# Employee Management

2017 - Spring Edition

## User Guide - Table of Contents

# Overview

The Employee module allows a Club to manage an Employee's contact information, job codes, security, areas, and other fields pertinent to the Employee.  Within the module, new employees can be added by replicating an existing role at the club, or by adding a new position at the Club.  Additionally, employee access and status can be controlled within this module.

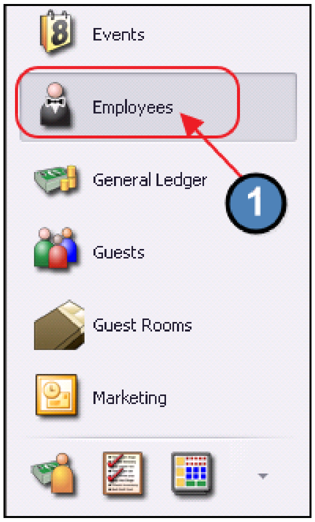
## Use Case(s)

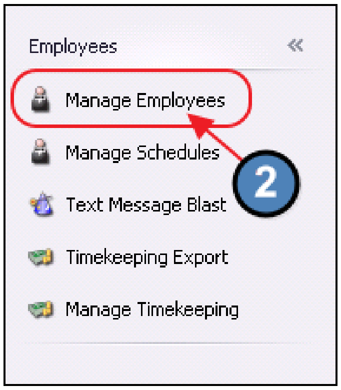
A new Manager of Food and Beverage started at the Club today.  Management will add the new employee to the database, and will model the employee after the former F&B Manager.  Care will be taken to ensure the former F&B Manager (who resigned), can no longer access the database.

# Accessing the Tools

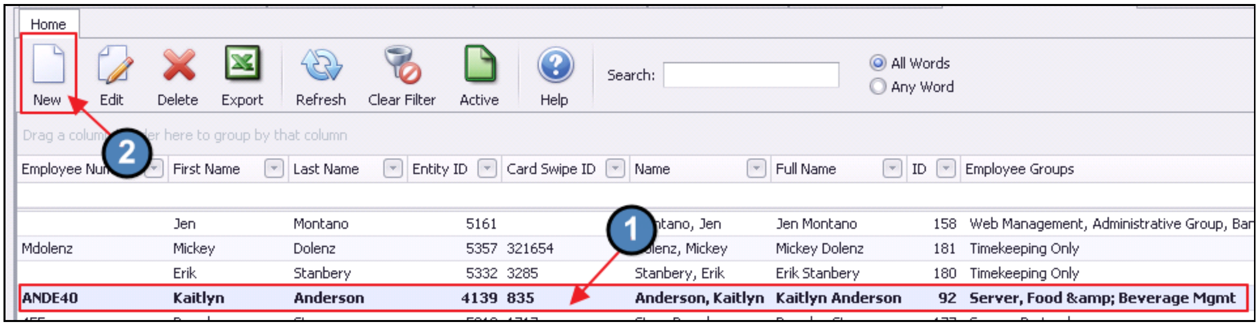
Employee Management tools are located within the **Manage Employees** section in the **Employee Module**.  To access:

1) Click on **Employees** (By default, the **Manage Employees** grid will launch)
2) If entering from another area from within Employees, click on **Manage Employees**



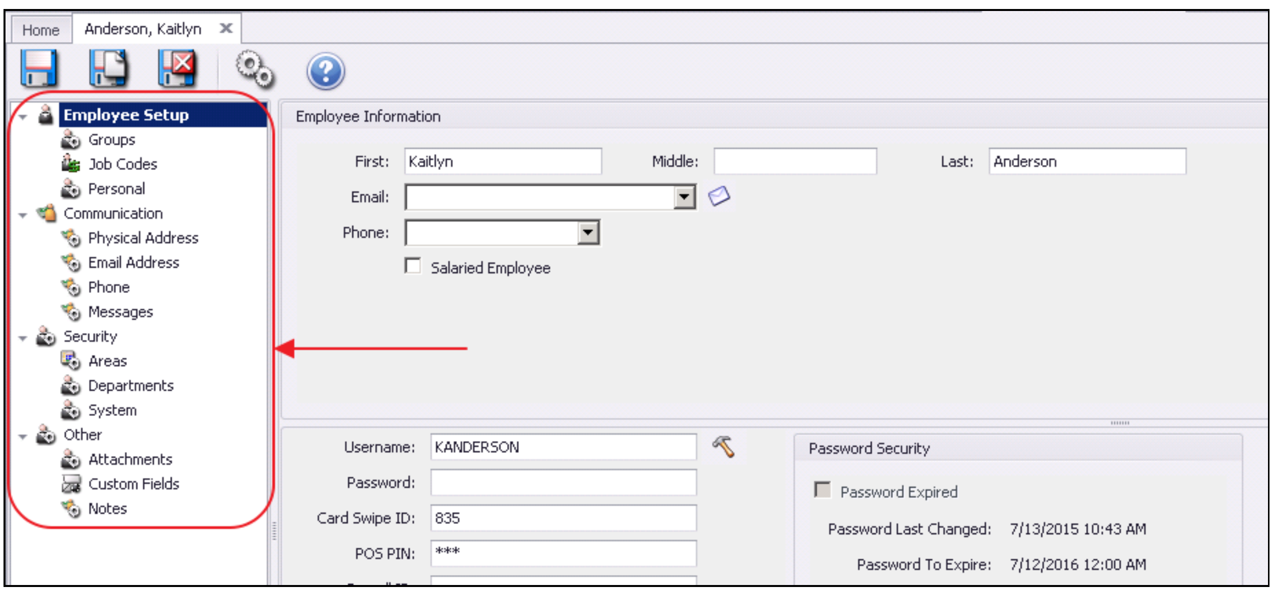

The **Manage Employee** data grid will launch.  The primary functions associated with managing employee setup are embedded in the tabs of the Employee profile, which can be accessed by double-clicking on an existing employee, or clicking the **New** button.




Once clicked, the Employee Profile screen will launch.

# Employee Profile - Tab Overview

Gaining an understanding of the Employee Profile tabs and their contents, is crucial to being able to carry out Actions associated with Employee Management (described later in this document). Within the Employee Profile, the following tabs are available for viewing/populating. (Note: Screen will originally open to **Security - System** tab, however, we will cover the tabs in the order presented.)




## Employee Setup

The Employee Setup tab contains the most basic Employee information:

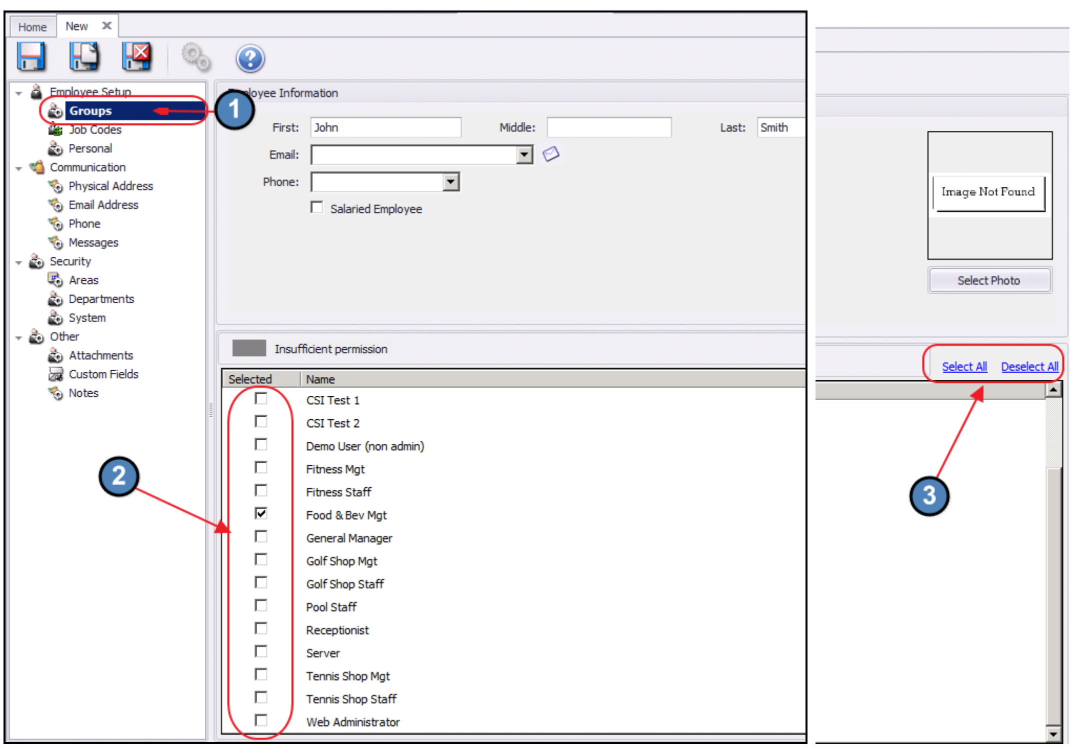
1) **First**, **Middle** (Optional), and **Last Name**
2) **Email and Phone**: Once added (on the Communications tab), data will be visible on this tab, and if more than one option is added, the “default” values may be specified.

3) **Salaried Employee** designation - If checked, the employee will have no clock in/ out options at the POS.
4) **Photo** - If desired, a photo of the Employee may be added. Click **Select Photo** and browse to the correct file to add.


The bottom section of the tab contains System log-in information and will be covered in the System section of this document.

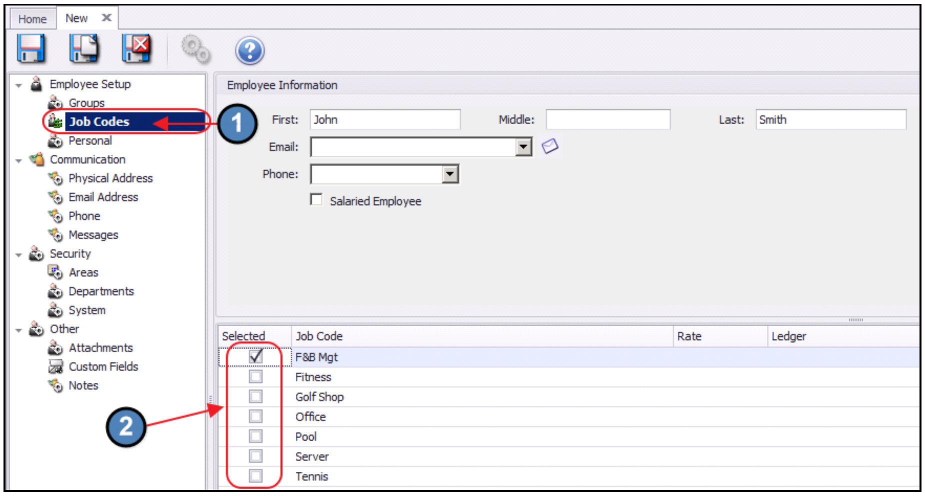
## Groups

Select the applicable **Employee Groups** on this tab. **Employee Groups** are designed as a shortcut (and best practice) to assign **Security**, **Area**, and **Departmental** rights all at once, rather than on an individual basis. Please see our **Employee Groups Manual** for more information on their setup. Note the **Select All** and **Deselect All** buttons on the right to assist with assignment and unassignment.



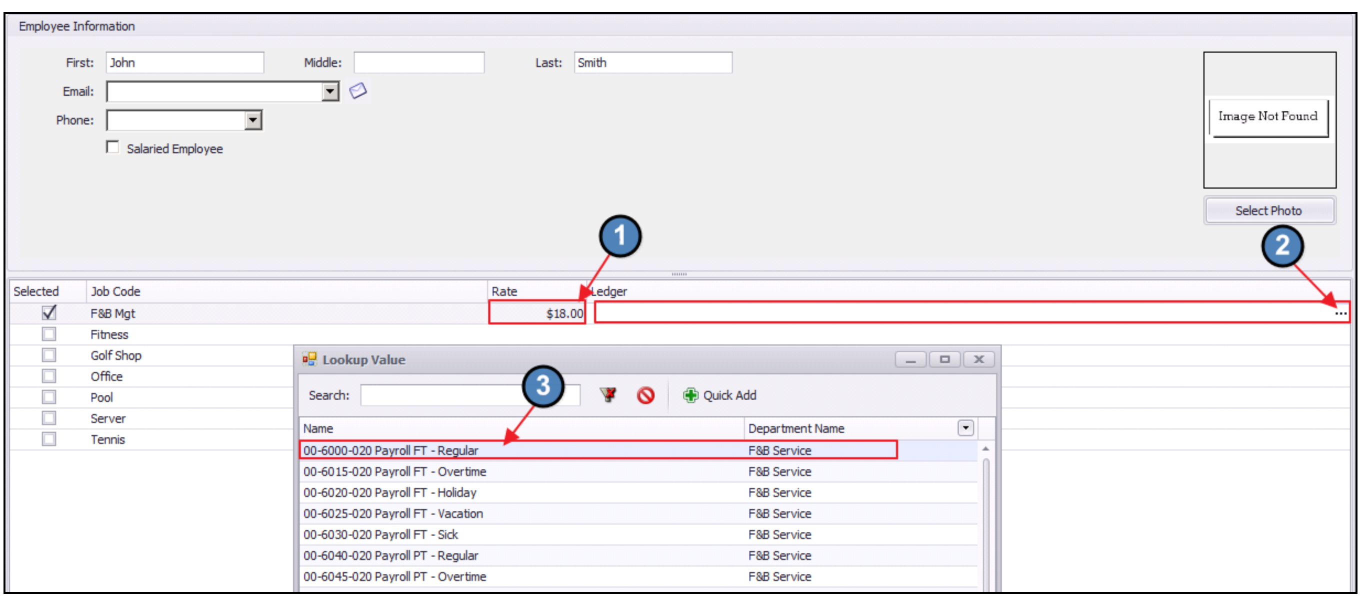
## Job Codes

**Job Codes** are used to track hours worked within the timekeeping system. Select the Employee's applicable **Job Codes** on this tab. Please see the **Job Codes manual** for more information on their setup.




