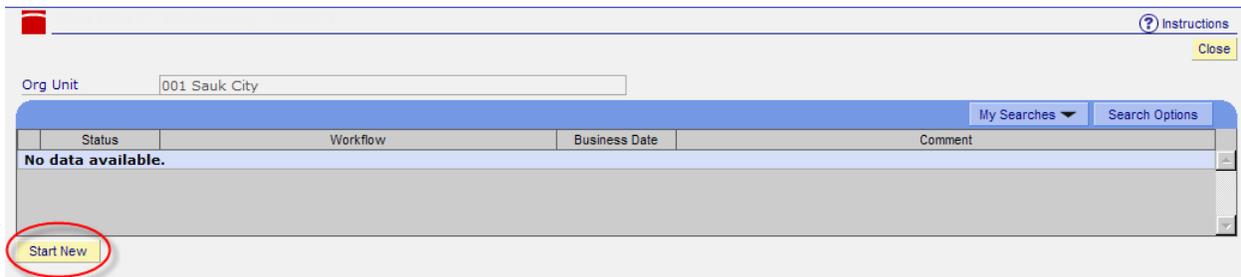
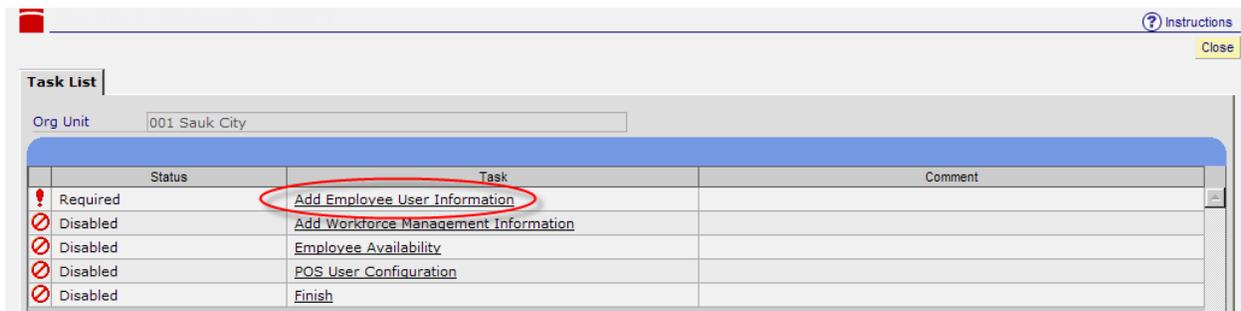


Employee Setup Workflow

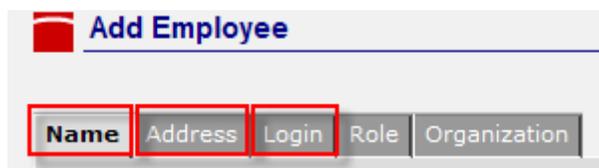
A new feature in the back office system (BOS) is the **Employee Setup Workflow**, located in the **Workforce Management** folder. This workflow walks you through setting up a new employee. Using this workflow you will no longer have to use the Related Links drop down menu. Once you have accessed the workflow *click* on the **Start New** button located in the lower left hand corner.



The Workflow **Task List** will appear: To begin adding a new team member *click* on the underlined **Add Employee User Information** task.



The **Add Employee** screen will appear. Fill in the information in each tab as you currently do. **Name**, **Address** and **Login Tabs** have not changed.



Employee Setup Workflow *continued*

A new field to be filled in under the **Role** tab is **Default Role**. Match the role assigned, to their **Default Role**. If a team member has multiple roles, the higher role should be their **Default Role**.

The screenshot shows the 'Add Employee' form with the 'Role' tab selected. The 'Default Role' dropdown menu is open, showing 'Team Member' selected. A red arrow points from the dropdown to the 'Team Member' role in the list below, which is also checked.

