Employee Groups

2016 - Fall Edition

User Guide - Table of Contents

Overview

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. Settings and security are assigned to the Group, and then Employees are added to the Group, to help with consistency of application as well as increased efficiency in Employee maintenance.

Use Case(s)

Next month, a Club will be opening a Spa due to Membership demand. There will be specialized employees working within the Spa, and therefore a new Employee Group called Spa, will need to be established. Security will be assigned to the Group, and all Spa Specialists will become Employees of the Spa Group to ensure security and settings are applied consistently and efficiently.
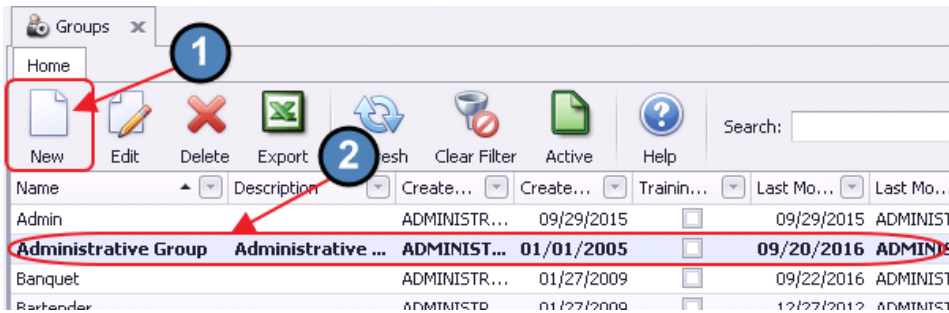
Accessing the Tool

To access **Employee Groups,** select **Employees** across the top toolbar, and choose **Groups**.
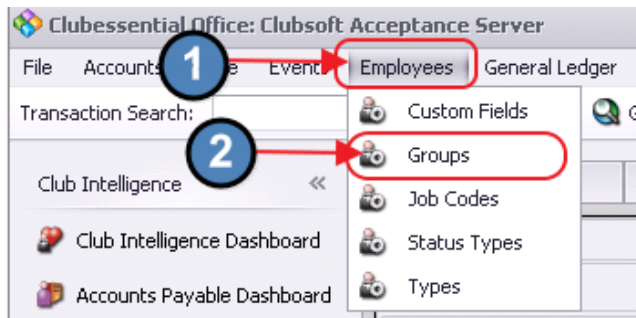
The **Employee Groups Grid** will launch.
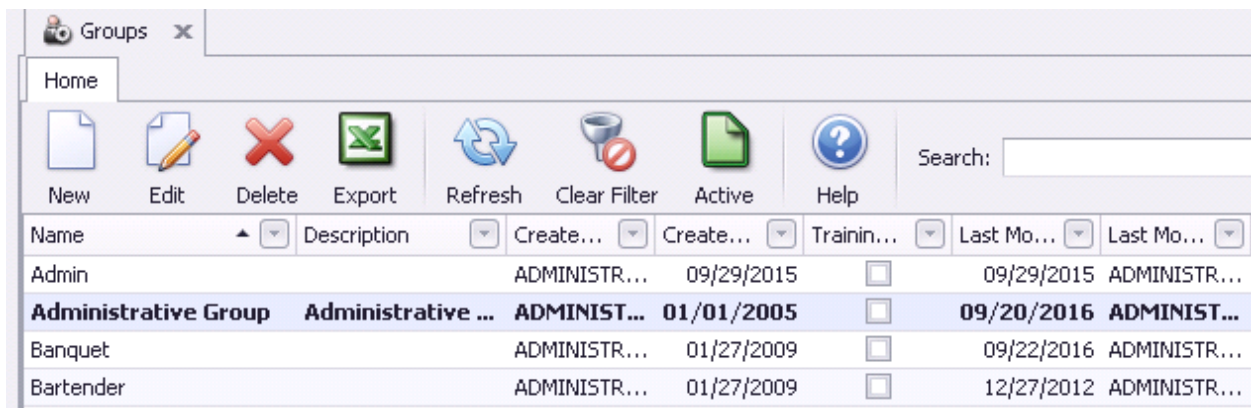
The primary functions associated with managing Employee Groups are embedded in the tabs of the Group setup, which can be accessed by double-clicking on an existing Group, or clicking the **New** button.


Group Setup - Tab Overview

In this section, we will review the various tabs within an Employee Group.

General Information

1) Enter the **Name** and **Description** (optional) of the **Employee Group**.

2) **Display Recipe Button at POS Terminal** - If checked, the employees within the group will be able to view Recipes in the POS system.

3) **Administrative Group** - If checked, employees within this group will have access to all **Roles/ Security** rights.