Although it is best practice to add the **Rate** and **Expense Payroll Ledger** at the **Job Code** level, they can be added on an individual basis here.

- To add a **Rate,** click to select the **Rate** field and type the appropriate dollar amount. This rate will be on an hourly basis.
- To add an **Expense Payroll Ledger**, click the ledger lookup button (three dots) and select the appropriate ledger. The **Expense Payroll Ledger** is simply for **reporting** purposes, it will not produce any type of Journal Entry.

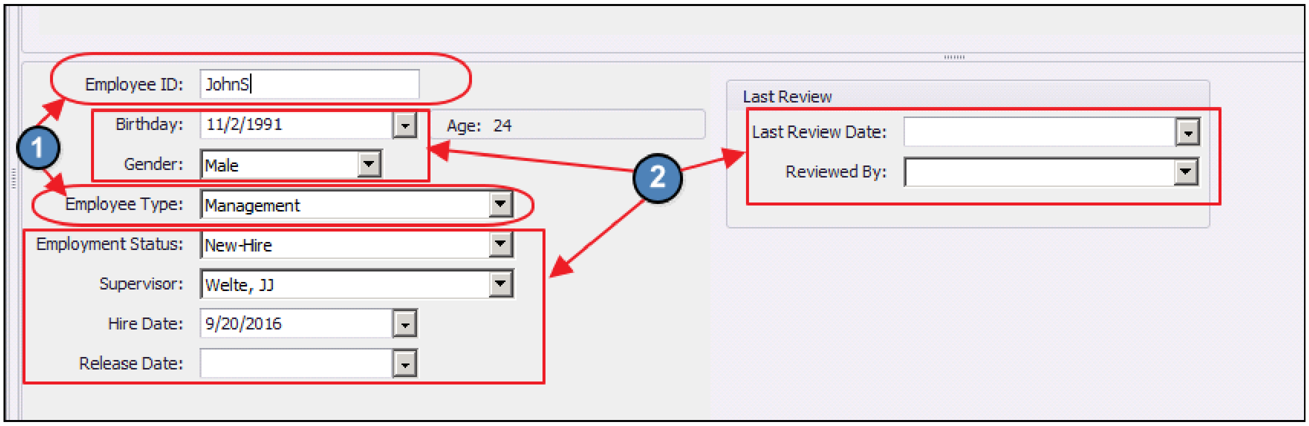


### Personal

This tab contains additional personal information about the Employee. The **two required fields** on the tab are below:

- **Employee ID**- The information entered here is how the employee will be referenced on Posting Summaries. **DO NOT LEAVE BLANK**. Typically this is first name & last initial (can be preceded with a number)
- **Employee Type** – **MUST** select **ONE** (typically full or part time)

The system also offers optional fields for **Birthday, Gender, Status, Supervisor, Hire Date, Release Date, Last Review Date and Reviewed By.**

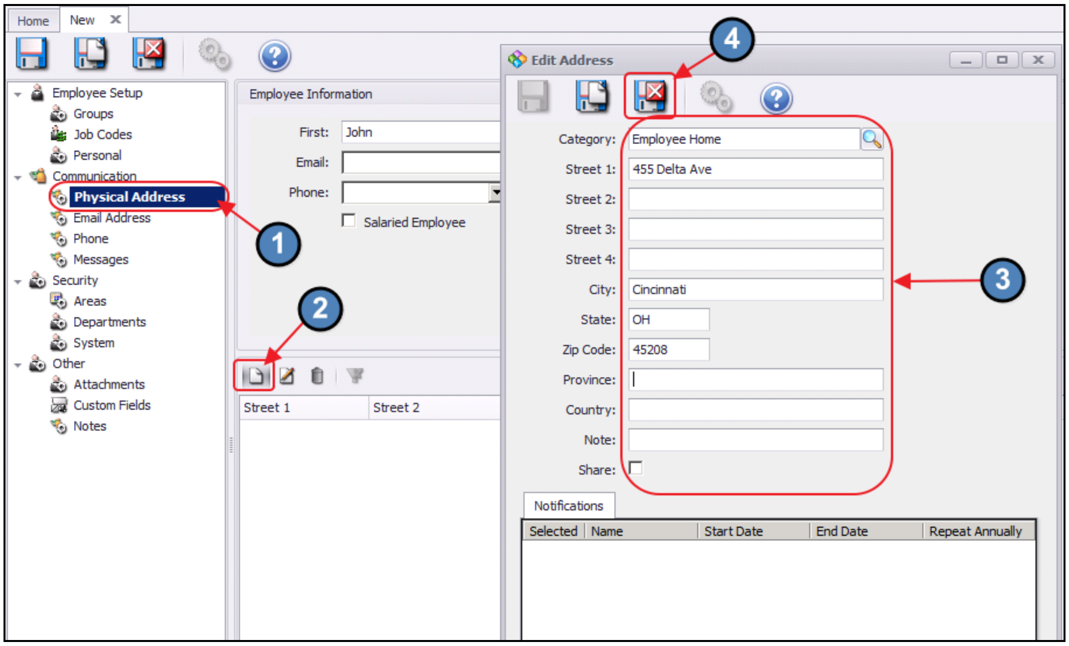



## Communication

The Communication tabs contain the primary ways to reach the employee. Information populated on the sub-tabs within this section is viewable in summary on the **Communication** tab.

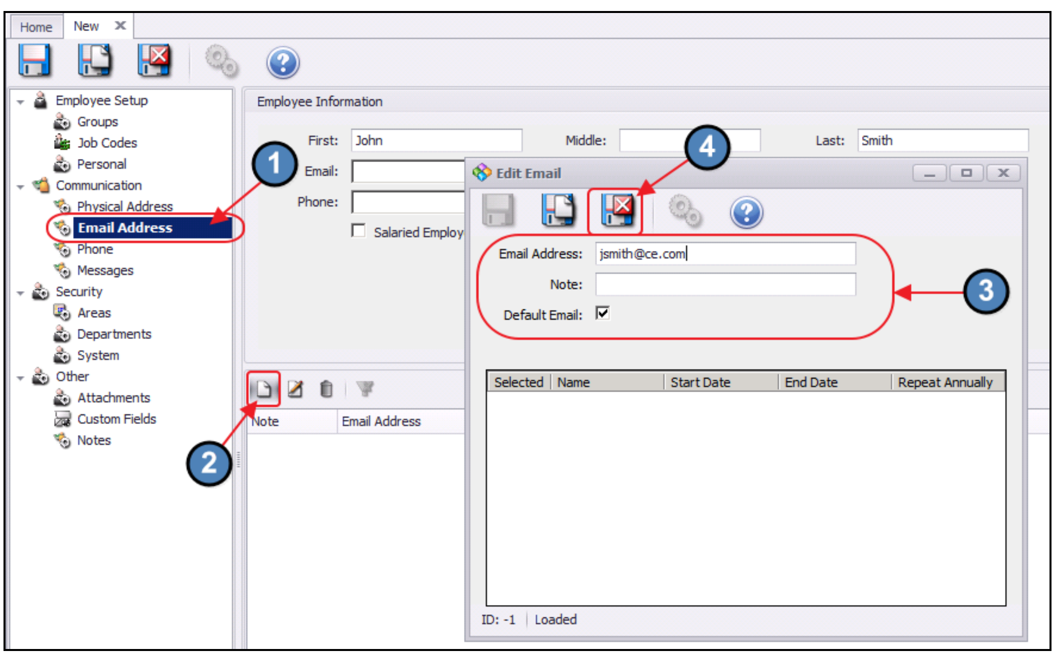
### Physical Address

This tab contains the physical address(es) of the Employee. To enter a new **Physical Address,** navigate to the **Physical Address tab**, click the **New** icon, enter the address, and click **Save and Close**. Addresses may be populated at any time, and are not required. Note: The **Share** flag is not applicable to employees.



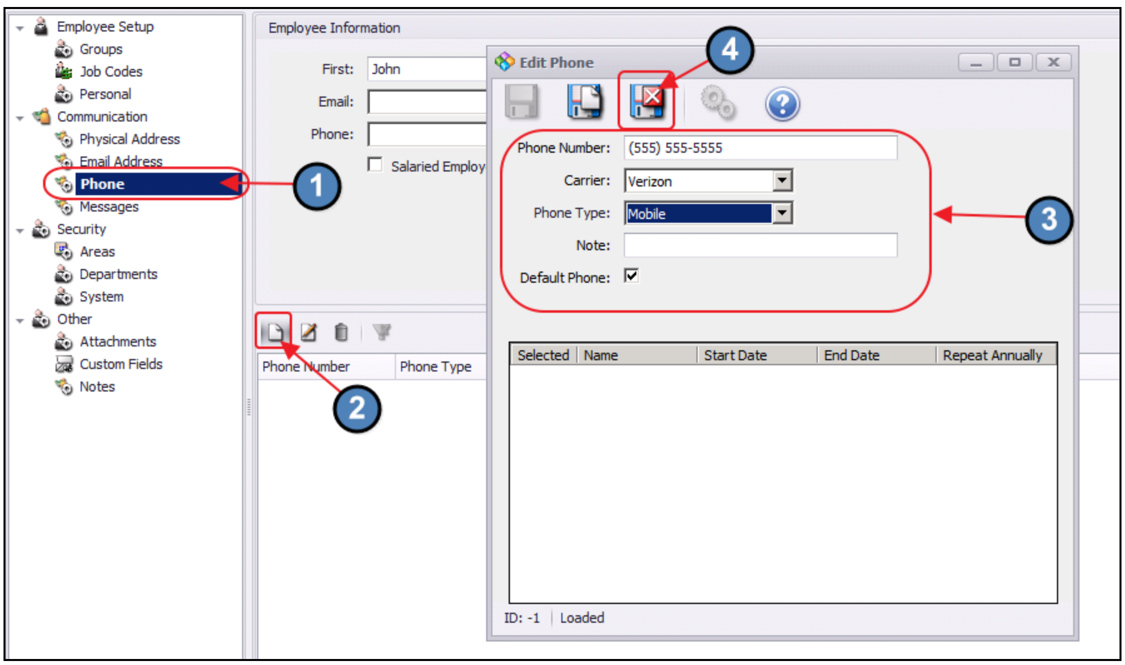

## Email Address

This tab contains the email address(es) of the Employee. To enter an **Email Address** (optional)**,** navigate to the **Email Address tab**, click the **New** icon, enter the email address and add a **Note** if desired. **Default Email** will be checked for the first email address entered, however, can be changed. One email address must be marked as **Default**, as it will predominantly be used when sending emails through Office. When finished, click **Save and Close**. Email addresses may be entered at any time.



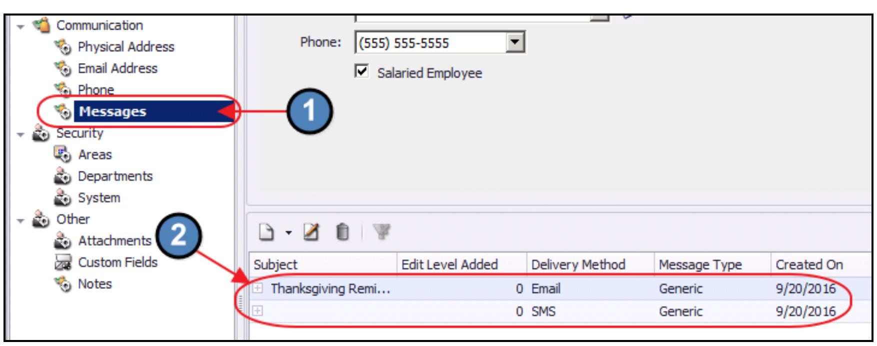
## Phone

This tab contains the Phone Number(s) of the Employee.  To enter a **Phone Number** (optional), navigate to the **Phone tab**, click the **New** icon, enter the **Phone Number**, **Carrier**, **Phone Type**, and add a **Note** if desired.  (Note: If Mobile is selected, specify Carrier to assist with sending Text messages to Employees through Office.  For more info, refer to the **Marketing** manual).  **Default Phone** will be checked for the first phone number entered, however, can be changed.  One phone number must be marked as **Default**, as it will predominantly be used for communication purposes.  When finished, click **Save and Close**.  Phone Numbers may be entered at any time.




