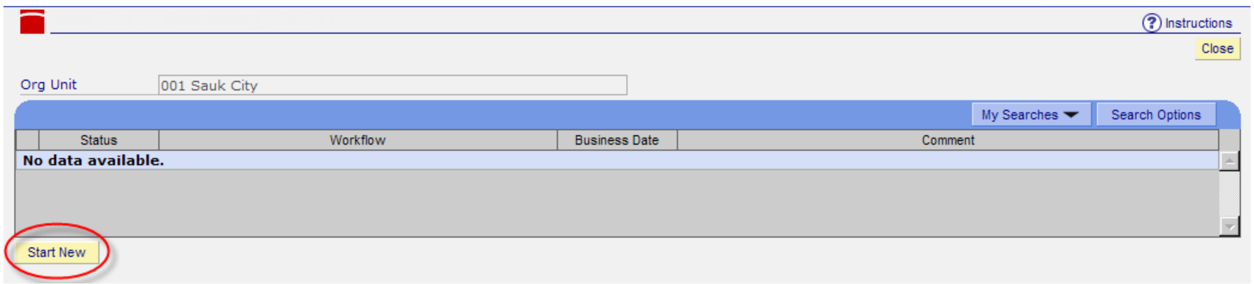
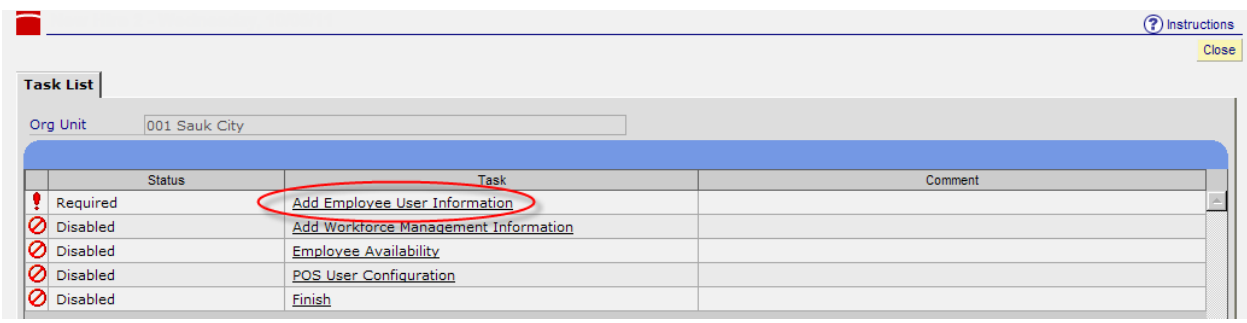
Employee Setup Workflow

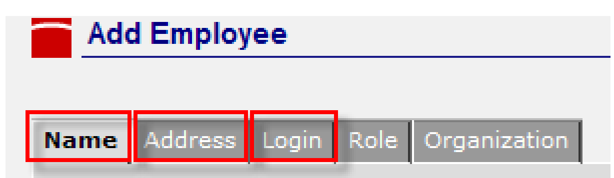
A new feature in the back office system (BOS) is the **Employee Setup Workflow**, located in the **Workforce Management** folder. This workflow walks you through setting up a new employee. Using this workflow you will no longer have to use the Related Links drop down menu. Once you have accessed the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

