**, in the **Typical Weekly** list, select **37.5**.
7. Under **Total Work Hours**, in the **Typical Monthly** list, select **150**.
8. Under **Breaks**, in the **Description** box, type **Break 1**.
9. Under **Breaks**, in the **Duration** list, type **15 minutes**.
10. Under **Breaks**, select the **Paid** check box.
11. Create two more breaks: a lunch break of 30 minutes and an afternoon break of 15 minutes. For the lunch break, select the Lunch check box, not the Paid check box.
12. Click **OK**.

Options window: Shifts



Options window: Organization tab

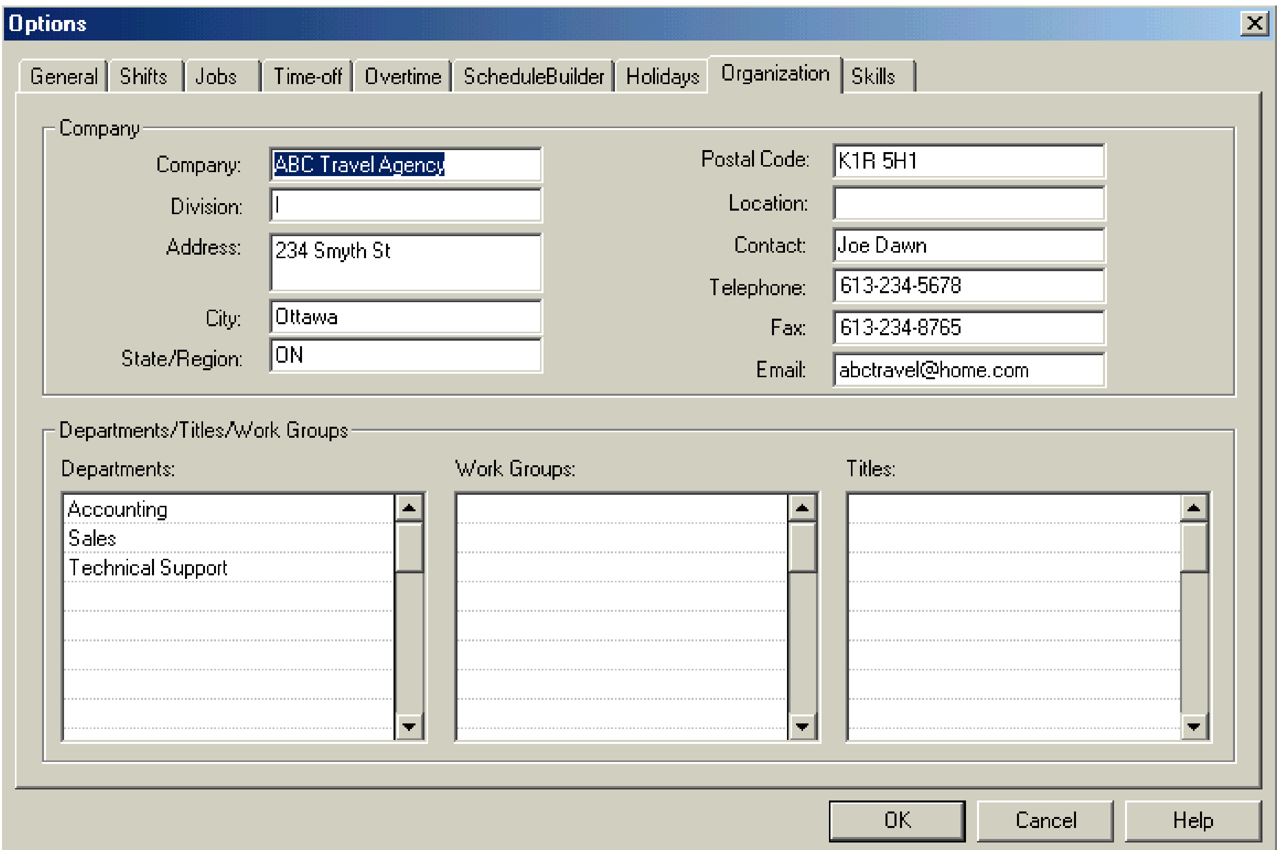
Describing the organization of your company

1. On the Scheduler window, click **Tools**=>**Options**.
2. Click the **Organization** tab.

The Options window, Organization tab appears. (See Figure 31.)

3. Under **Company**, type the company name and address.
4. Under **Departments**, type **Sales, Accounting,** and **Technical Support**.

Options window: Organization



Department 1: Sales

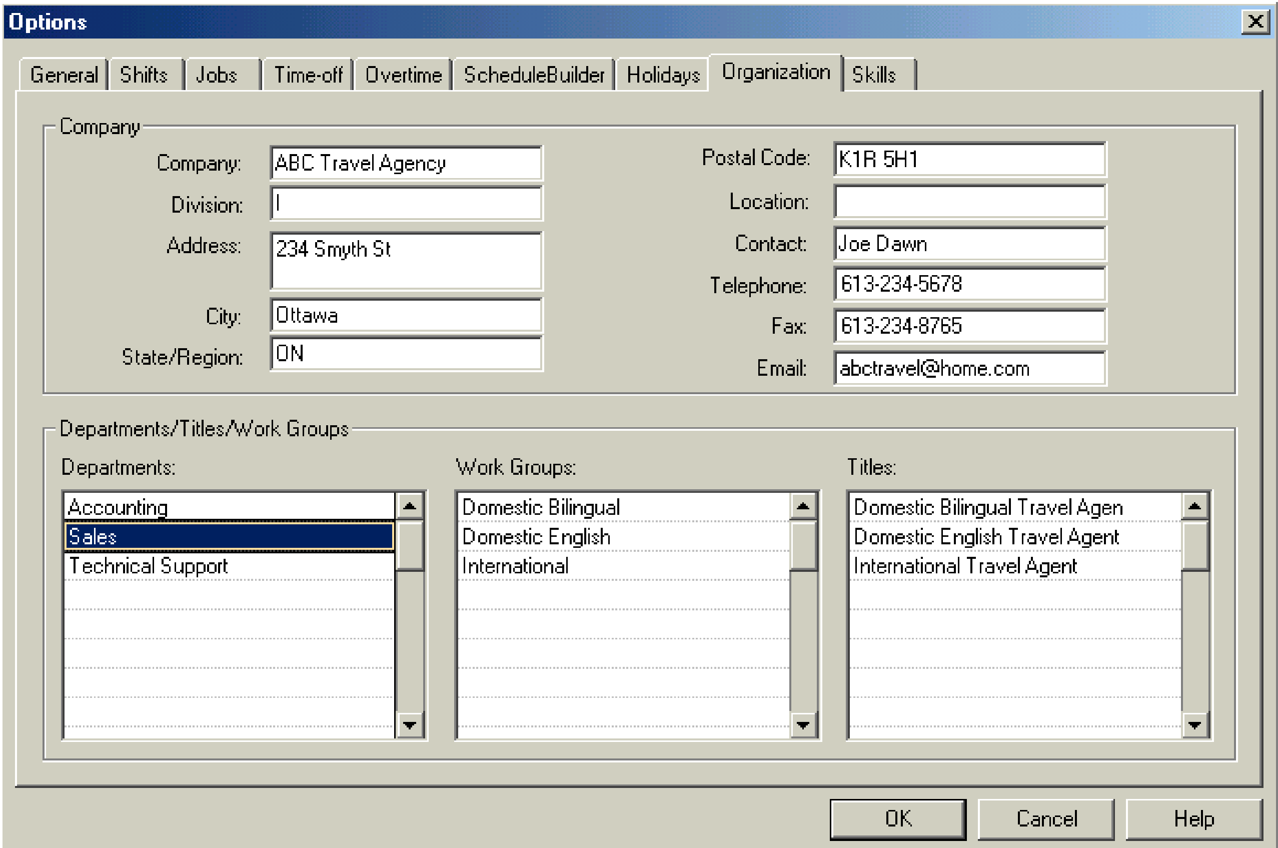
1. Under **Departments**, select **Sales**.

The Options window, Organization tab appears for Sales. (See Figure 32.)

2. Under **Workgroups**, type **Domestic English Sales**, **Domestic Bilingual Sales**, and **International Sales**.

3. Under **Titles**, type **Domestic English Travel Agent**, **Domestic Bilingual Travel Agent**, and **International Travel Agent**.
4. Click **OK**.