## Messages

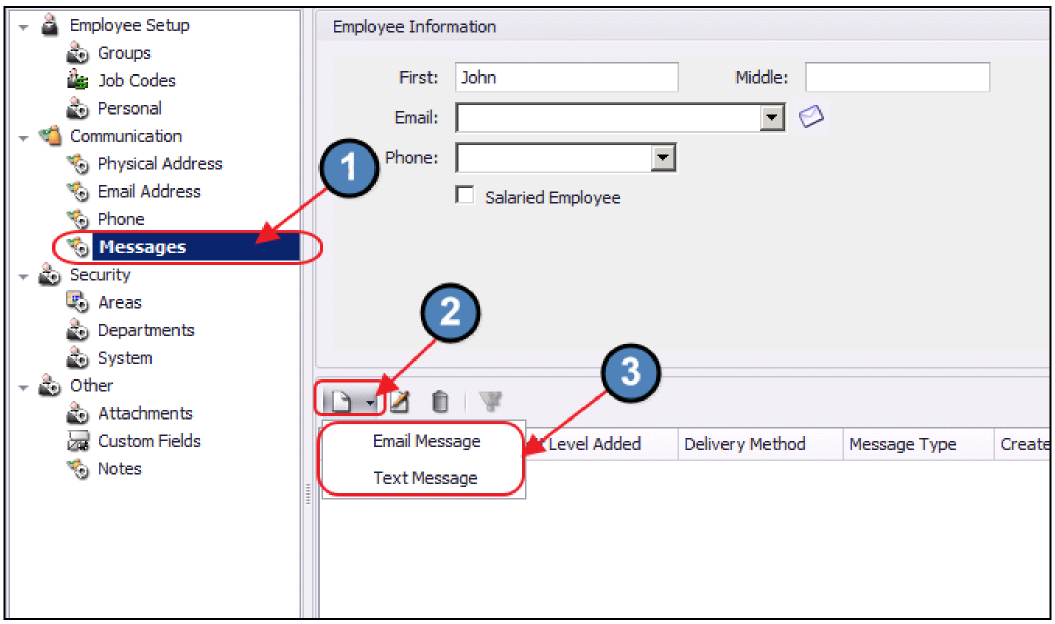
The **Messages** tab provides a way to send email or text messages to the Employee.  The tab also contains a summary view of the messages sent to the employee.



## Email or Text Employee

Although it is **recommended** to send emails and text messages through the **Marketing Wizard** (Please see our **Marketing Manual** for more information), emails and texts can be sent on an individual basis within the employee's profile.

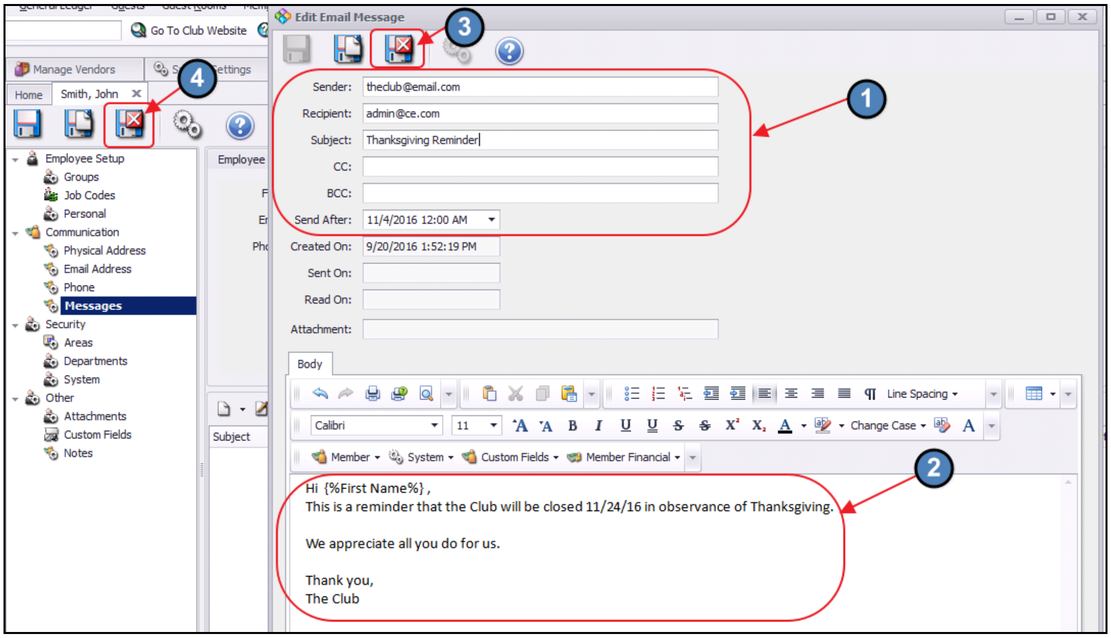
To do so, once on the **Messages** tab, select the **New** Icon and choose whether the message will be an **Email or Text Message.**




### Email Employee

If **Email Message** is selected, the user will be prompted to enter a **Sender address** (must be a valid email address), **Subject** (Optional), additional email addresses to include (either as carbon copy **CC**: or blind carbon copy **BCC**:), **Send After** (delay send feature) and the **Body** of the email message.  When finished, click **Save & Close**.

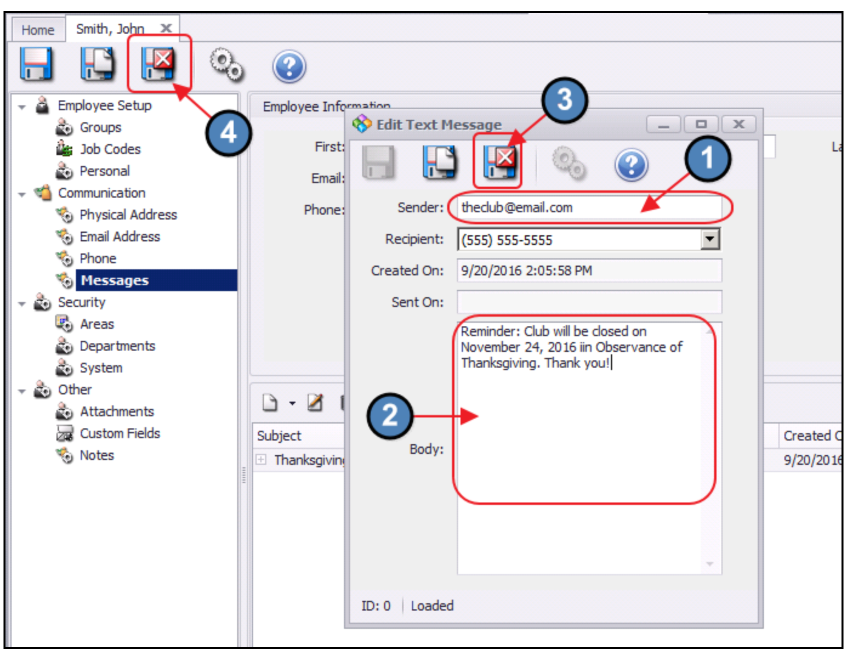
**Important**: Be sure to **Save & Close** the **Employee Profile** after you have Saved & Closed the email message.  **Saving the Employee Profile is what prompts the system to send the Email Message.**




## Text Message Employee

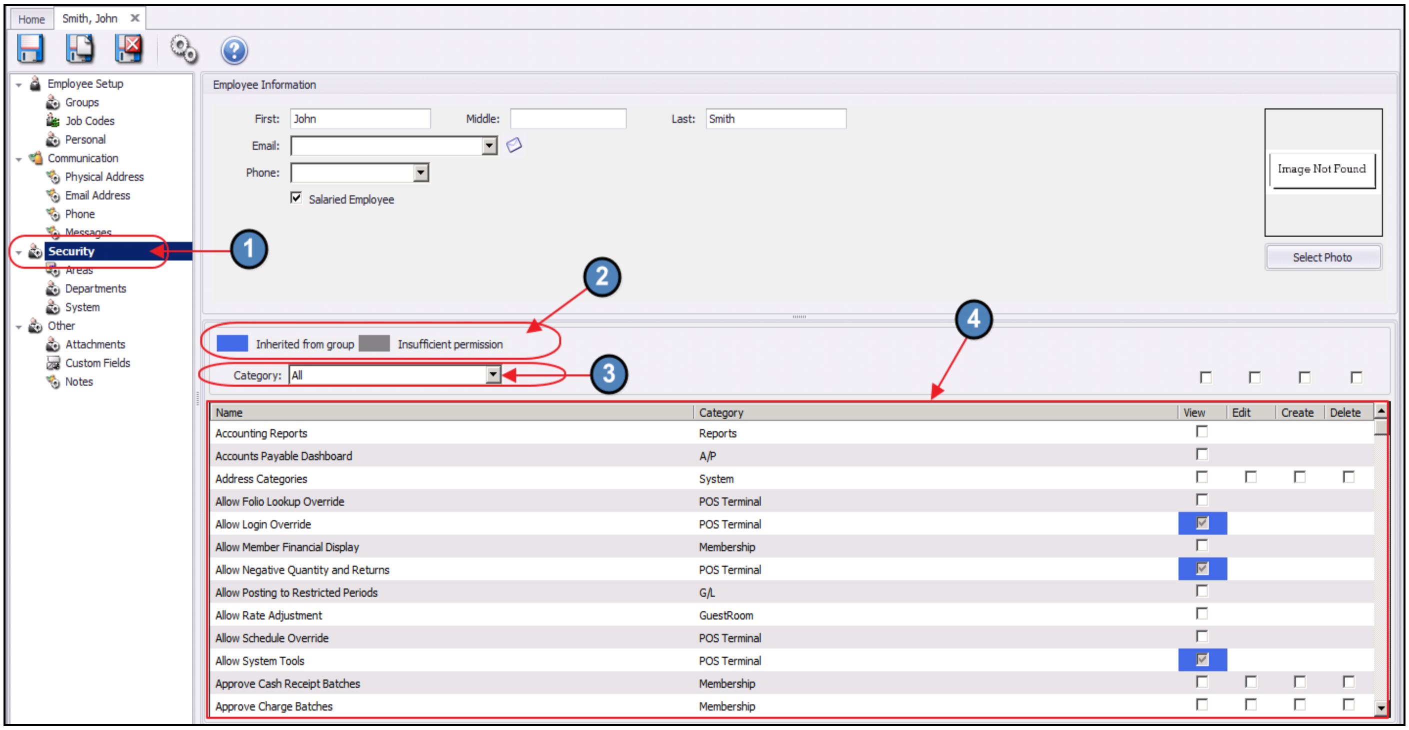
If **Text Message** is selected, the user will be prompted to enter a **Sender address** (must be a valid email address), select the **Recipient** (should be the mobile number on file), and enter the **Body** of the text message. When finished, click **Save & Close**.

**Important**: Be sure to **Save & Close** the **Employee Profile** after you have Saved & Closed the text message. **Saving the Employee profile is what prompts the system to send the Text Message.**



## Security

The **Security** section contains the security matrix as assignable to the Employee. The security summary can be viewed on the **Security** tab. Note that the matrix is color coded to help identify security privileges inherited from the group (blue), or show where insufficient privileges exist (gray). To view security matrix by Category, select the drop-down to select specific Category to view. **Note:** Please see the **Security Rights Manual** for complete explanation of **Category** and **Security Rights**.



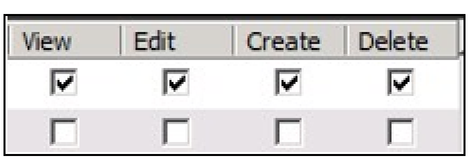

Most security rights, will have four permission levels with a corresponding check box. Check all permission levels that apply for each security feature. The permission levels include:

**View**- User will have a **view only** mode of the security feature.

**Edit**- User will be able to **edit** existing instances of the security feature.

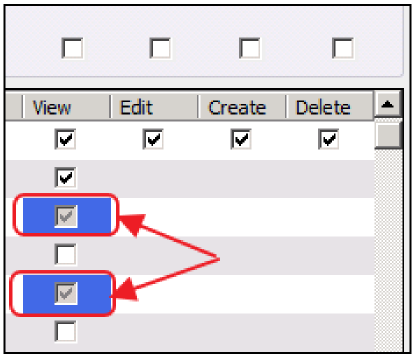
**Create**- User will be able to **create** new instances of the security feature.

**Delete**- User will be able to **delete** existing instances of the security feature.

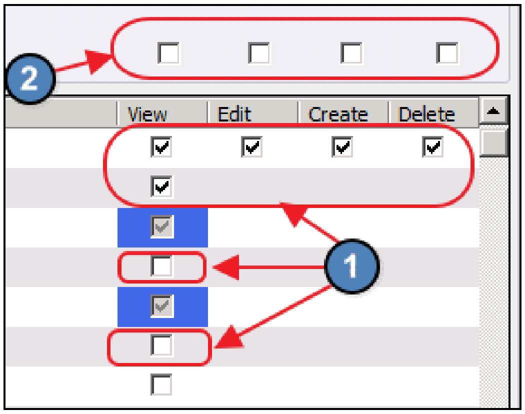


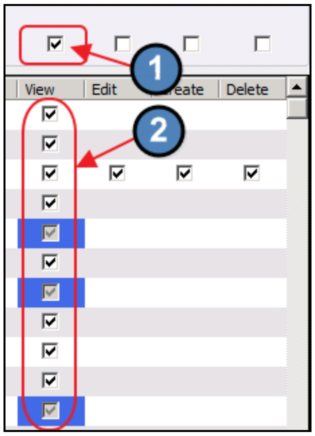
If there is not a check-box for the **Edit**, **Create**, or **Delete** permission levels, simply check the **View** permission level, and the employee will have full access to the security feature.


It is recommended that **Security rights** be applied at the **Employee Group** level.  This will allow the user to apply various security rights all at once (consistently), rather than on an individual basis (Please see our **Employee Groups Manual** for more information on their setup).  As previously mentioned, if a security right is Inherited from an Employee Group, the check box will be highlighted in blue, and the check mark in the box will be gray (indicating the permission cannot be edited, as it is inherited).