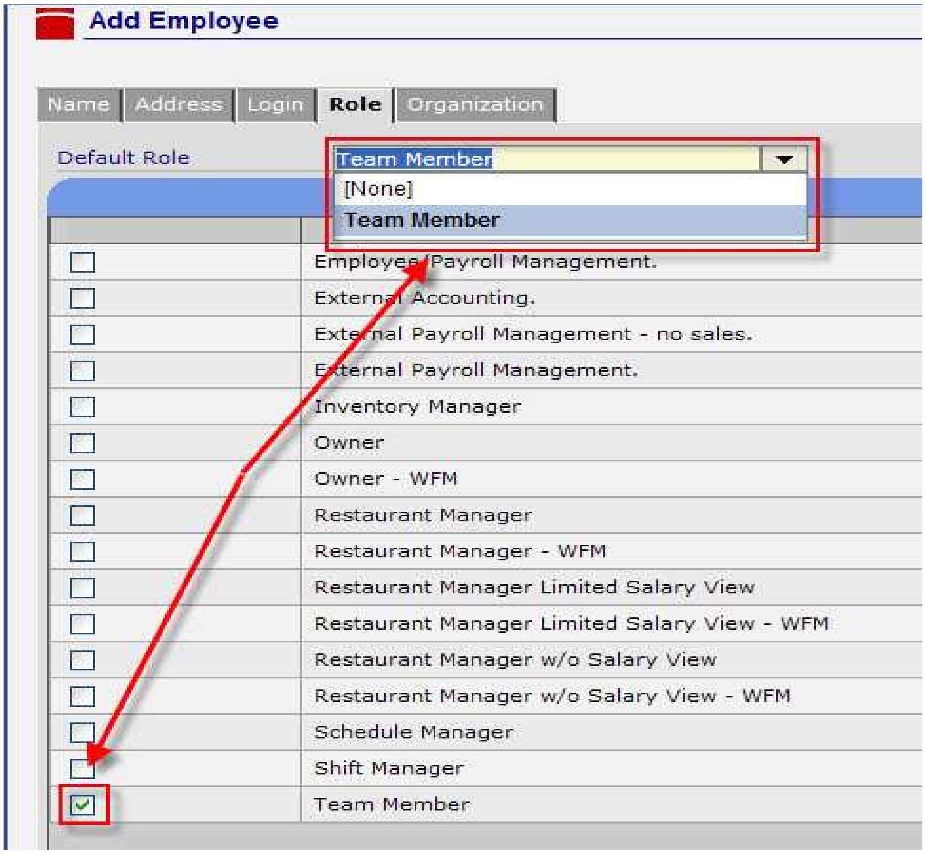


The **Add Employee** screen will appear. Fill in the information in each tab as you currently do. **Name**, **Address** and **Login Tabs** have not changed.

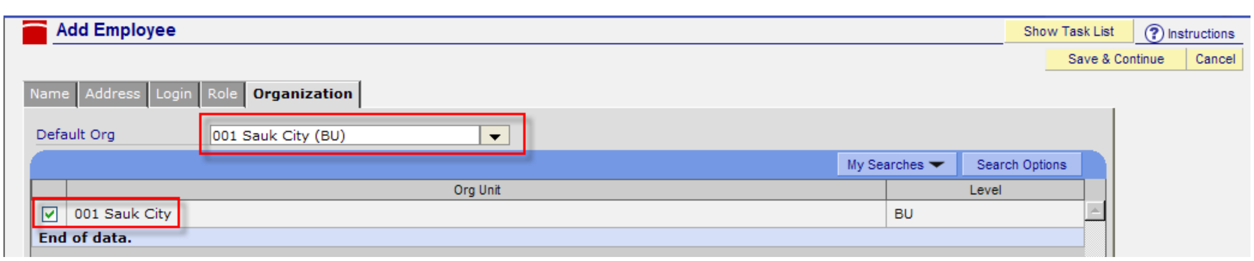


Employee Setup Workflow *continued*

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**.

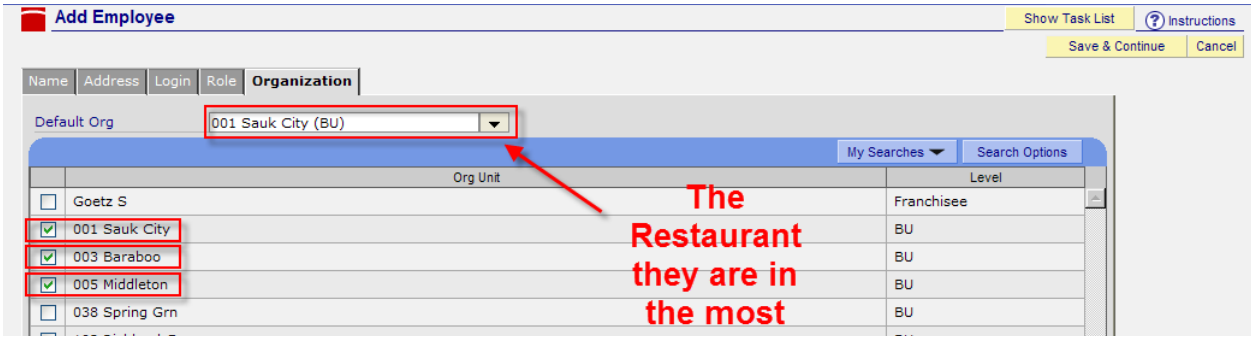


The **Organization Tab** also has a new field (**Default Org**) that will need to be filled in. Team members that work in a single restaurant the **Org Unit** and **Default Org** are the same.