Options window: Sales Organization



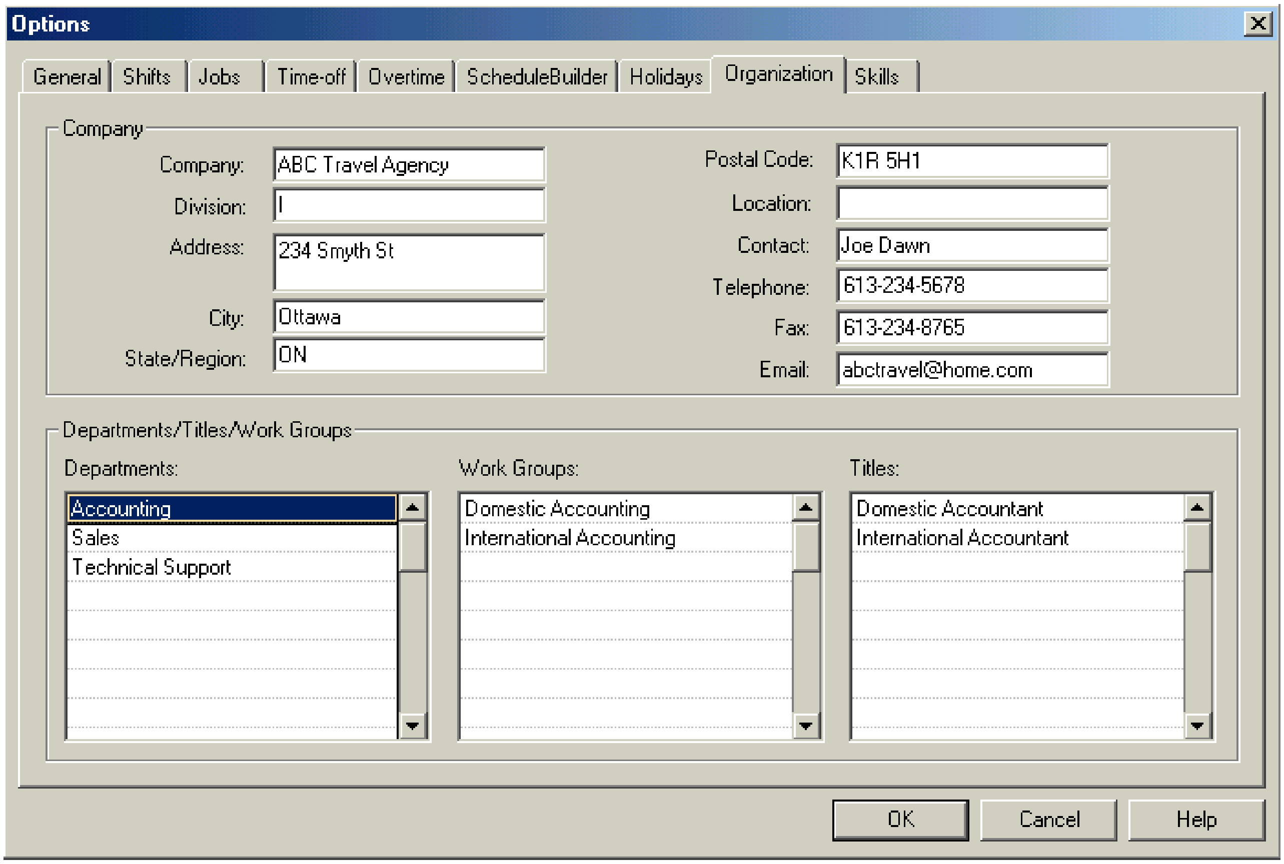
Department 2: Accounting

1. On the Scheduler window, click **Tools**=>**Options**.

The Options window, Organization tab appears for Accounting. (See Figure 33.)

2. Click the **Organization** tab.
3. Under **Departments**, select **Accounting**.
4. Under **Workgroups**, type **Domestic Accounting** and **International Accounting**.
5. Under **Titles**, type **Domestic Accountant** and **International Accountant**.

Options window: Accounting Organization



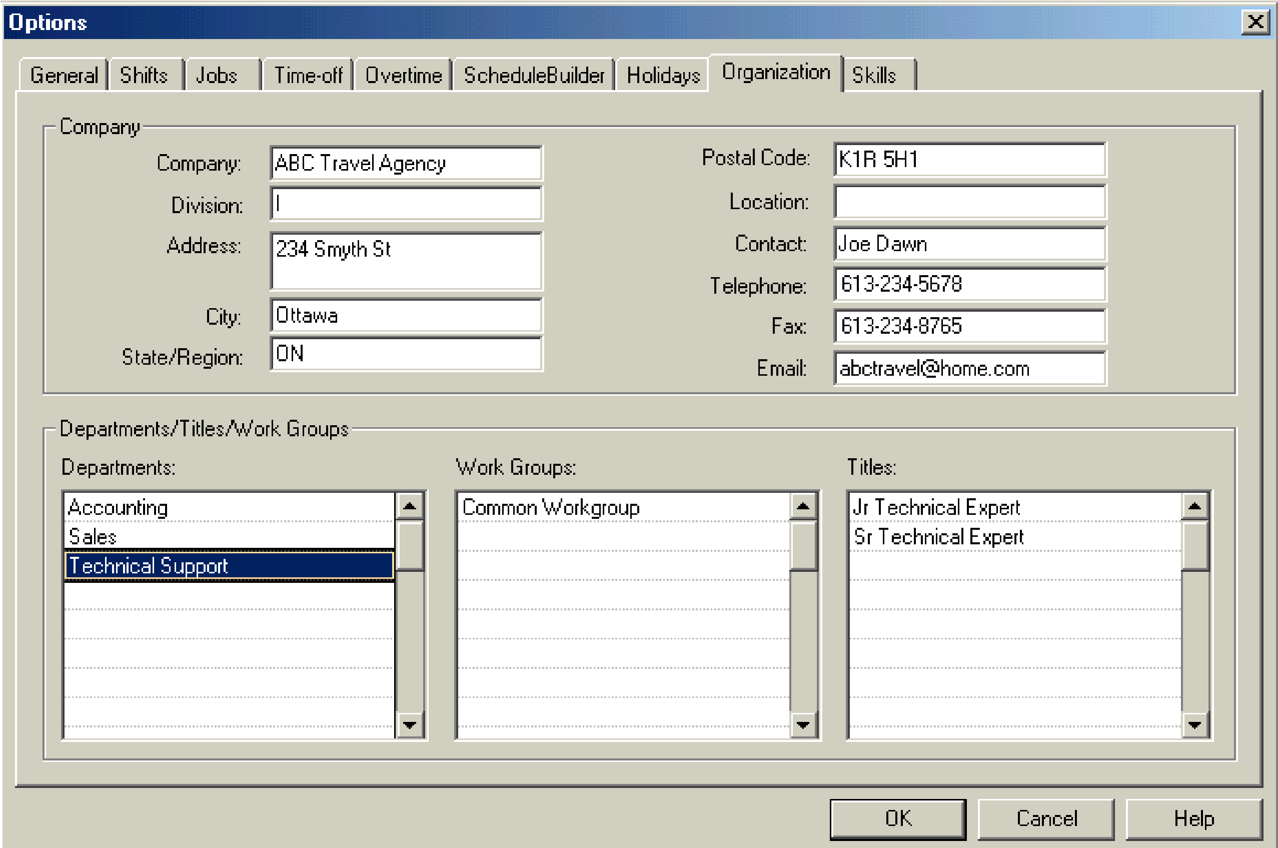
Department 3: Technical Support

1. On the Scheduler window, click **Tools**=>**Options**.

The Options window, Organization tab appears for Technical Support. (See Figure 34.)

2. Click the **Organization** tab.
3. Under **Departments**, select **Technical Support**.
4. Under **Workgroups**, type **Common Workgroup**.
5. Under **Titles**, type **Sr. Technician** and **Jr. Technician**.
6. Click **OK**.