There may be situations in which an employee will need additional security rights, not inherited from their Employee Group.  If this is the case, an **Administrator** can navigate to the specific security right and check the corresponding permissions on an individual basis.  Also note the row of (4) check boxes above the matrix.  This allows for easy assignment of **View, Edit, Create**, and/or **Delete** functions for all visible functions.  For example, clicking the first box, will assign **View** permissions for all listed functions.



## Areas

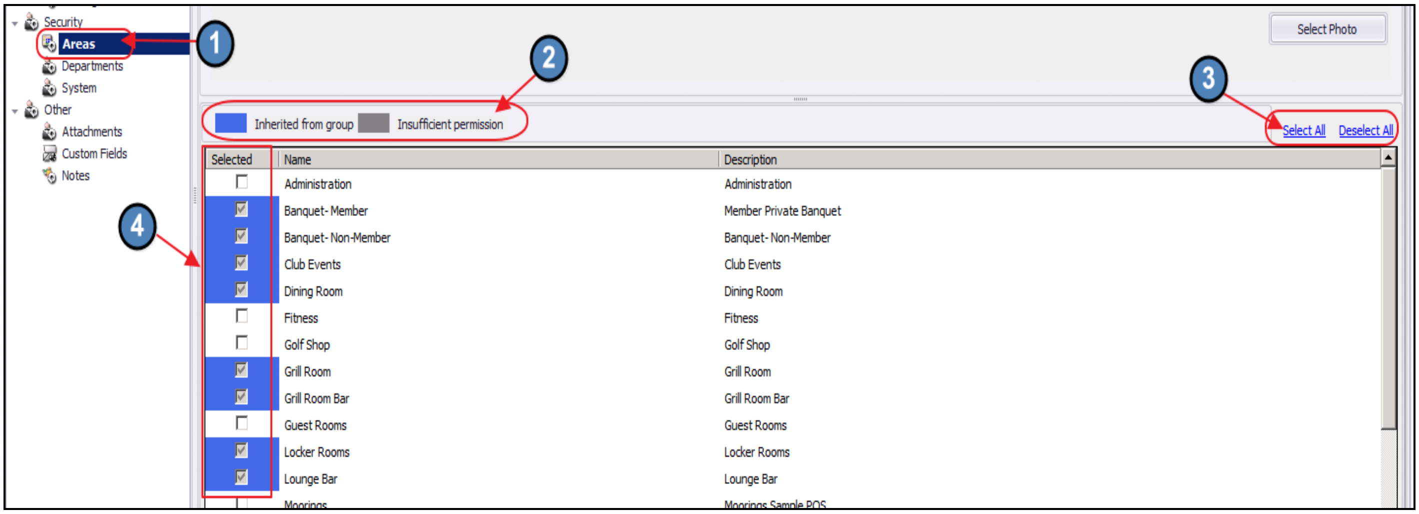
The **Areas** Tab contains which areas the Employee can access in the POS, as well as the reporting module.

Furthermore, for employees to see specific items within the **Items** module, they will need rights to the **Areas** linked to the corresponding **Item Categories**. This is most often used to prevent F&B employees from seeing Retail items and vice versa.

Again, it is recommended to apply areas at the **Employee Group** level to help quicken the employee setup process (Please see our **Employee Groups Manual** for more information on their setup).

**Areas** inherited from an Employee Group, will be highlighted in blue.

While not recommended, individual permissions may be applied if necessary by selecting the required areas. The **Select All,** and **Deselect All** buttons are available to assist with quick assignment and unassignment.




## Departments

**Employees** must have rights to at least **one department**. The **Departments** Tab is used for security purposes. More specifically, the **Departments** tab can be used to hide certain aspects of the system from employees. Please see examples below:

- **Supervisors**- In the **Employees** module, **supervisors** will only be able to see employees in **departments** to which they have been granted access.

- **GL Accounts**- To see certain **GL accounts**, employees must have rights to the **department(s)** flagged within the **GL account**.

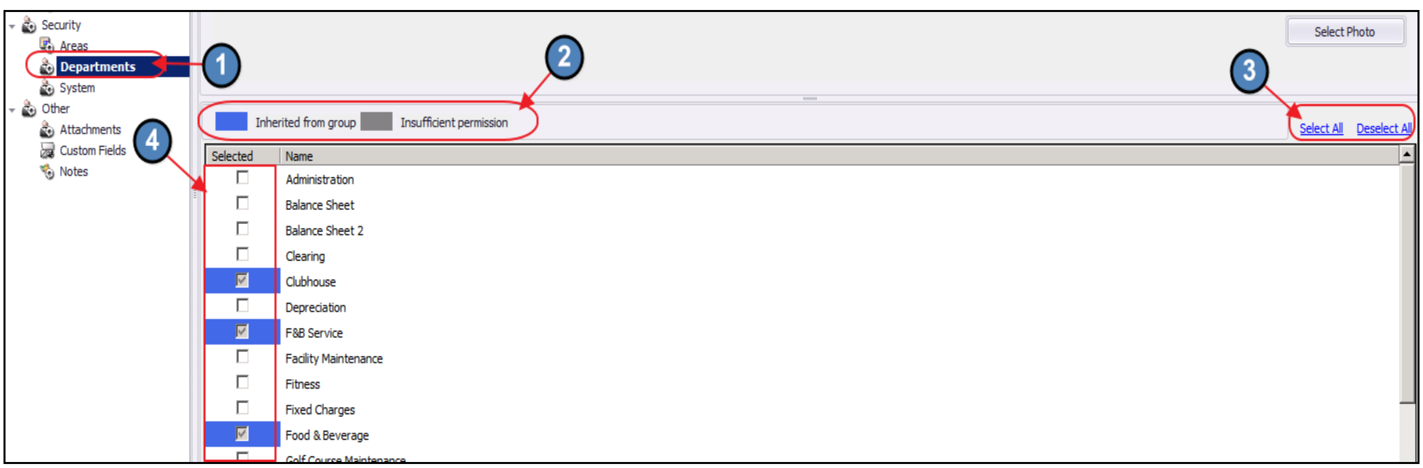
- **Vendors**- To see certain **vendors**, employees must have rights to the **department(s)** flagged within the **vendor profile**.

- **Companies**- With the new **multi-company** capabilities, to see anything associated with a specific **company**, the employee will need rights to a **department** that is linked to that **company**.

- **Members/ Member Types**- With the new **multi-company** capabilities, **Member Types** are linked to a specific **company**. To see any **Members** or **Member Types** associated with a specific company, the employee must have rights to a **department** linked to that **company**.

**Departments** Inherited from an Employee Group, will be highlighted in blue.

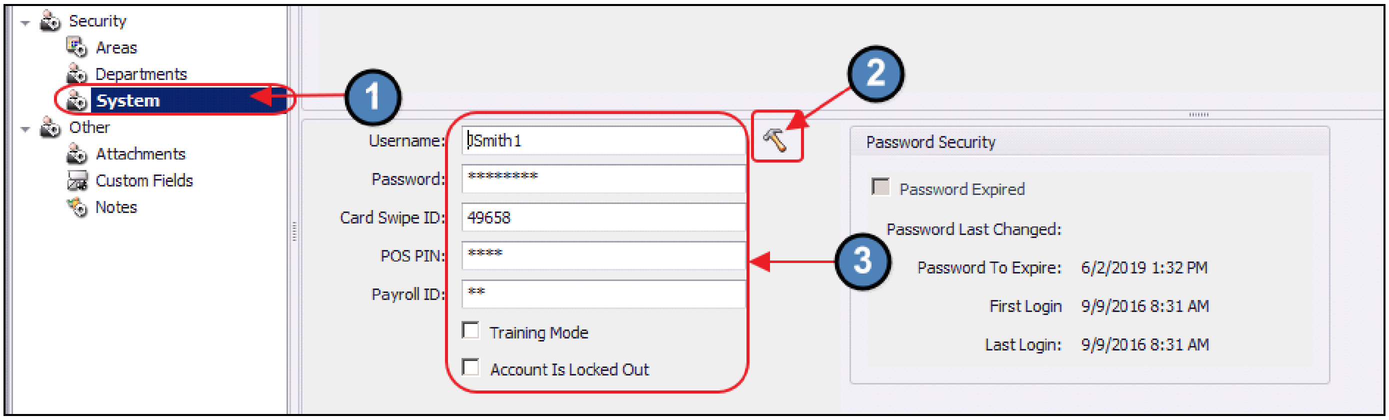
While not recommended, individual permissions may be applied if necessary by selecting the required Departments. Note that the **Select All,** and **Deselect All** buttons are also available to use for quick assignment and unassignment.




**Note:** For timekeeping purposes, an employee must have rights to the departments linked within the areas they will be working. For instance, if a server will be working in the Dining Room area, and the Dining Room area is linked to the Food & Beverage department, the server will need to have rights to the Food & Beverage department for timekeeping to report properly. If the employee does not have the correct departmental rights, they will not show on the **Employee Hours** report.

## System

The System tab controls login information for CMA and POS.  This is the default landing screen when clicking on the Employee's Profile.




- **Username**- Select the hammer icon to generate a unique login.  If selected, the hammer icon will produce default credentials of first initial & last name. This field is NOT case sensitive.
- **Password**- This is the password used for CMA.  A password **must** be assigned to every employee.  If password is **forgotten**, a new password can be entered here by an employee with the correct security rights.  This field is case sensitive.
- **Card Swipe ID**- This is the username for POS and **must** be numeric unless using an encoded card (because POS only prompts with numeric keypad to login). This field does NOT need to be assigned to employees who will not be using Timekeeping or POS.
- **POS PIN**- This is the password for POS, and not a required field unless exporting Timekeeping info to another system. This field can be the same as the **Card Swipe ID** – in which case the user will NOT be prompted for a password.
- **Payroll ID**- Only applicable if client exports Timekeeping to another system. Typically First Initial & Last Name.
- **Training Mode-** If checked, any completed POS charges will be put into a **test charge batch**. The system will not allow this batch to be posted to prevent skewed financials.

- **Account is Locked Out**- If checked, the employee will not be able to login to the POS or CMA. Ensure this setting is checked for Terminated employees.

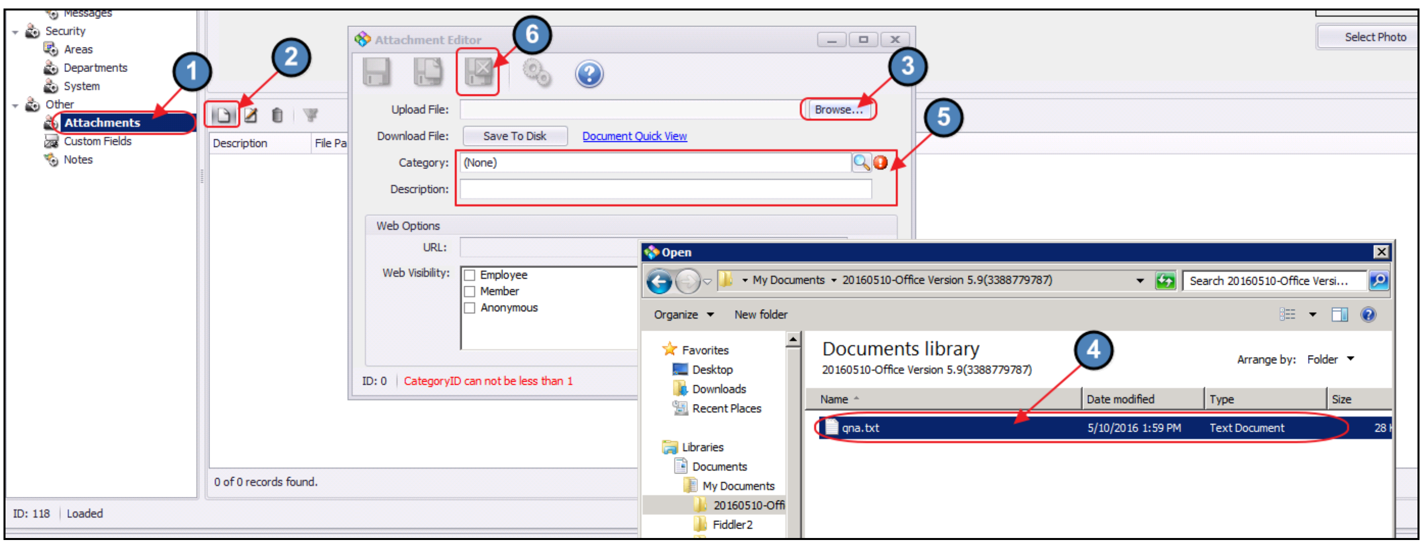
## Other Information Section

The Other information section contains information that does not apply to any other area, but is relevant to the employee.

### Attachments

The attachments tab allows for document attachment to an employee's file.

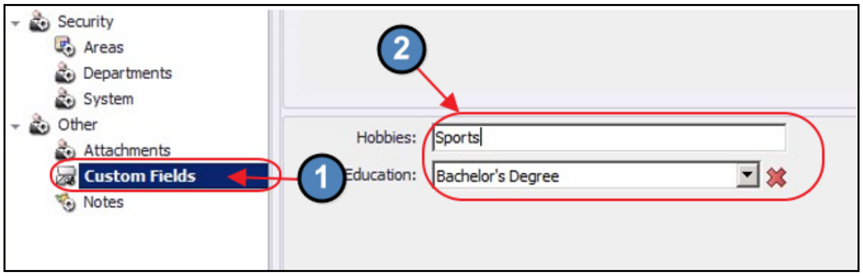
To attach a new document (such as the Employee's application), click the Attachments tab, click the **New** icon, browse for the document, complete the remainder of the Attachment Editor screen, and click **Save and Close** when complete.