Role
<input type="checkbox"/> Employee Payroll Management.
<input type="checkbox"/> External Accounting.
<input type="checkbox"/> External Payroll Management - no sales.
<input type="checkbox"/> External Payroll Management.
<input type="checkbox"/> Inventory Manager
<input type="checkbox"/> Owner
<input type="checkbox"/> Owner - WFM
<input type="checkbox"/> Restaurant Manager
<input type="checkbox"/> Restaurant Manager - WFM
<input type="checkbox"/> Restaurant Manager Limited Salary View
<input type="checkbox"/> Restaurant Manager Limited Salary View - WFM
<input type="checkbox"/> Restaurant Manager w/o Salary View
<input type="checkbox"/> Restaurant Manager w/o Salary View - WFM
<input type="checkbox"/> Schedule Manager
<input type="checkbox"/> Shift Manager
<input checked="" type="checkbox"/> Team Member

The **Organization Tab** also has a new field (**Default Org**) that will need to be filled in. Team members that work in a single restaurant the **Org Unit** and **Default Org** are the same.

The screenshot shows the 'Add Employee' form with the 'Organization' tab selected. The 'Default Org' dropdown is set to '001 Sauk City (BU)'. The 'Org Unit' dropdown is also set to '001 Sauk City'.

Org Unit	Level
<input checked="" type="checkbox"/> 001 Sauk City	BU

End of data.

Employee Setup Workflow *continued*

For team members who work in multiple restaurants, you should ensure each restaurant they need to have access to is checked. Their “Home” restaurant should be the **Default Org.**

Add Employee Show Task List Instructions
Save & Continue Cancel

Name Address Login Role **Organization**

Default Org: 001 Sauk City (BU)

Org Unit	Level
<input type="checkbox"/> Goetz S	Franchisee
<input checked="" type="checkbox"/> 001 Sauk City	BU
<input checked="" type="checkbox"/> 003 Baraboo	BU
<input checked="" type="checkbox"/> 005 Middleton	BU
<input type="checkbox"/> 038 Spring Grn	BU

The Restaurant they are in the most

If a team member needs access to multiple restaurants, they will need to be assigned the owner’s **Hierarchy Level** in the **Default Org** along with the appropriate restaurants checked.

Add Employee Show Task List Instructions
Save & Continue Cancel

Name Address Login Role **Organization**

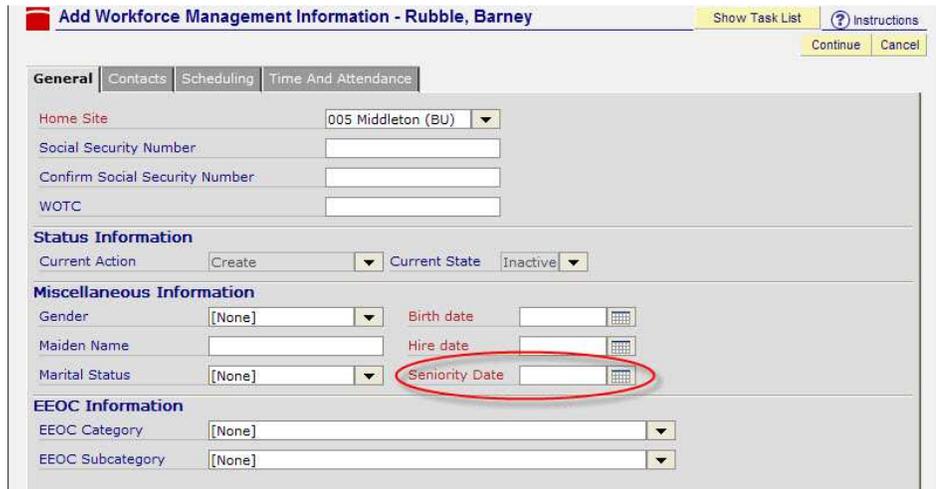
Default Org: Goetz S (Franchisee)

Org Unit	Level
<input checked="" type="checkbox"/> Goetz S	Franchisee
<input checked="" type="checkbox"/> 001 Sauk City	BU
<input type="checkbox"/> 003 Baraboo	BU
<input checked="" type="checkbox"/> 005 Middleton	BU
<input type="checkbox"/> 038 Spring Grn	BU

When finished with the **Organization Tab** click on **Save & Continue**.