Options window: Technical Support Organization



Options window: Skills tab

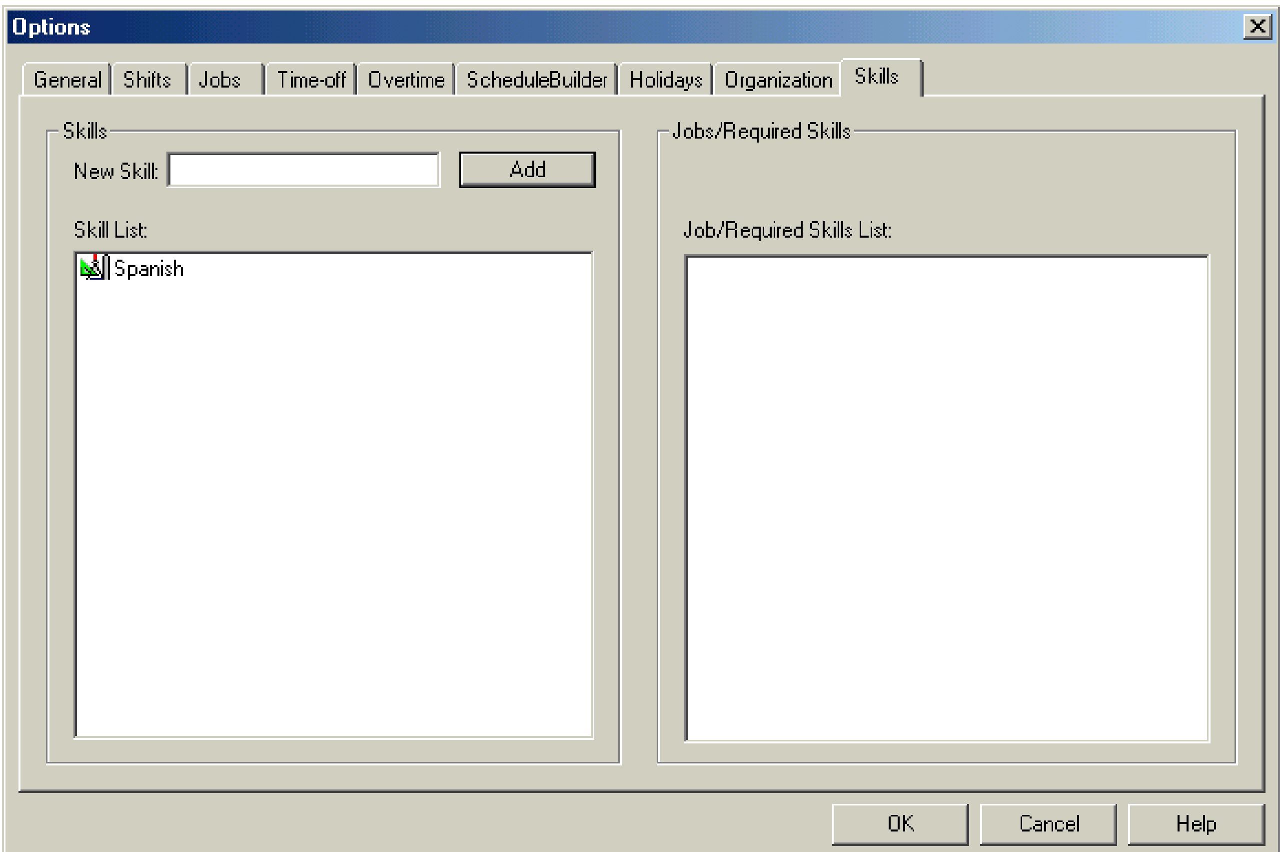
Adding job skills

1. On the Scheduler window, click **Tools**=>**Options**.

The Options window, Skills tab appears. (See Figure 35.)

2. Click the **Shift** tab.
3. Under **Skills**, in the **New Skill** box, type **Spanish**.

Options window: Skills



These are employee skills necessary to get the job done. For example, you may need some employees to serve customers in Spanish.

4. Click **Add**.

The skill *Spanish* appears in the Skill List.

5. Click **OK**.

People window

Adding general employee information

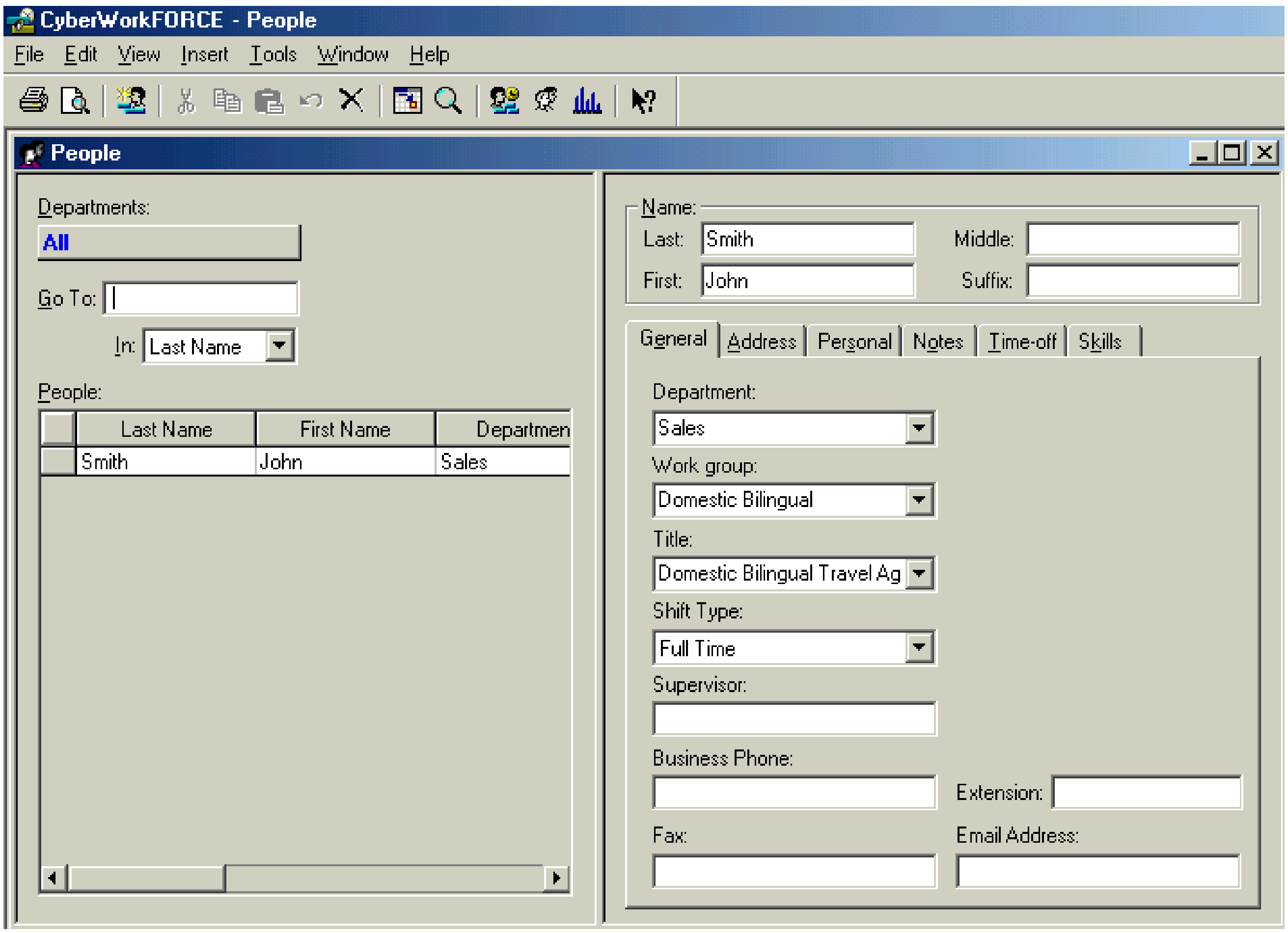
John Smith is a domestic bilingual travel agent. He speaks English and Spanish. He works full time.

1. On the Scheduler window, click **Window**=>**People Window**.

The People window, General tab appears. (See Figure 36.)

2. Click **Insert**=>**Person**.
3. Under **Name**=>**Last**, type **Smith**.
4. Under **Name**=>**First**, type **John**.