### Custom Fields

Click on the **Custom Fields** tab to populate additional data regarding the Employee.

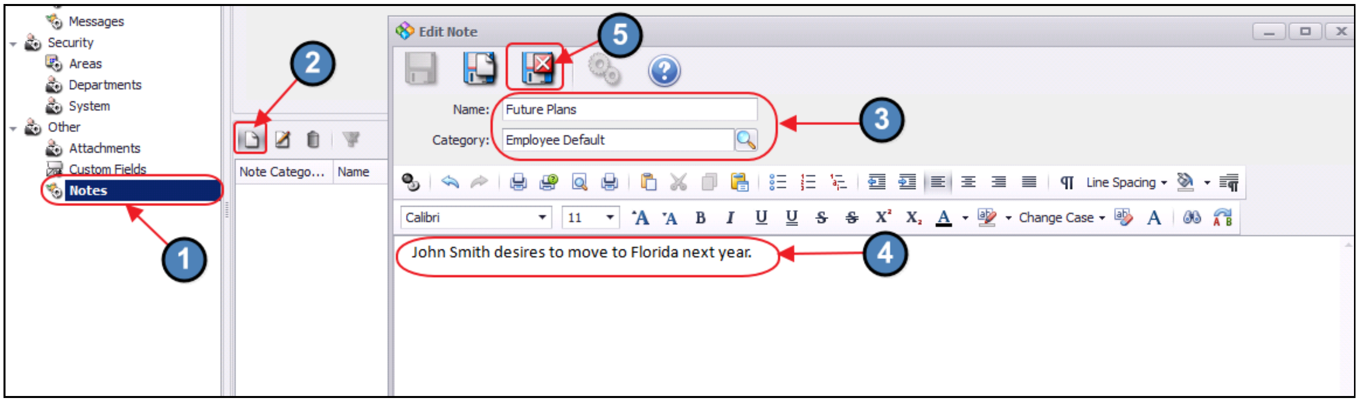
These Club defined fields allow a Club to capture additional items such as the Employee's Education Level, Hobbies, etc.




## Notes

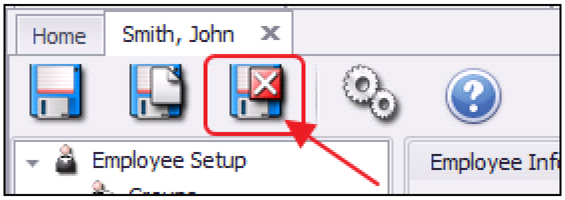
The Notes tab allows for additional free-form notes to be put on an Employee's Account.

To attach a note, click on the **Notes** tab, click the **New** icon, enter a **Name** and **Category** for the note, type/format the note, and click **Save and Close** when complete.




# Save and Close Reminder!

When finished editing any of the tabs, it is imperative to do a final **Save and Close** on the Member's Profile to ensure all changes saved on the tabs, are saved to the overall Profile.



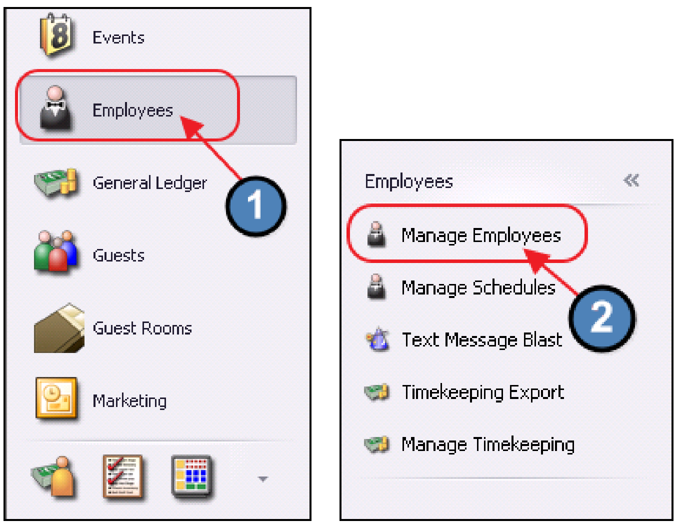
# Most Commonly Used Actions - Employee Mgmt

## Create Employee for an Existing Position

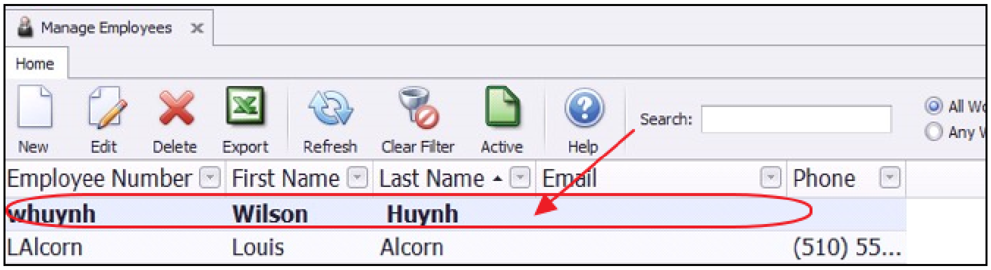
If a New Employee will perform the same/similar functions as an already existing employee, **best practice** (and quickest/easiest way to set up employee) is to copy the existing employee's setup.

To copy an existing employee,

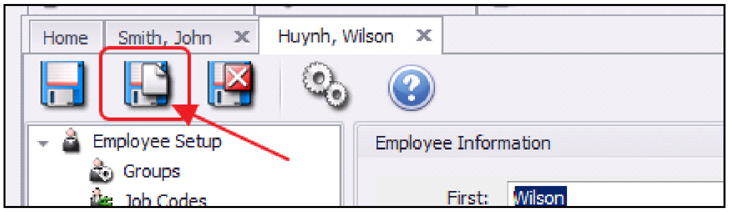
1) Click on **Employees** to load the **Manage Employees** Grid. (Or, if accessing from another **Employee** area, click **Manage Employees** from the **Employee** options).




2) Double-click on the **Employee** to copy from, to load their Employee Profile.



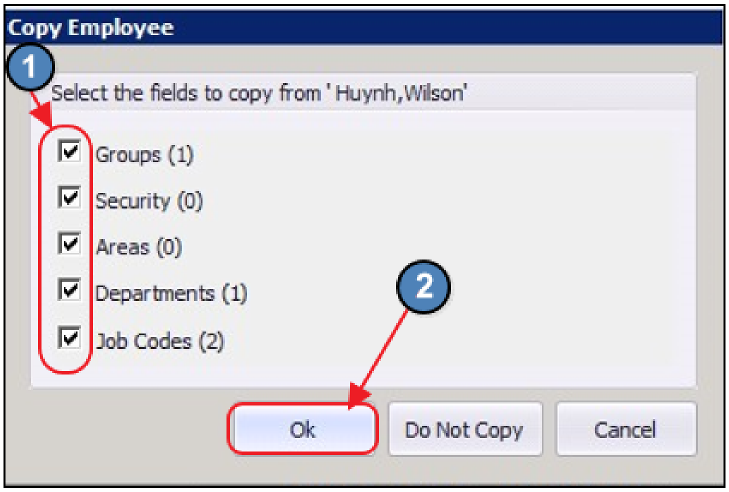

3) Once loaded, select the **Save and New** icon.



4) Select the relevant fields to copy, and then click **OK**.

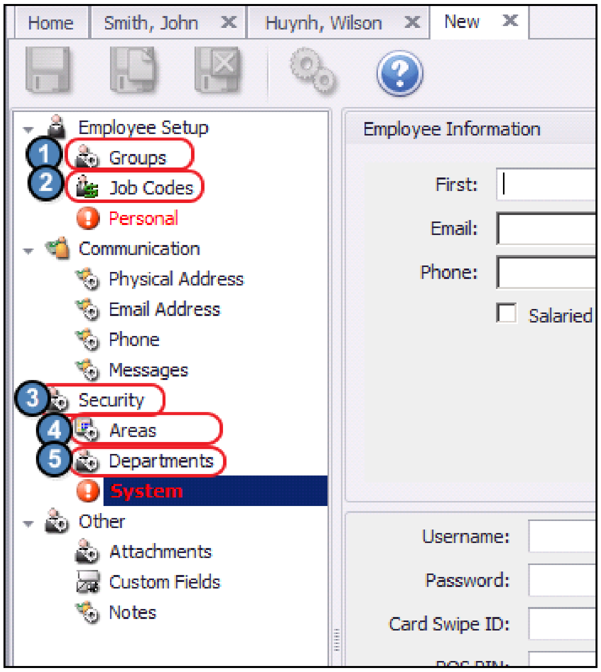
Applicable Fields include:

- Groups
- Security
- Areas
- Departments
- Job Codes

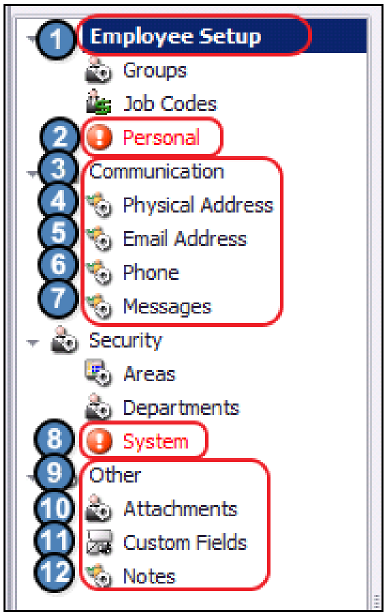



The Employee Setup screen will launch.

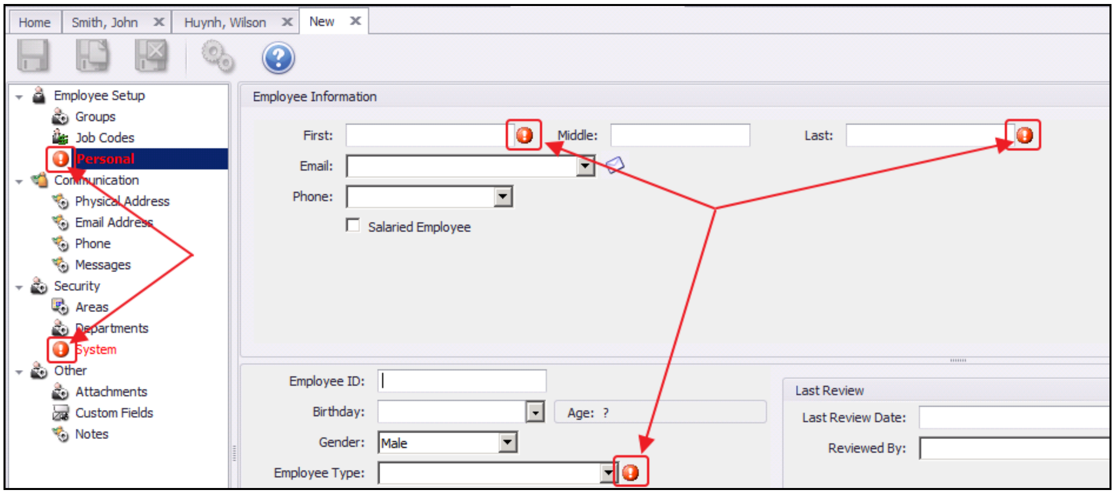
5) Next, **verify** that all copied information was transferred successfully on the (5) tabs highlighted below. Return to the **System** tab when completed.



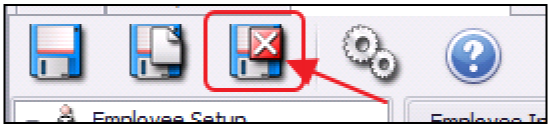
6) Complete set up, by entering relevant information on the additional tabs highlighted below, as outlined in the Employee Profile - Tab Overview section of this document.




**Reminder**: **Required** fields are highlighted with a white exclamation mark inside a red/orange circle.




7) When finished, click **Save and Close** on the Employee Profile to establish new employee in the system.

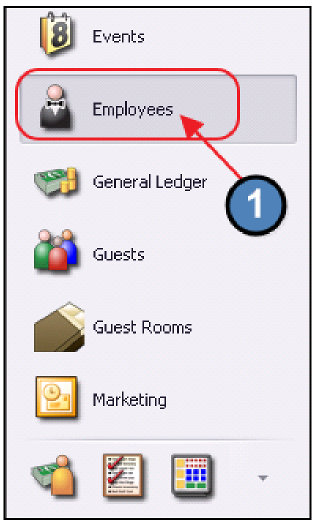


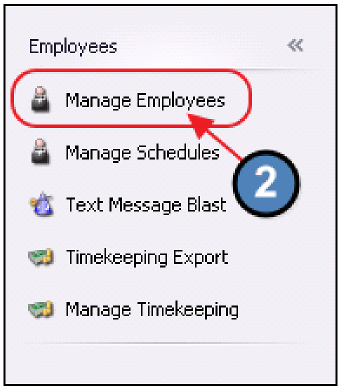
# Create Employee for a New Position

If an employee is hired for a completely new position, best practice is to first create a **new Employee Group** for the position. (Please see the **Employee Groups Manual** for more information on setup.)