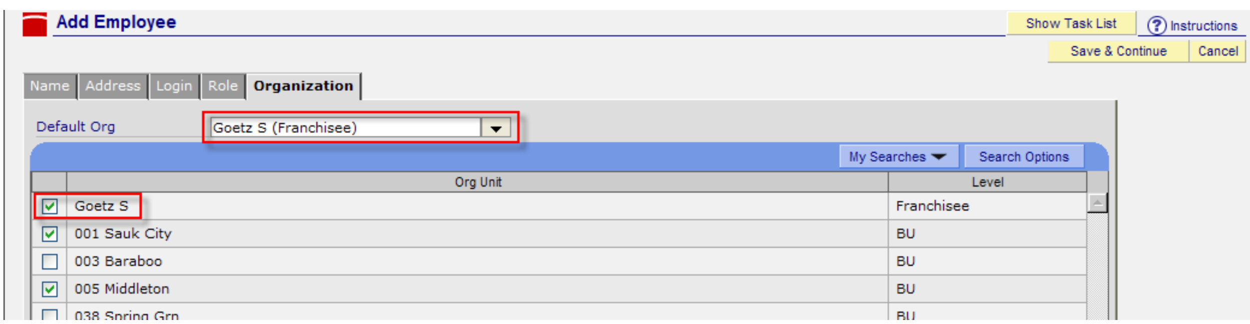


Employee Setup Workflow *continued*

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.**



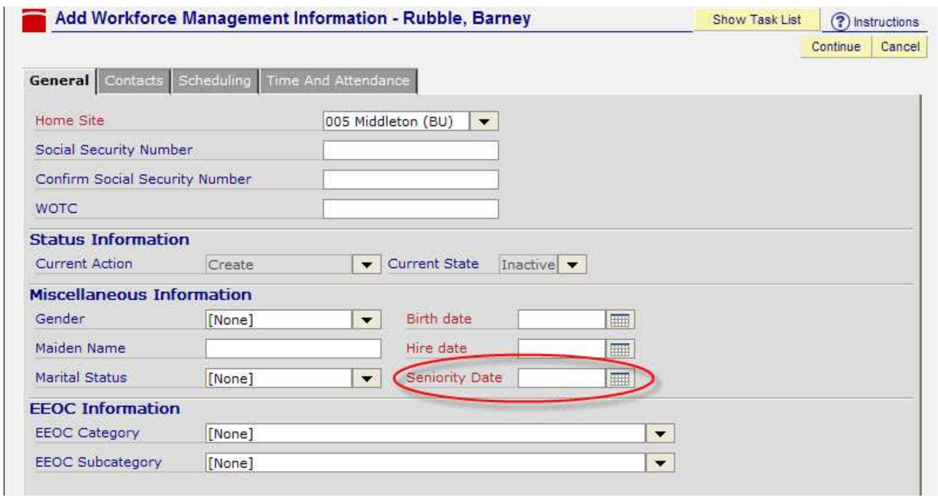
If a team member needs access to multiple restaurants, they will need to be assigned the owner's **Hierarchy Level** in the **Default Org** along with the appropriate restaurants checked.



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

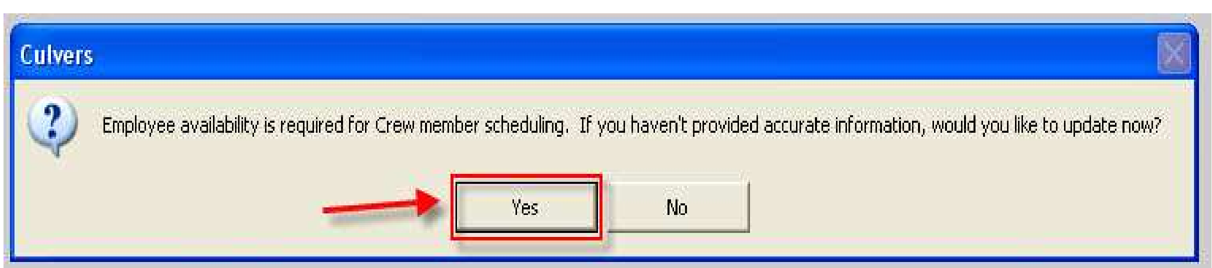
Employee Setup Workflow *continued*

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**.



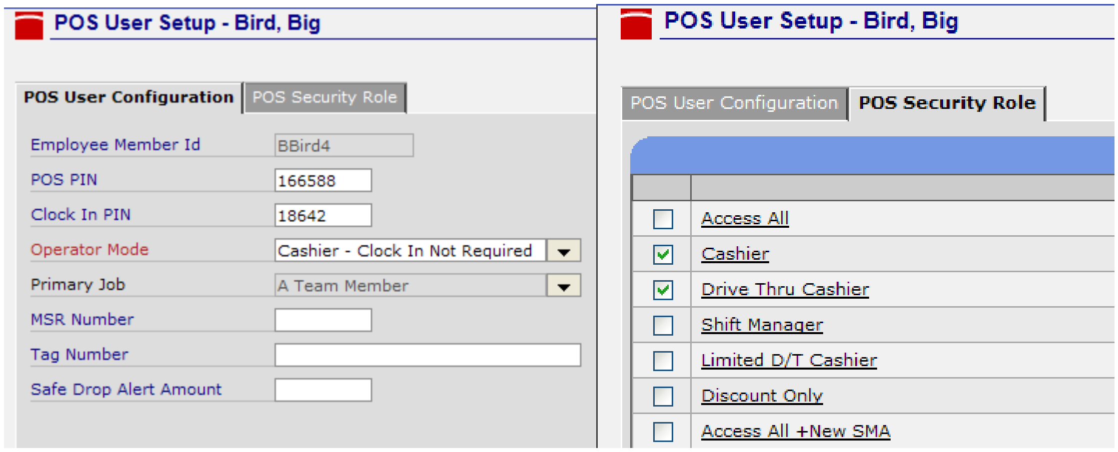
Assign Primary Job task will open. There are no new fields associated with this, after completing *click* on **Save & Continue** in the upper right hand corner.

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**.



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