People window



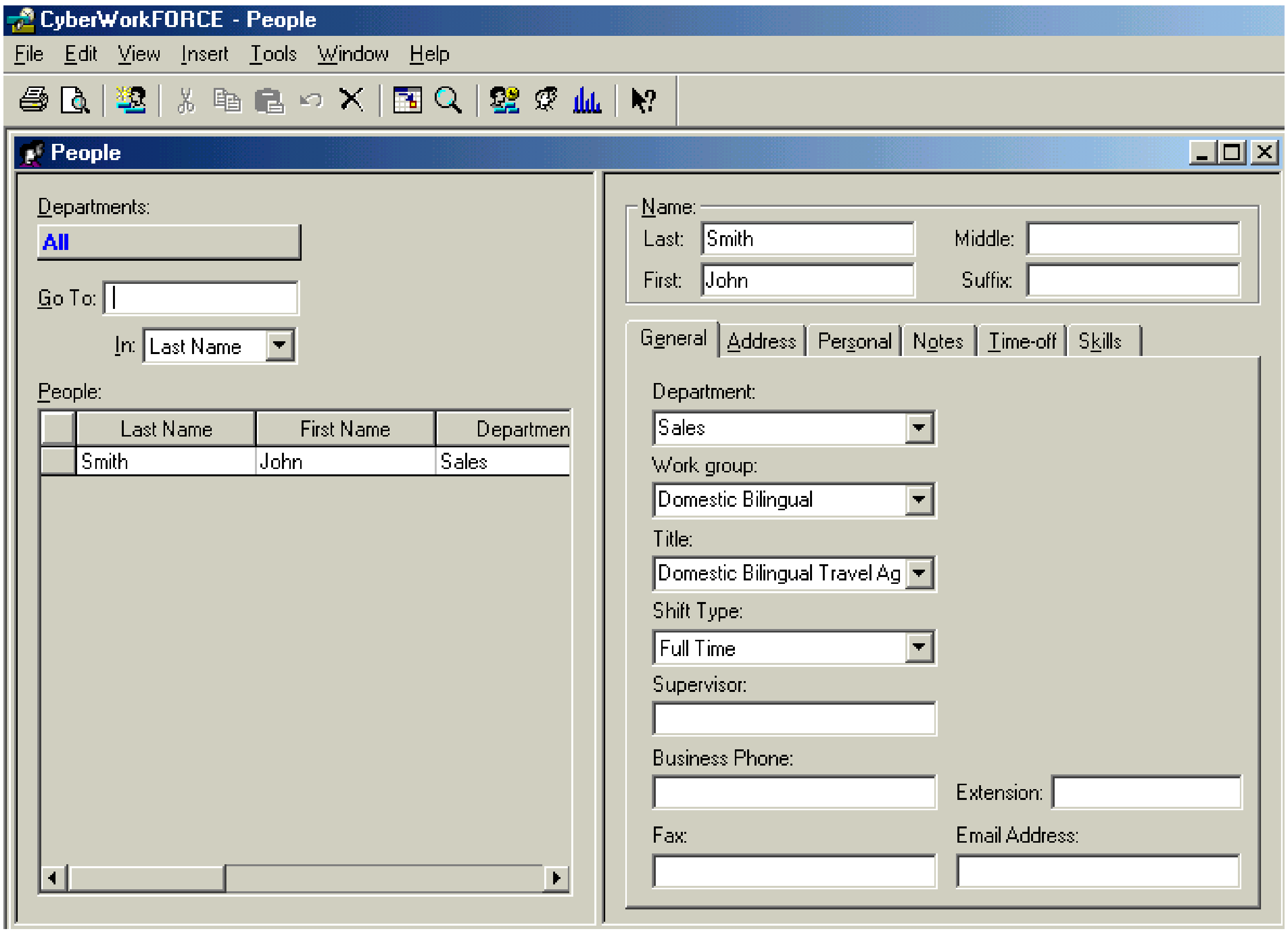
People window: General tab

Assigning an employee a department, workgroup, and title

Figure 37 shows the People window, General tab.

1. Under **Department**, select **Sales**.
2. Under **Workgroup**, select **Domestic Bilingual Sales**.
3. Under **Title**, select **Domestic Bilingual Travel Agent**.
4. Under **Shift Type**, select **Full-Time.**

People window: General



People window: Skills tab

Adding employee skills

The skills that you entered in the Option window, on the Skills tab, are displayed in the Available Skills list. You entered Spanish as a skill. John Smith is a bilingual travel agent, so his skill is Spanish.

1. Click the **Skills** tab.

The People window, **Skills** tab appears. (See Figure 38.)

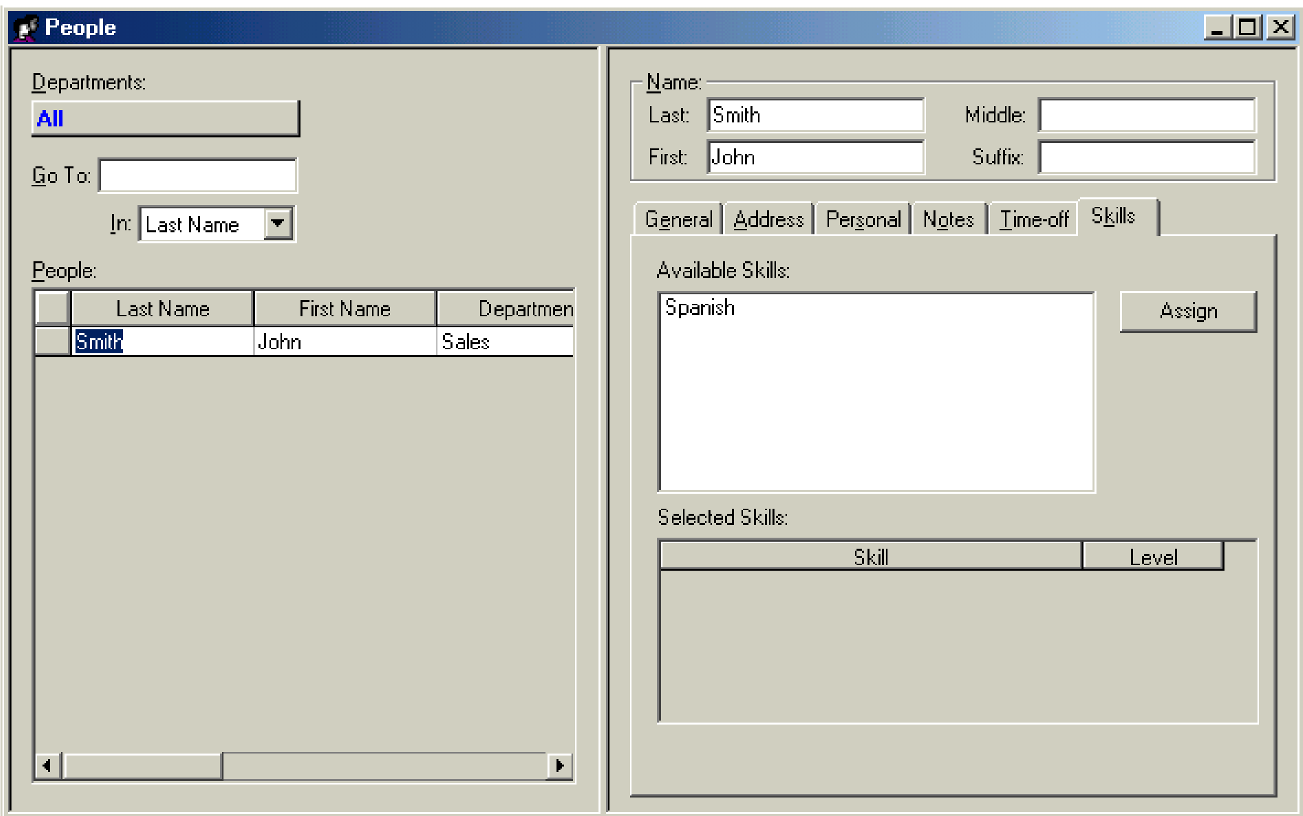
1. Under the **Available Skills** list, select **Spanish.**
2. Click **Assign**.

The skill appears in the Selected Skills list.

3. Click the x in the upper-right corner of the window.

The window closes.