Once the new **Employee Group** is created, please follow the below instructions to create a **new employee.**

1) Click on **Employees** to load the Manage Employees Grid. (Or, if accessing from another **Employee** area, click **Manage Employees** from the **Employee** options).

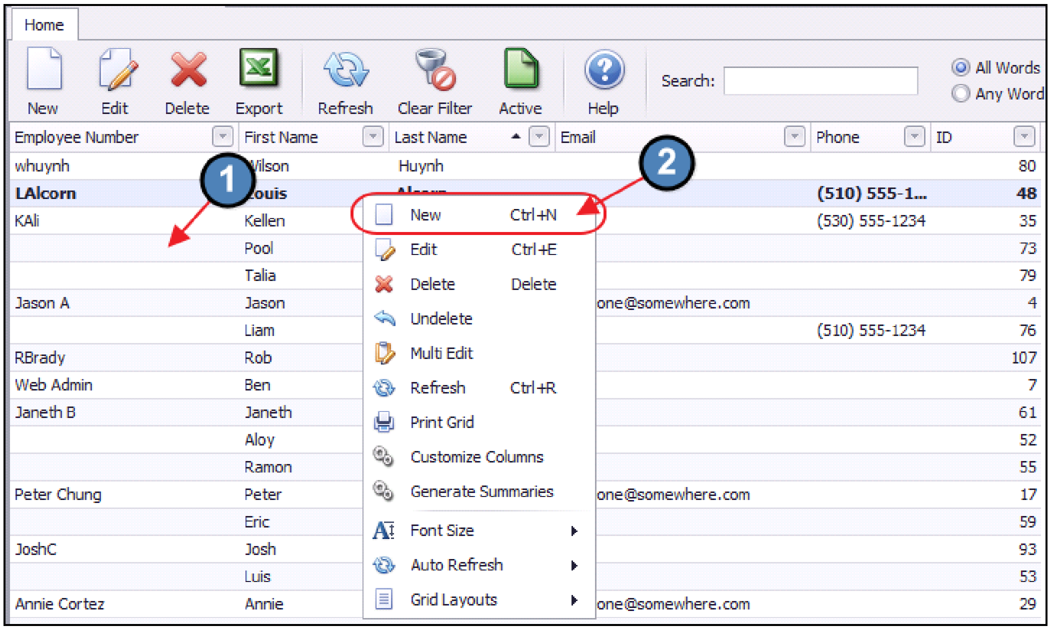



2) Then, perform either of the following to launch the Employee setup screen.

   a) Click the **New** icon on the toolbar.

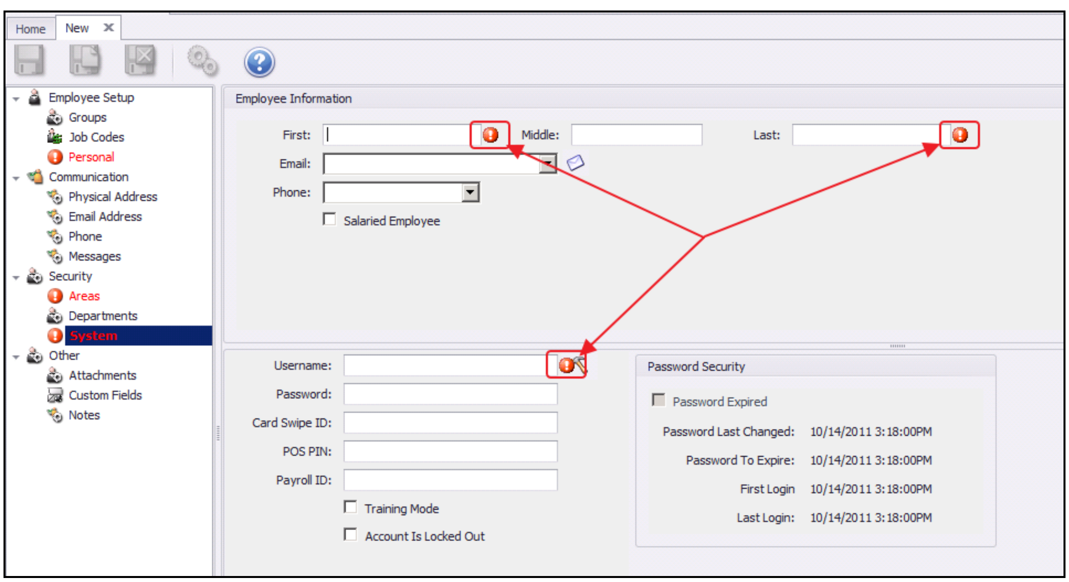

   b) Or, right-click anywhere on the **Manage Employees Grid** and select **New**.



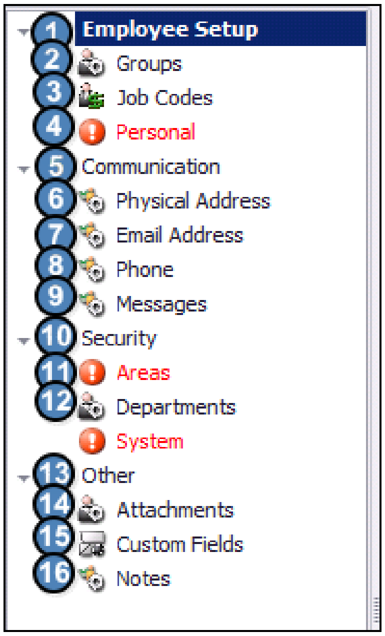

The Employee Profile (setup screen) will launch, and will open on the **System** tab.

3) Complete all necessary information on the **System** tab. (For more information on how to complete this tab, refer to the System section of this document.)

**Reminder**: **Required** fields are highlighted with a white exclamation mark inside a red/orange circle.

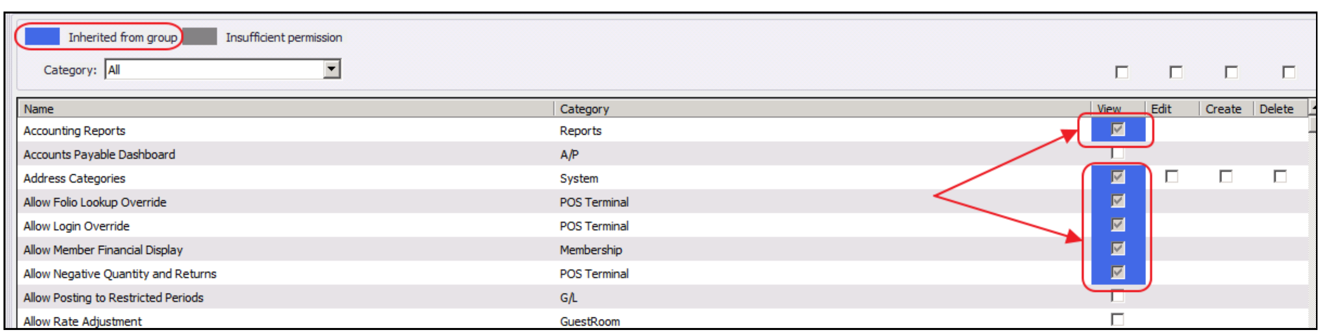


4) Next, complete set up, by entering relevant information on the additional tabs highlighted below, as outlined in the Employee Profile - Tab Overview section of this document. It is recommended that these tabs be entered in sequential order.




**Note 1:** On the **Groups** tab, remember to select the newly created **Employee Group**. This will populate all **Security**, **Area**, and **Departmental** rights.

**Note 2:** On the **Security - > Area**, and **Departments** tabs, verify that all rights were successfully transferred from the Employee Group. Rights inherited from an Employee Group, will be highlighted in blue.




5) When finished, click **Save and Close** on the Employee Profile to establish new employee in the system.

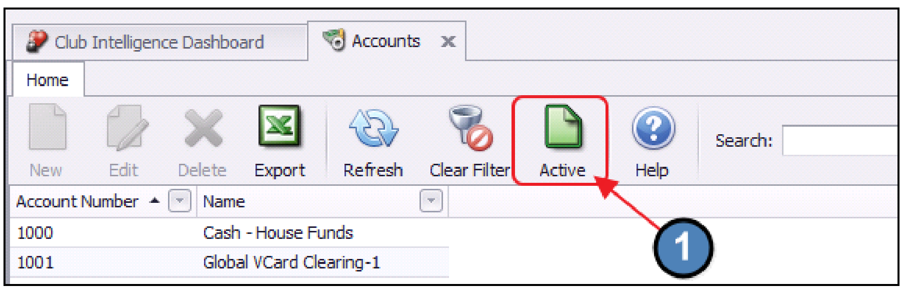
# Troubleshooting Area and Departmental Rights

In previous versions of the Office software, it was difficult to troubleshoot the necessary rights needed to see specific records of a particular module.  For instance, if an employee was unable to see a certain GL account, in previous versions, the user would first have to find an employee with rights to the GL account, determine what department(s) the GL account was linked to, and then proceed to find an Administrator who could add the necessary departmental rights.

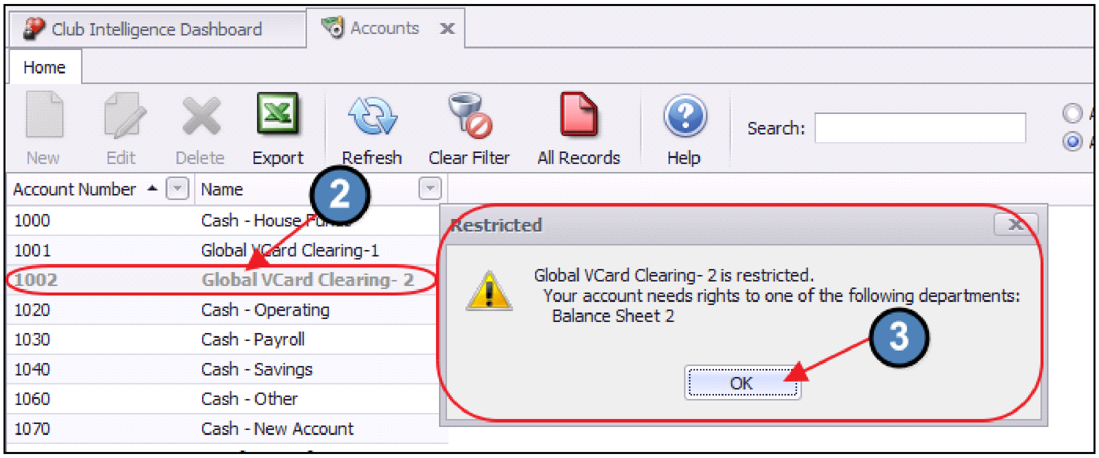
In versions 5.9 and above, an enhancement has been added to help simplify this process. Specifically, employees can now select the **Active** button on a specific module's **Grid** to pull up **All Records**. Any instance of the module an employee does not have rights too, will have a grayed-out italicized font.

### Troubleshooting G/L Account Access (Department Related Permissions)

Within **General Ledger**, **Accounts**, click the **Active** button to view all records.

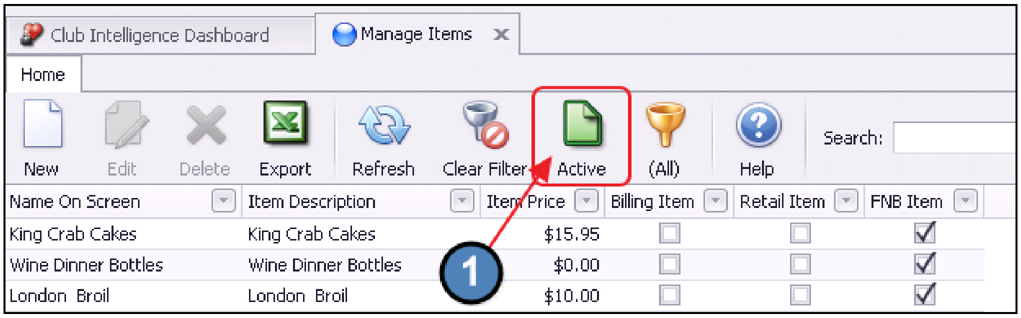



Double-click on grayed-out record to determine permission levels needed to access. Click **OK** to proceed.

