

HUMAN RESOURCES

AVAILABILITY CODES

You must set up availability codes, e.g. **Unavailable**, **Available** in order to set up a **Technician List**.

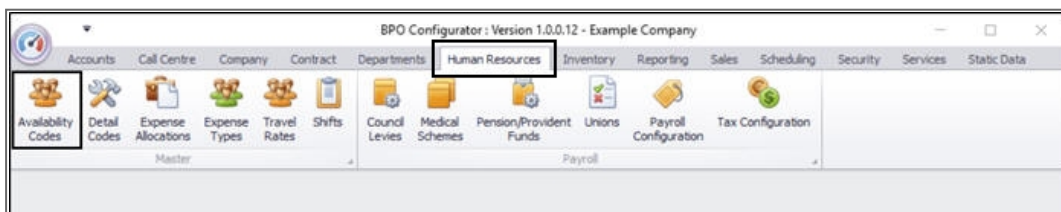
You can schedule call workload, by assigning a technician and then using the **Start** and **End** work function on the call screen. This requires the technician to notify the call centre when work has **begun** and **ended**. Time taken to complete the work will be automatically calculated.

Alternatively, if you use **Tech Connect**, when the technician starts his day on his mobile device, his status will move from **Unavailable** to **Available**. The following default set up is a must (additional codes can be added to these if you wish to use this functionality manually)

- **AVA: Available** - Start Day
- **UNA: Unavailable** - Is Unavailable, Is Default or End Day

Using these function will give you the ability to pull the **Activity** report on the call screen, in order to see which technicians are available to assign to a new call; and to see who is currently working on assigned calls. Also, for clients who use **Tech Connect**, the technician's **GPS** location is stored. You can view their last known location from the **Activity** screen.

Ribbon Access: *Configurator > Human Resources > Availability Codes*



The **Availability Codes** listing screen will be displayed.

- Here you can view the availability codes currently on the system.

ADD AN AVAILABILITY CODE

- Click in the first **editable** field in the **final row** to **'activate'** it.

Availability Codes - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Delete Save Layout Workspaces Save Filter Refresh

| AvailabilityCode | Description | Default | IsUnavailable | StartDay | EndDay | Status |
|------------------|-------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------|
| | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| AV | Available | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | A |
| UN | Unavailable | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | A |
| | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |

Open Windows 08 May 2018

AVAILABILITY CODE DETAILS

- Now you can type in the details of the new availability code.
 - **Availability Code:** Type in the availability code.
 - **Description:** Type in the availability description.
 - **Default:** Click in this check box if you wish this to be the **default** code.
 - **Note:** Only one code should be set as default, and this is normally the ***Unavailable*** availability code.
 - **Is Unavailable:** Click in this check box if you wish this to be an ***Is Unavailable*** code.
 - **Start Day:** Click in this check box if you wish this to be a ***Start Day*** code.
 - **End Day:** Click in this check box if you wish this to be an ***End Day*** code.
 - **Status:** This will auto populate with **A** - Active.

Availability Codes - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Delete Save Layout Workspaces Save Filter Refresh

| AvailabilityCode | Description | Default | IsUnavailable | StartDay | EndDay | Status |
|------------------|-------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------|
| | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| AV | Available | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | A |
| UN | Unavailable | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | A |
| | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |

Open Windows 08 May 2018

- In this image, a new **Unavailability** code has been created:
 - **OL** - On Leave

SAVE AVAILABILITY CODE

- Press **Tab or Enter** on your keyboard.
- An **Update** message box will pop up asking;
 - **Are you sure you want to save changes to this Availability Code?**
- Click on **Yes**.

The screenshot shows the 'Availability Codes - BPO Configurator' application window. The title bar indicates 'Version 1.0.0.12 - Example Company'. The menu bar includes: Home, Accounts, Call Centre, Company, Contract, Departments, Human Resources, Inventory, Reporting, Sales, Scheduling, Security, Services, and Static Data. The ribbon contains: Delete, Save Layout, Workspaces, Save Filter, and Refresh. Below the ribbon is a table with the following data:

| AvailabilityCode | Description | Default | IsUnavailable | StartDay | EndDay | Status |
|------------------|-------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------|
| | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| AV | Available | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | A |
| UN | Unavailable | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | A |
| DI | Unavailable | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | A |

An 'Update' dialog box is displayed in the foreground, asking: 'Are you sure you want to save changes to this Availability Code?'. The dialog has three buttons: 'Yes', 'No', and 'Cancel'. The 'Yes' button is highlighted with a black border.

At the bottom of the application window, there is a status bar with 'Open Windows' on the left and '08 May 2018' on the right.

- The new availability code will be **saved** and a **new row** will be created in the **Availability Codes** data grid.

The screenshot shows a software window titled "Availability Codes - BPO Configurator : Version 1.0.0.12 - Example Company". The interface includes a menu bar with options like Home, Accounts, Call Centre, Company, Contract, Departments, Human Resources, Inventory, Reporting, Sales, Scheduling, Security, Services, and Static Data. Below the menu is a toolbar with icons for Delete, Save Layout, Workspaces, Save Filter, and Refresh. The main area contains a table with the following data:

| AvailabilityCode | Description | Default | IsUnavailable | StartDay | EndDay | Status |
|------------------|-------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------|
| | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| AV | Available | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | A |
| UN | Unavailable | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | A |
| OL | Unavailable | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | A |
| | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

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