People window: Skills



ScheduleBuilder window

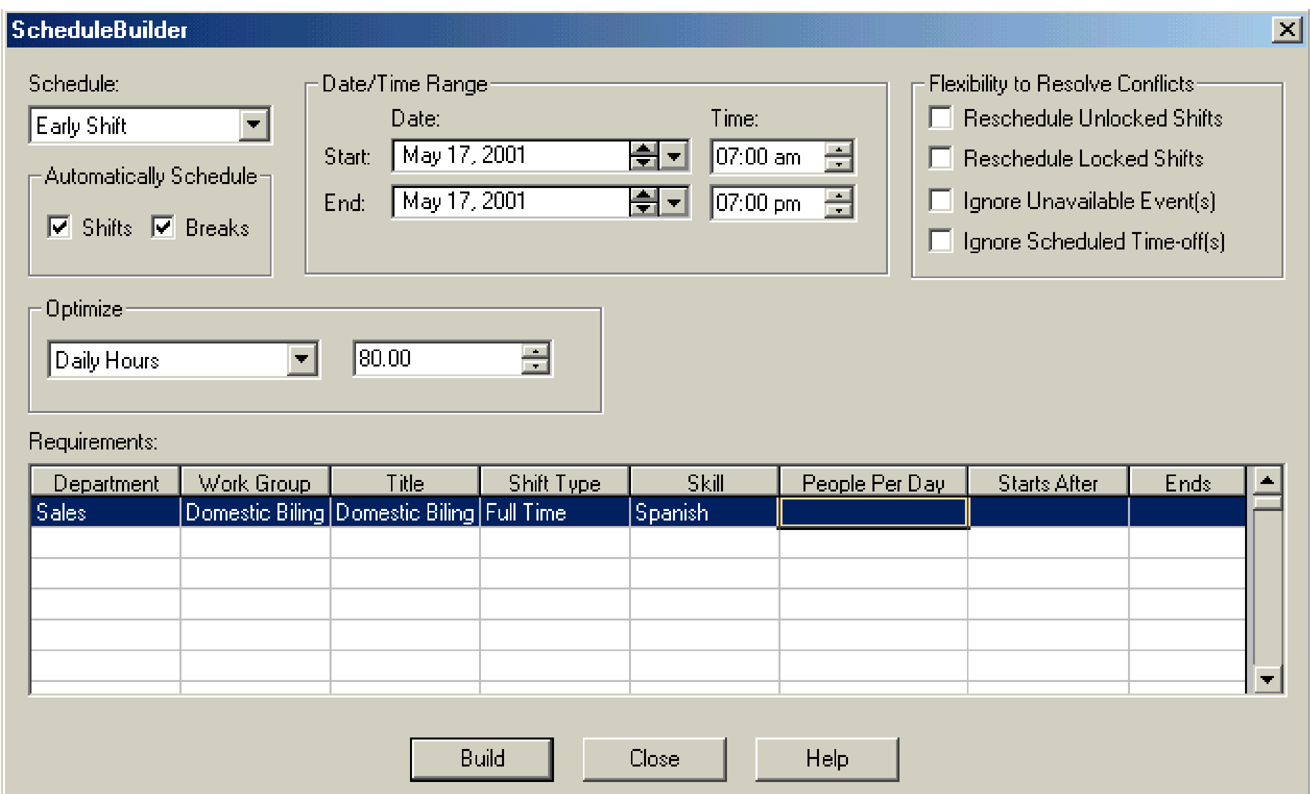
Creating an automatic schedule

1. On the **Scheduler** window, click **Tools**=>**ScheduleBuilder**.

The ScheduleBuilder window appears. (See Figure 39.)

2. Under **Schedule**, select **Early Shift**.
3. Under **Automatically Schedule**, select the **Shifts** check box.
4. Under **Automatically Schedule**, select the **Breaks** check box.
5. Under **Requirements**, in the **Department** list, select **Sales**.
6. Under **Requirements**, in the **Workgroup** list, select **Domestic Bilingual Sales**.
7. Under **Requirements**, in the **Title** list, select **Domestic Bilingual Travel Agent**.
8. Under **Requirements**, in the **Shift Type** list, select **Full-Time**.
9. Under **Requirements**, in the **Skill** list, select **Spanish**.
10. Under **Requirements**, in the **People Per Day** list, select **1**.
11. Under **Requirements**, in the **Starts After** list, select **7:00 A.M.**
12. Under **Requirements**, in the **Ends** list, select **3:00 P.M.**
13. Click **Build**.

ScheduleBuilder window

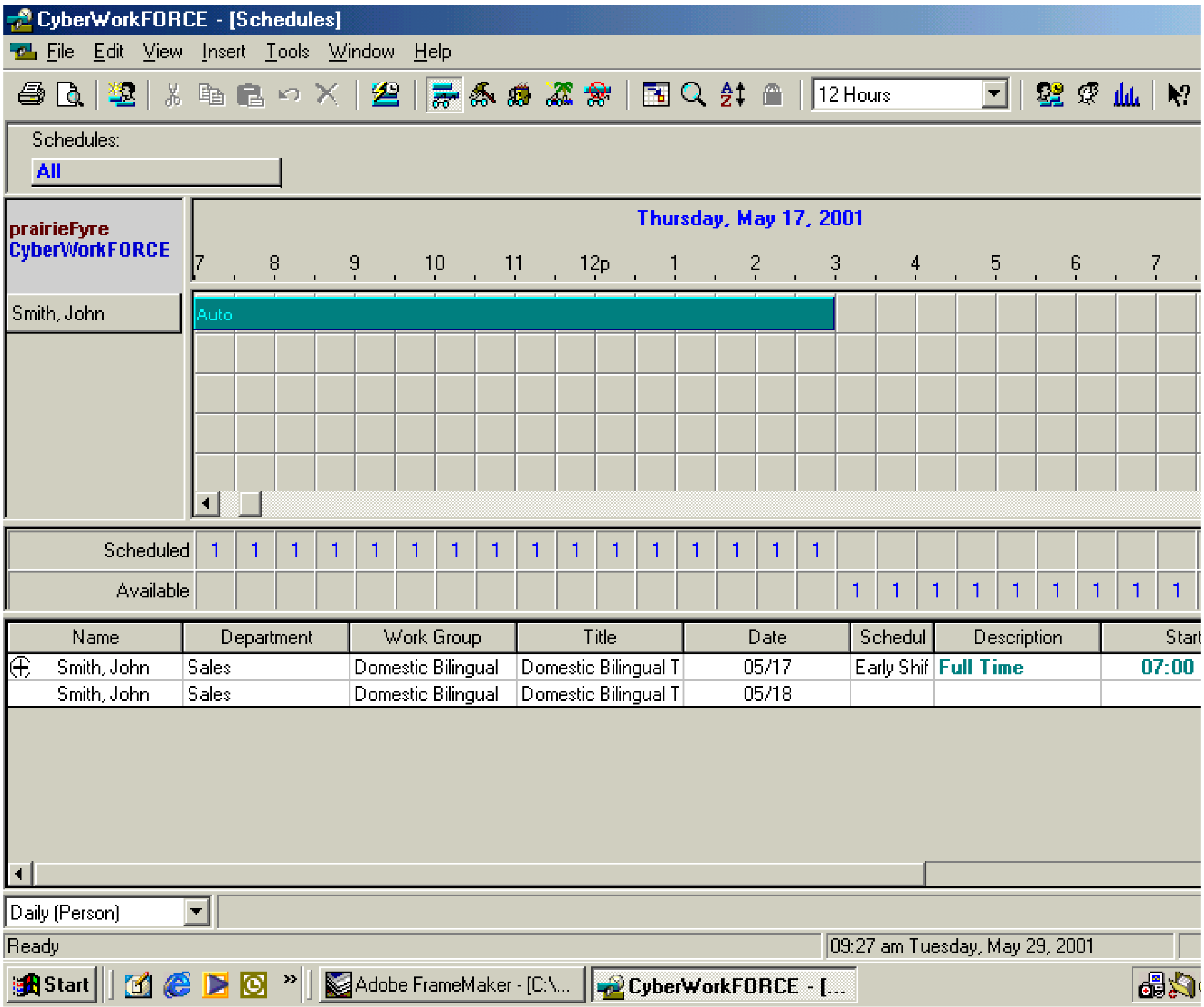


A Schedule Builder Session Summary appears. When the rate per hour has been input in the Jobs box of the Options window, the summary indicates the budget spent on staff.

14. Click **Close**.
15. Click **View=>Timebars=>Shifts**.

A green time bar spanning the shift hours appears next to an employee's name. (See Figure 40.)