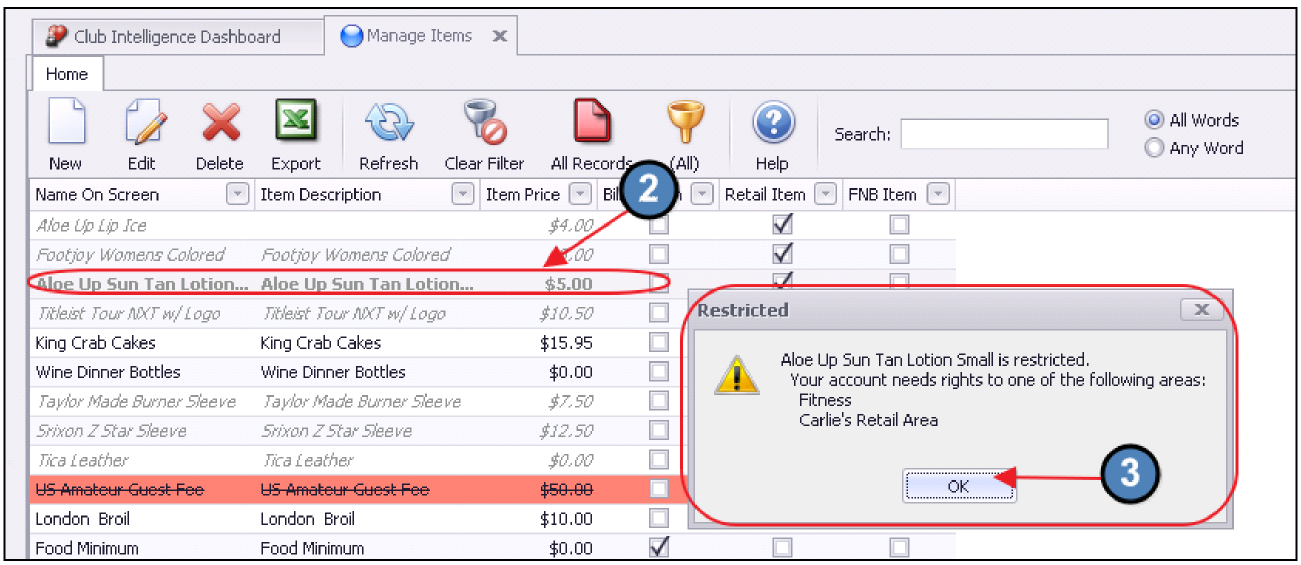


## Troubleshooting Item Access (Area Related Permissions)

Within **Items**, **Manage Items**, click the **Active** button to view all records.




Double-click on grayed-out record to determine permission levels needed to access. Click **OK** to proceed.

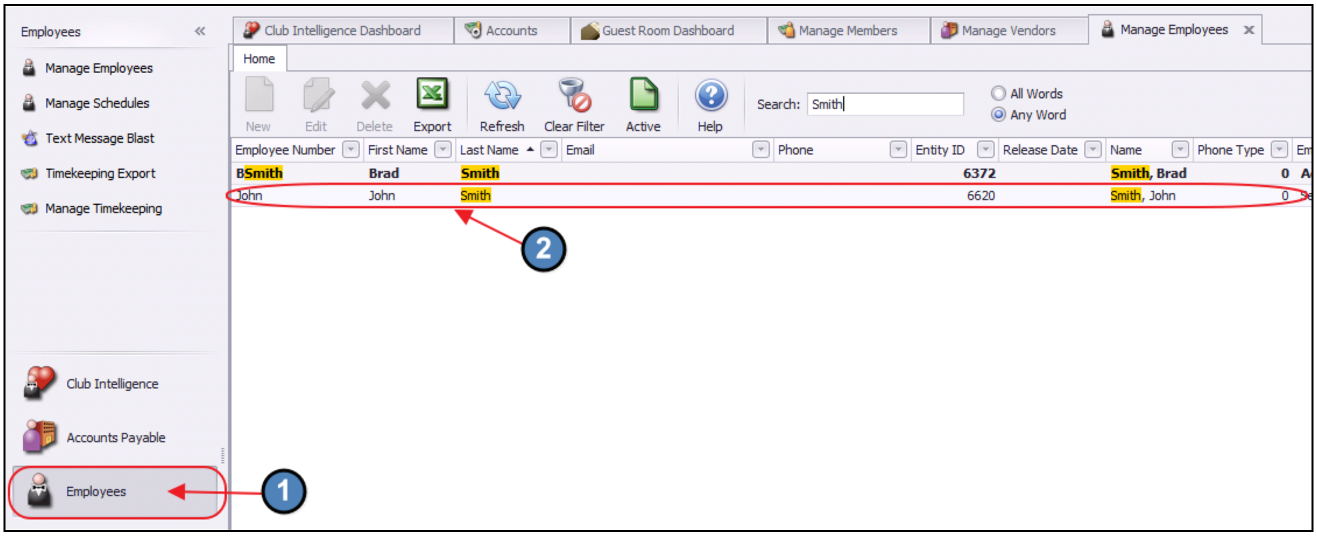



As noted above, the Employee can double-click any record, to receive a prompt telling them what rights they will need to see that specific record.

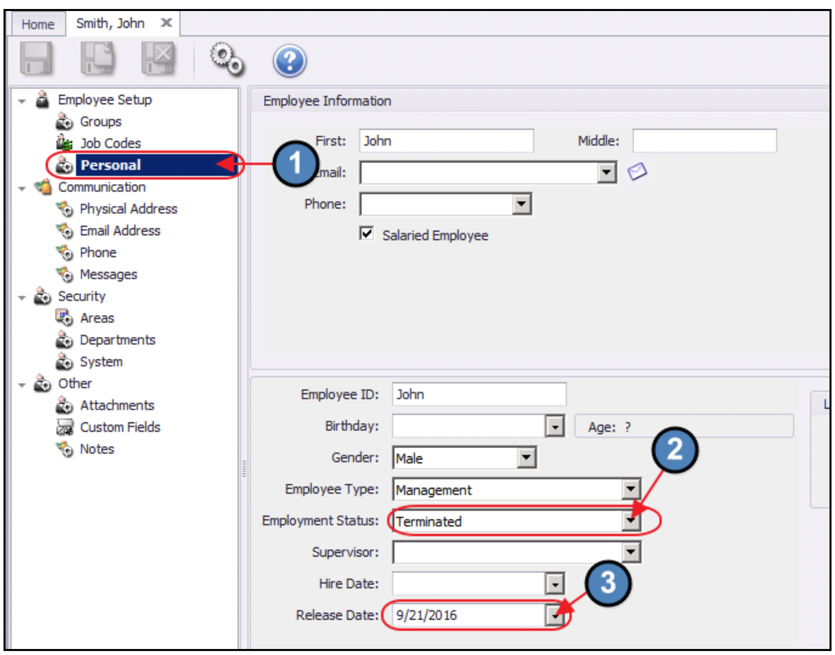
# Terminating an Employee

When an Employee is no longer employed by the Club, ensure the Employee's status is updated, and ensure the Employee can no longer access the system.

1) Launch the Employee's Profile by clicking on **Employees,** and double-clicking on the **Employee**.

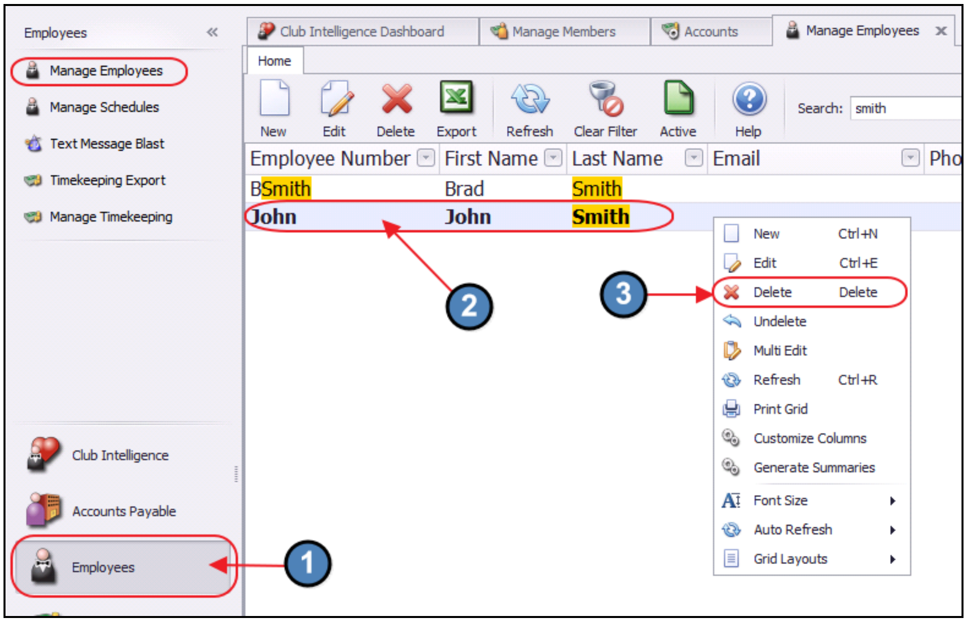



2) Navigate to the **Personal** tab, then:
   a) Set **Employment Status** to **Terminated.**
   b) Set **Release Date** to the date of termination.

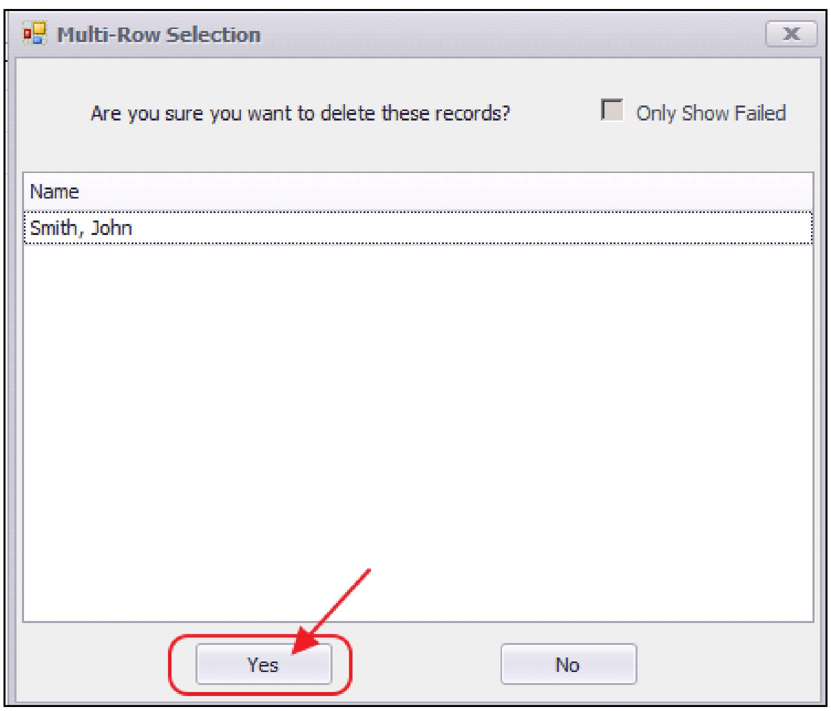



3) When finished, click **Save and Close** to save the settings to the Employee Profile.

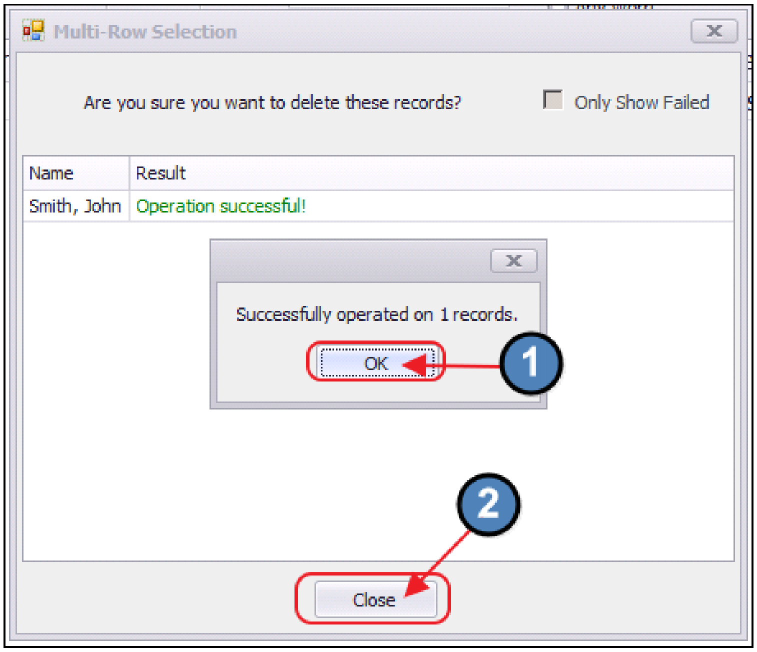
4) Next, navigate to **Employees**, **Manage Employees** grid. Right-click on the employee, and then click **Delete**. This is a best practice to keep the **Employee Grid** clean and up to date with current employment. (**Note:** Deleted records can still be viewed by clicking the **Active** button above the grid).




5) Confirm deletion by clicking **Yes**.

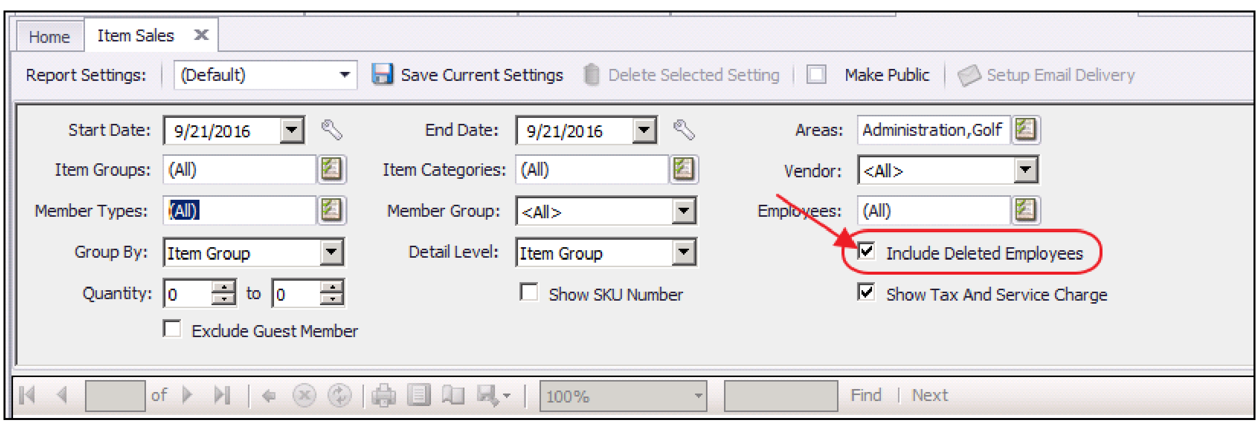


6) Click **OK** to acknowledge deletion success, and then click **Close** to return to grid.