Employee Setup Workflow *continued*

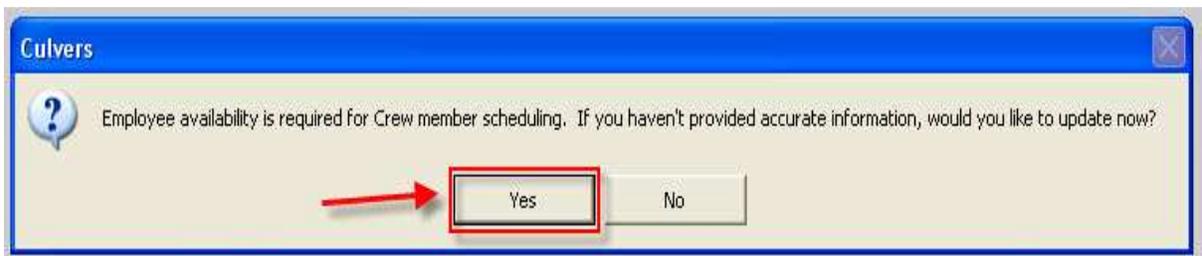
The **Add Workforce Management Information** screen will automatically appear. The **Seniority Date** (a new field) will auto fill as you enter the **Hire Date**. If, for some reason, the dates are different each field can be edited. Continue filling in the information in the tabs across the top. Skip the **Scheduling Tab** as you will not be able to add the team member's availability yet. When finished with the **Time and Attendance Tab** click on **Continue**.



The screenshot shows a web form titled "Add Workforce Management Information - Rubble, Barney". At the top right, there are buttons for "Show Task List", "Instructions", "Continue", and "Cancel". The form is divided into several sections: "General" (Home Site: 005 Middleton (BU)), "Social Security Number", "Confirm Social Security Number", "WOTC", "Status Information" (Current Action: Create, Current State: Inactive), "Miscellaneous Information" (Gender: [None], Birth date, Maiden Name, Hire date, Marital Status: [None], Seniority Date - circled in red), and "EEOC Information" (EEOC Category: [None], EEOC Subcategory: [None]).

Assign Primary Job task will open. There are no new fields associated with this, after completing click on **Save & Continue** in the upper right hand corner.

Once the primary job is assigned and saved, you will be prompted to fill in the team member's availability. Click **Yes** in the prompted box and it will automatically take you back to the **Scheduling** tab and allow you to enter their availability.



Enter the team member's availability to match when they are available to work. Click **Save & Continue** in the upper right hand corner when finished.

The **POS User Configuration** and **POS Security Role** screen will open. Complete these steps as you currently do, *click Save & Close*.

POS User Setup - Bird, Big

POS User Configuration | **POS Security Role**

Employee Member Id: BBird4
POS PIN: 166588
Clock In PIN: 18642
Operator Mode: Cashier - Clock In Not Required
Primary Job: A Team Member
MSR Number:
Tag Number:
Safe Drop Alert Amount:

POS User Setup - Bird, Big

POS User Configuration | **POS Security Role**

- Access All
- Cashier
- Drive Thru Cashier
- Shift Manager
- Limited D/T Cashier
- Discount Only
- Access All +New SMA

To Finish the Employee Setup Workflow, *click* on **OK**. An employee download is still required for the changes to take place on the registers.

Task List

Org Unit: 001 Sauk City

Status	Task	Comment
Complete	Add Employee User Information	- Bird, Big 1135980
Complete	Add Workforce Management Information	- Salary assigned.
Complete	Employee Availability	- Task complete.
Complete	POS User Configuration	- Bird, Big
Required	Finish	

Message from webpage

Press OK to complete the hiring workflow for this employee.

OK Cancel