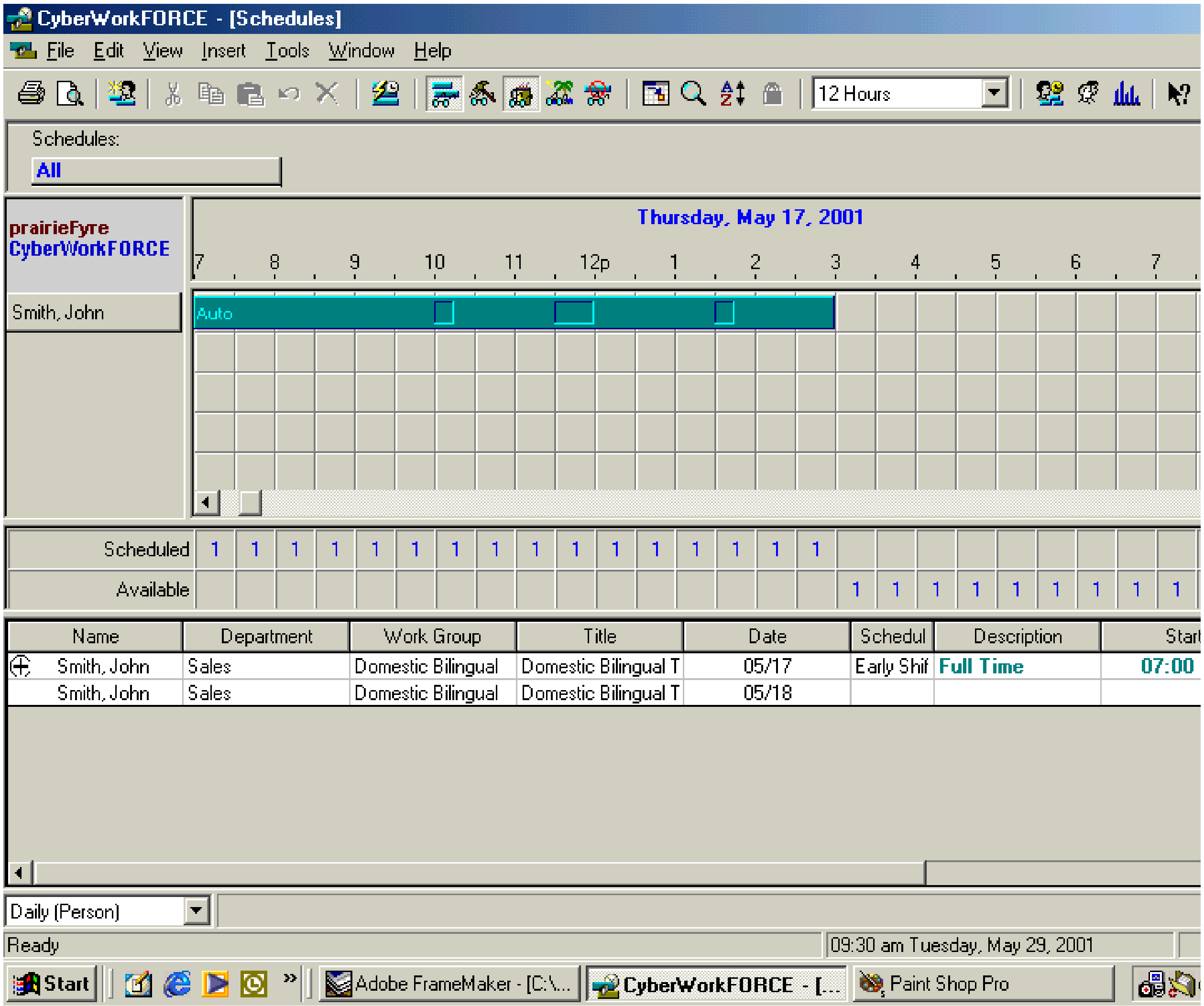
Scheduler window: Shift timebar



16. Click **View=>Timebars=>Breaks**.

The breaks appear on the green time bar. (See Figure 41.)

Scheduler window: Breaks timebar



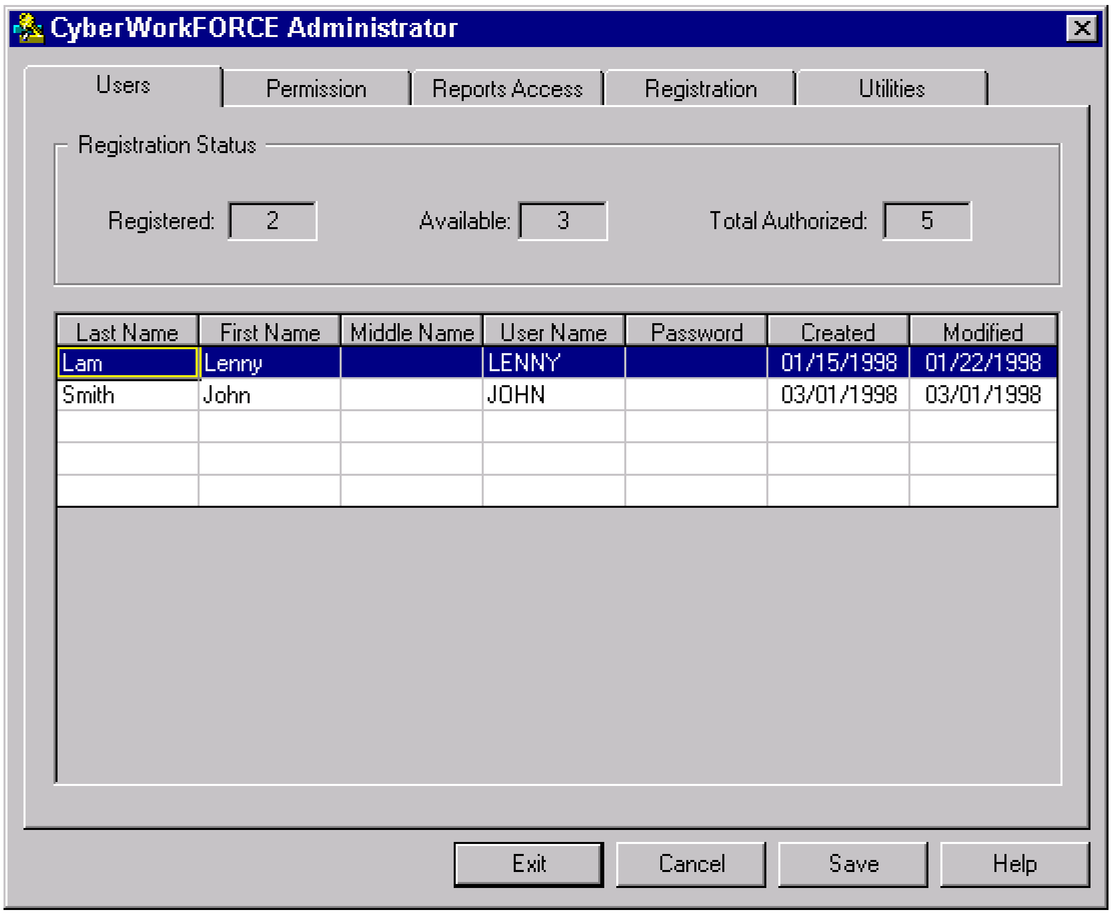
6110 CCS Administrator

You can change users permissions even after 6120 CCS has been setup and is running. Administrator controls which information particular users can use over the network.

Administrator consists of five tabs: Users, Permission, Reports Access, Registration, and Utilities.

When you start Administrator, Figure 22 appears.

Figure 22 Administrator window: Users tab



Users tab

On the Users tab, you specify which users can gain access to 6120 CCS. The number of licenses you purchase dictates the number of users who can use 6120 CCS over the network. You are permitted a maximum of five users for each license. You must purchase additional licenses if you need to add more than five users.

Adding users

NOTE: You must enter a last name, first name, and user name for each user. Typing information in the other fields is optional.

To add a user:

1. Click the **Users** tab.
2. Type a last name, first name, middle name, user name, and password for the user.
3. Click **Save** to save your changes or **Exit** to quit Administrator without saving your changes.

Editing user names

To edit a user name:

1. Click the **Users** tab.
2. Click a field and type the change.
3. Click **Save** to save your changes or **Exit** to quit Administrator without saving your changes.

Deleting users

To delete a user:

1. Click the **Users** tab.
2. Click the user to be deleted.
3. Press **Delete**.
4. Click **Save** to save your changes or **Exit** to quit Administrator without saving your changes.

The user is no longer registered in Administrator and can no longer gain access to 6120 CCS.