### Reporting Implications

Many of the canned **Item Sales Reports** will have a flag to **Include Deleted Employees** within the report (this flag is checked by default). Verify this parameter is checked to prevent skewed reporting.



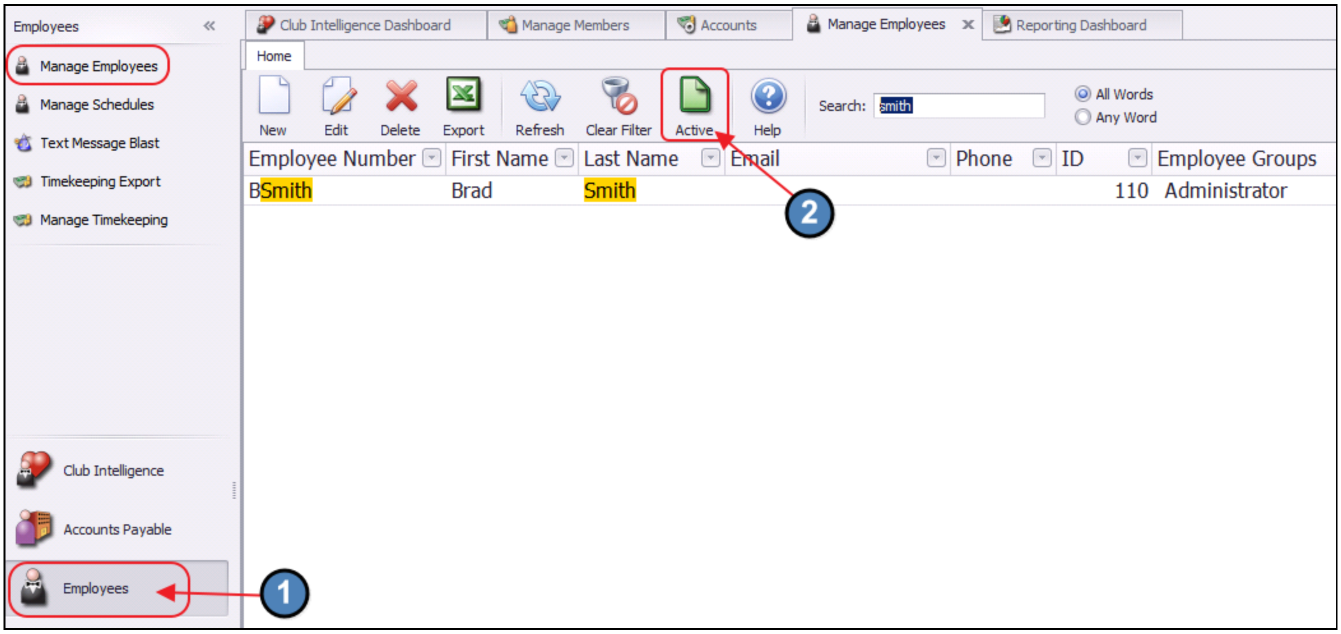

## Rehiring a Former Employee

In cases where a terminated employee returns to the club, the employee's deleted profile can be reactivated, or **undeleted**.

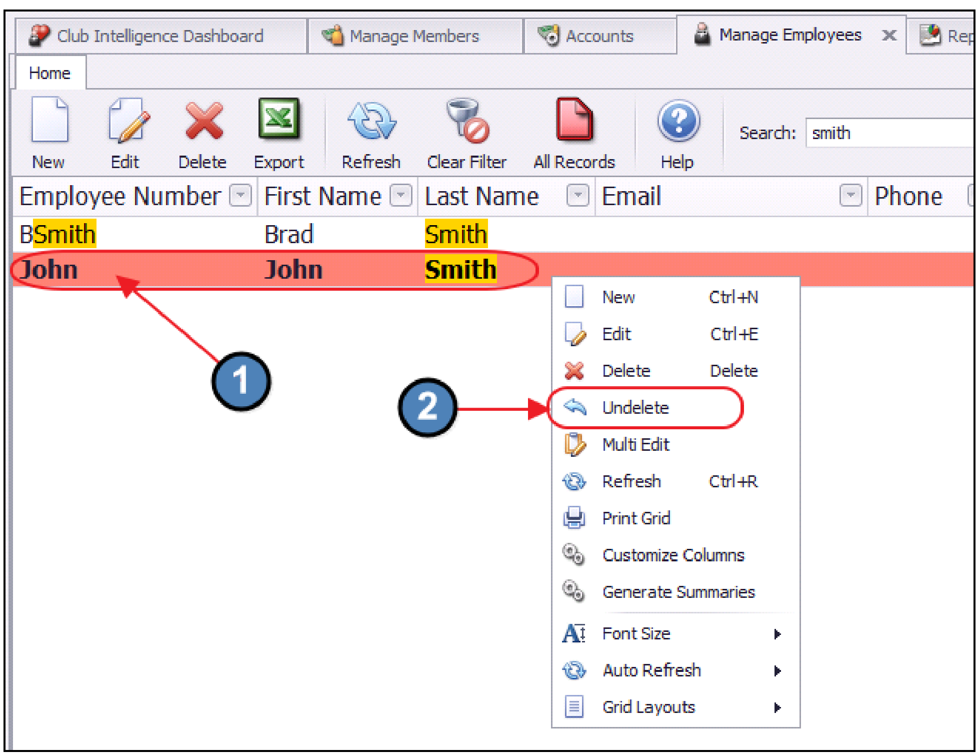
To reactivate an employee:

1) Navigate to the **Manage Employees Grid.**

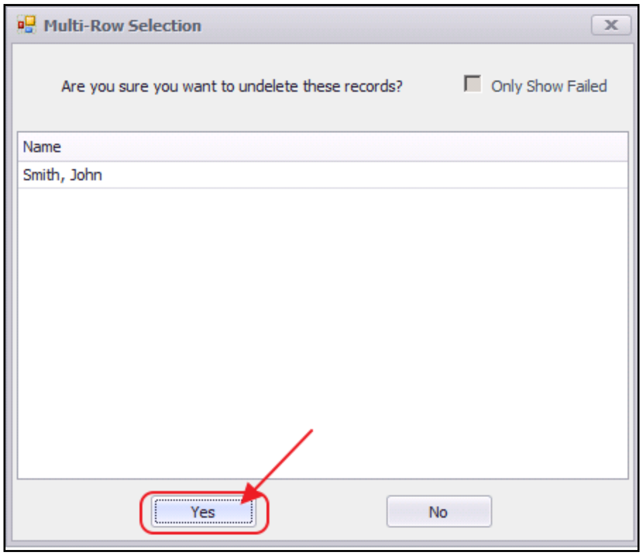
2) Select the **Active** button to pull up **All Records.**



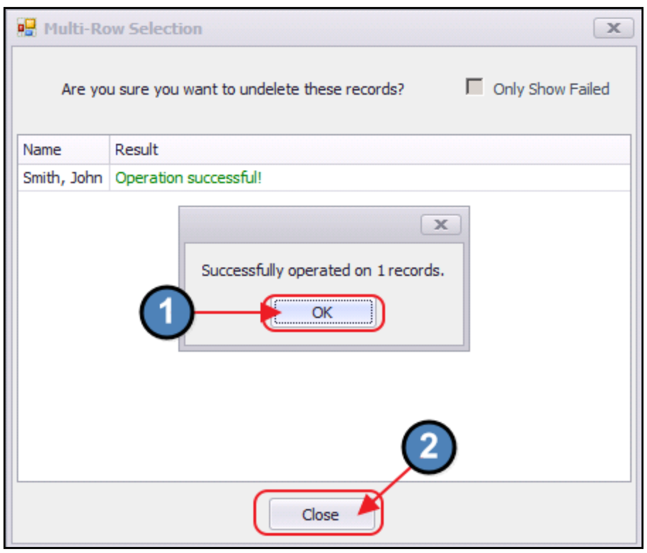

3) Deleted records will be highlighted in red. Right-click on the deleted record, and then choose **Undelete**.



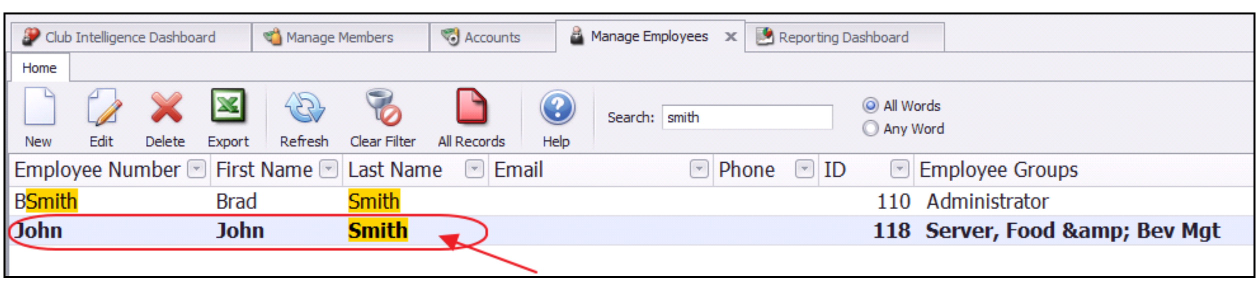
4) Confirm undeletion by clicking **Yes**.




5) Click **OK** to acknowledge undeletion success, and then click **Close** to return to grid.



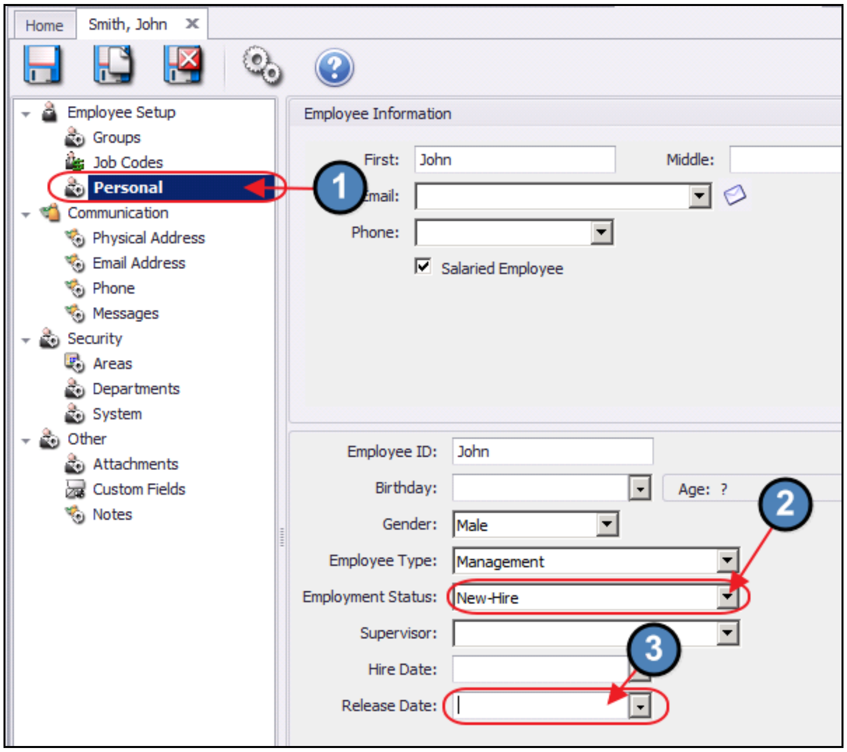

6) Double-click on the newly Activated employee to launch the Employee's Profile.



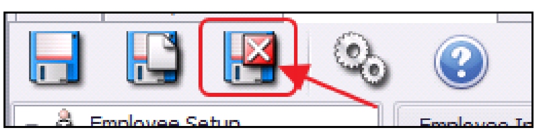
7) Next, navigate to the **Personal** tab, and:

   a) Set **Employee Status** to **New Hire, Re-hire,** or other appropriate status.

   b) Highlight the **Release Date** and select delete on your keyboard to ensure Release Date is blank.




8) Make any other changes to the Employee Profile as required (new address, new employee group, etc). When finished, click **Save and Close** to save the settings to the Employee Profile.



# Best Practices

Assign security by **Employee Groups** rather than at the individual Employee level.

Enter **Rate** and **Expense Payroll Ledger** at the **Job Code** level rather than the Individual level.

When setting up a new employee for an existing Club position, copy an existing employee (with the same role) to expedite setup.

If a new position is created at the Club, first create a new Employee Group, and then use the group to assign security to the new employee.

Adjust Terminated Employee status, and delete them from the Manage Employees grid.  Also, ensure **Account is Locked Out** is checked for all terminated employees to ensure they can no longer access the system.

# Frequently Asked Questions

## What is the best way to create a new employee who will be replacing an existing employee?

If the new employee is performing the same, or similar job functions to an existing employee, the easiest way to create the employee is to open the existing employee, save as new.  See here for more info.

## How do I see deleted Employees in the Employee Grid?

Click the **Active** button above the grid to view all records.  Deleted records will have red highlight around them.