Permission tab

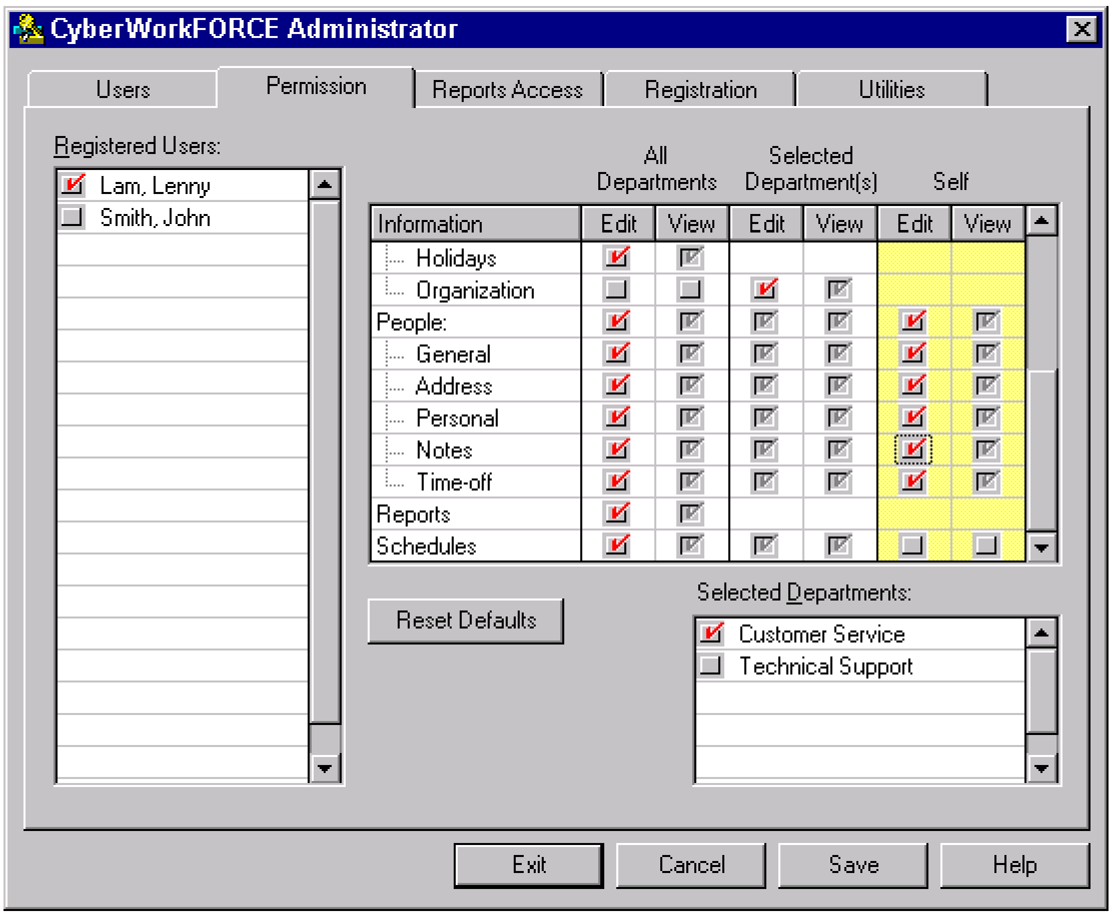
When you start Administrator and click the Permission tab, Figure 23 appears.

On the Permission tab, you specify the viewing and editing permissions of registered 6120 CCS users.

The headings above the Edit and View check boxes vary depending on which entry is selected in the Information column. When you select Edit, View is automatically enabled.

In Figure 23 Lenn Lam has been granted permission to view and edit holiday, people, report, and schedule information for all departments in 6120 CCS. Lenny can view and edit organization information on the Customer Service department only, and can view and edit personal information on himself.

Figure 23 Administrator window: Permission tab



Changing permissions

When you specify the viewing and editing permissions of registered 6120 CCS users, you can grant users permission to view and edit particular categories of information across all departments, or selected departments, or grant users permission to view particular categories of information on themselves. In addition, you can specify which report types a user can view when running reports.
To change a user's permission attributes for all departments:

1. Click the **Permission** tab.
2. Under **Registered Users**, select a user.
3. Under **Information**, select a category, such as **People**.
4. Under **All Departments**, click the **Edit** or **View** check box to enable the user to edit and/or view the category across all departments.
5. Repeat steps 3 and 4 to enable the user to edit and/or view other categories across all departments.
6. Click **Save** to save your changes or **Exit** to quit Administrator without saving your changes.

To change a user's permission attributes for a particular department:

1. Click the **Permission** tab.
2. Under **Registered Users**, select a user.
3. Under **Information**, select a category, such as Forecast.
4. Under **Selected Departments** (bottom right grid) select a department.
5. Under **All Departments**, clear the **Edit** or **View** check box for the category if it is enabled.
6. Under **Selected Departments**, click the **Edit** or **View** check box to enable the user to edit and/or view the category for the department.
7. Repeat steps 3 to 6 to enable the user to edit and/or view other categories for the department.
8. Click **Save** to save your changes or **Exit** to quit Administrator without saving your changes.

To change a user's permission attributes for editing and/or viewing personal information or reports:

1. Click the **Permission** tab.
2. Under **Registered Users**, select a user.
3. Under **Information**, select a category, such as Schedules.
4. Under **Self**, click the **Edit** or **View** check box to enable the user to edit and/or view the category.
5. Repeat steps 3 and 4 to enable the user to edit and/or view other categories of information.
6. Click **Save** to save your changes or **Exit** to quit Administrator without saving your changes.

To specify which report types a user can view when running reports:

1. Click the **Reports Access** tab.
2. Under **Registered Users**, select a user.
3. Under **Reports**, click the check boxes of report types the user can view when running reports.
4. Click **Save** to save your changes or **Exit** to quit Administrator without saving your changes.

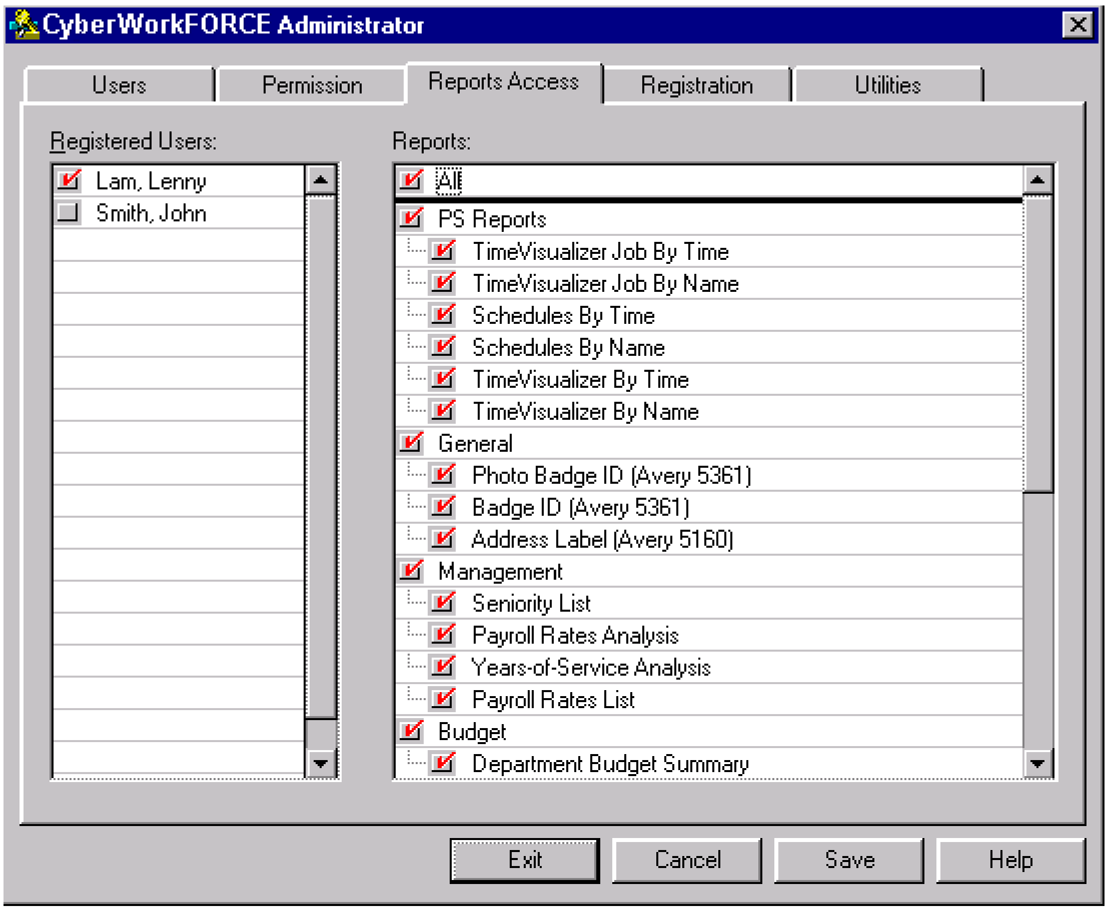
Reports Access tab

When you start Administrator and click the Reports Access tab, Figure 24 appears.

You can specify which reports or report categories registered users can view when running reports in 6120 CCS. You can grant a user access to all reports, to particular categories of reports, or to specific reports.

There are six categories of reports: PS Reports, General Reports, Management Reports, Budget Reports, Schedule Reports, and People Reports. Each category has several types of reports.

Figure 24 Administrator window: Reports Access tab



Changing report access

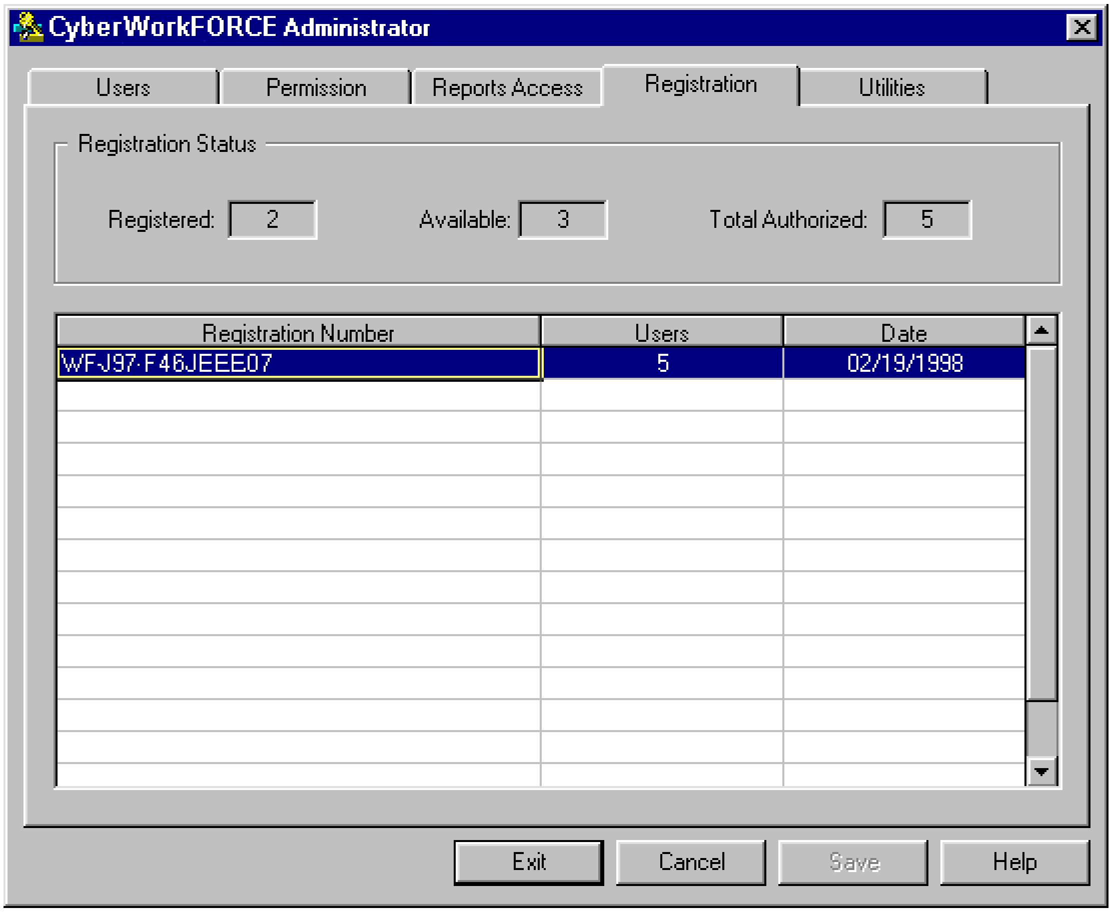
1. In the **Registered Users** list, select the user whose access you want to change.
2. In the **Reports** list, select the report or report category you want to change.
3. Click **Save**.

Registration tab

When you start Administrator and click the Registration tab, Figure 25 appears.

On the Registration tab, you can add registration numbers for any additional licenses you purchase.

Figure 25 Administrator window: Registration tab



Adding and deleting registration numbers

To add a registration number:

1. Click the **Registration** tab.
2. Under **Registration Number**, type a registration number.
3. Under **Reports**, click the check boxes of report types the user can view when running reports.
4. Click **Exit** to save your changes or Cancel to quit Administrator without saving your changes.

Before you delete a registration number, you must delete the corresponding registered users from the Users tab.
To delete a registration number:

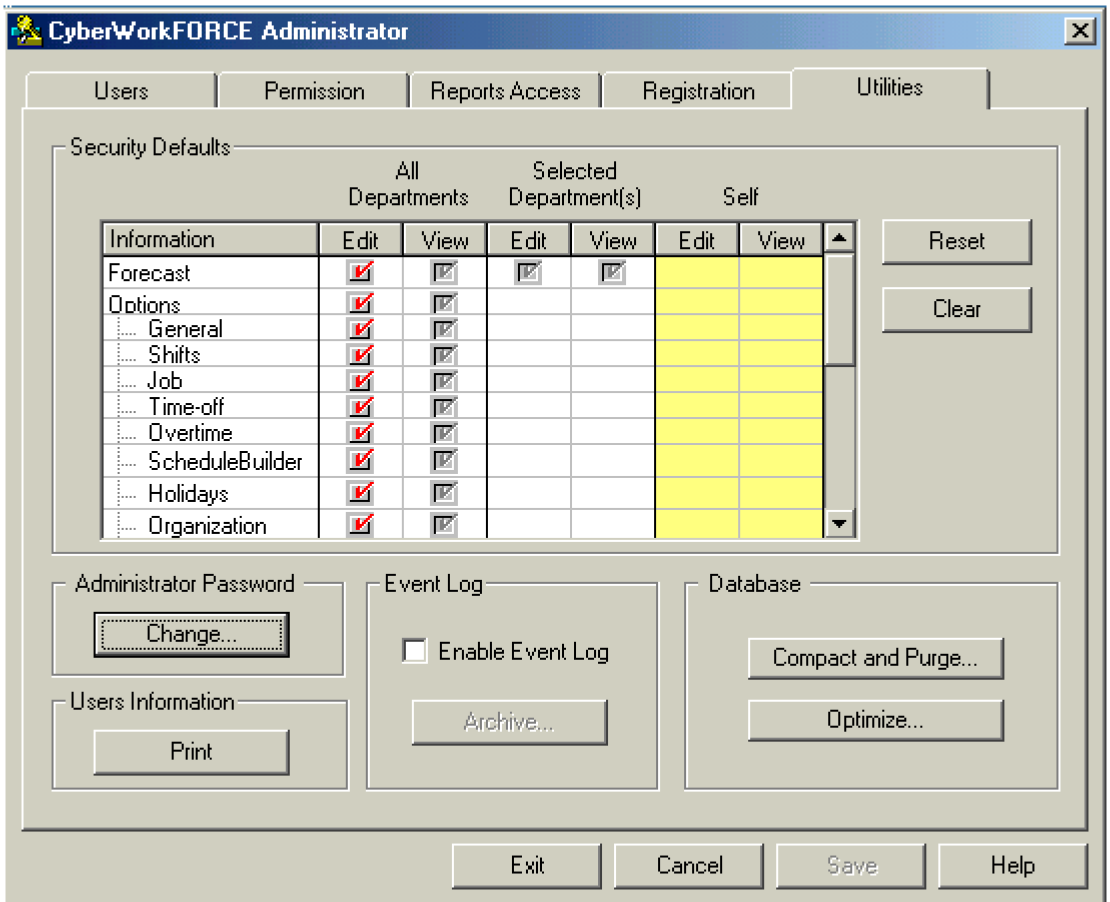
1. Click the **Registration** tab.
2. Under **Registration Number**, select a registration number to delete.
3. Press **Delete**.
4. Click **OK**.
5. Click **Exit** to save your changes or **Cancel** to quit Administrator without saving your changes.

Utilities tab

When you start Administrator and click the Utilities tab Figure 26 appears.

On the Utilities tab, you can print user information, change the Administrator password, and compact, purge, and optimize the database.

Figure 26 Administrator window: Utilities tab



Changing the administrator password

To change the administrator password:

1. Click the **Utilities** tab.
2. Click **Change**.
3. Type your old password, type a new password, confirm your new password, and click **OK**.
4. Click **Save** to save your changes or **Cancel** to quit Administrator without saving your changes.

Optimizing the database

To optimize the database:

1. Click the **Utilities** tab.
2. Click **Optimize**.
3. Click **Yes** to proceed.

Printing a list of registered 6120 CCS users

To print a list of registered 6120 CCS users:

1. Click the **Utilities** tab.
2. Click **Print**.
3. Select print properties and click **OK**.