4) **Training Mode** - If checked, any POS charges completed by an employee within the group, will be put into a **test charge batch**. The system will not allow this batch to be posted to prevent skewed financials.
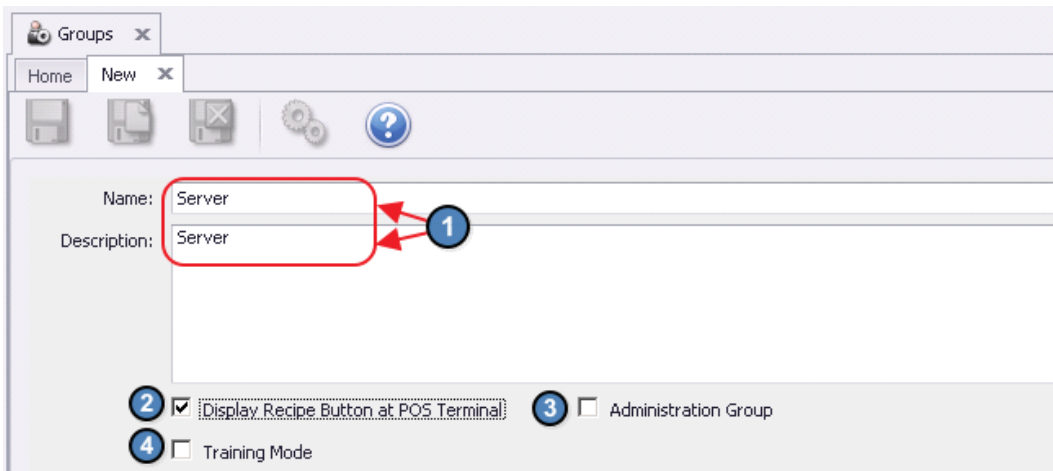
Areas

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

Furthermore, for Employee Groups 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.

Groups will have access to Areas designated in the **Selected** column. Also note, the **Select All,** and **Deselect All** buttons are available to assist with quick assignment and unassignment. For example, if the Group should have access to all areas, click **Select All** to quickly assign access to all areas.
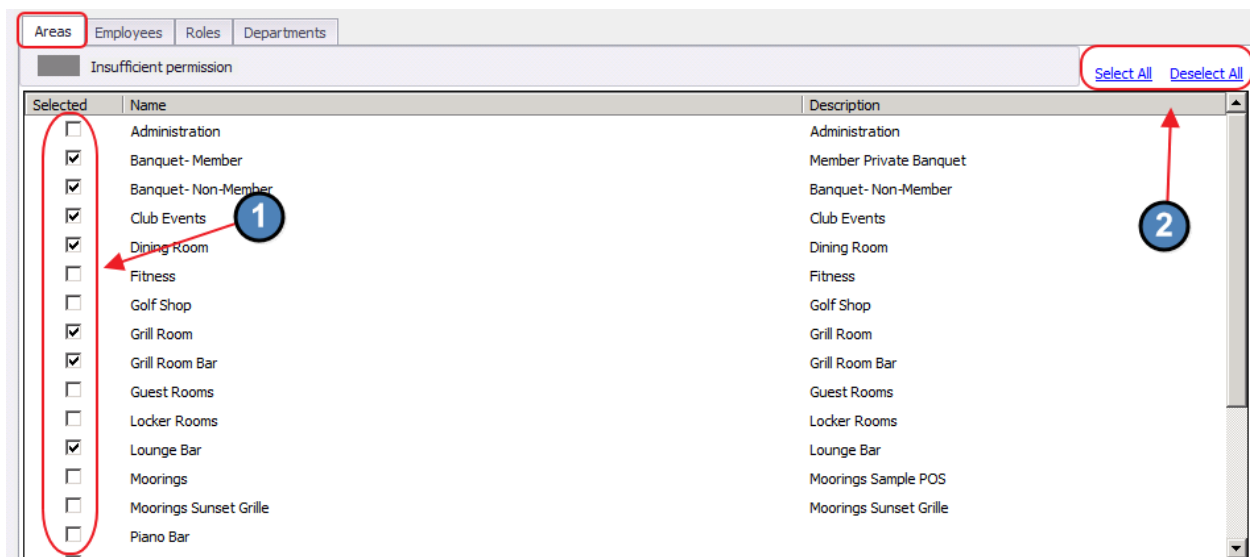
Employees

The **Employees** tab displays the employees within a particular group.

Although it is recommended to add/remove employees within the individual employee profile, this can also be done here by simply checking or unchecking the flag within the **Selected** column. Also note, the **Select All,** and **Deselect All** buttons are available to assist with quick assignment and unassignment.
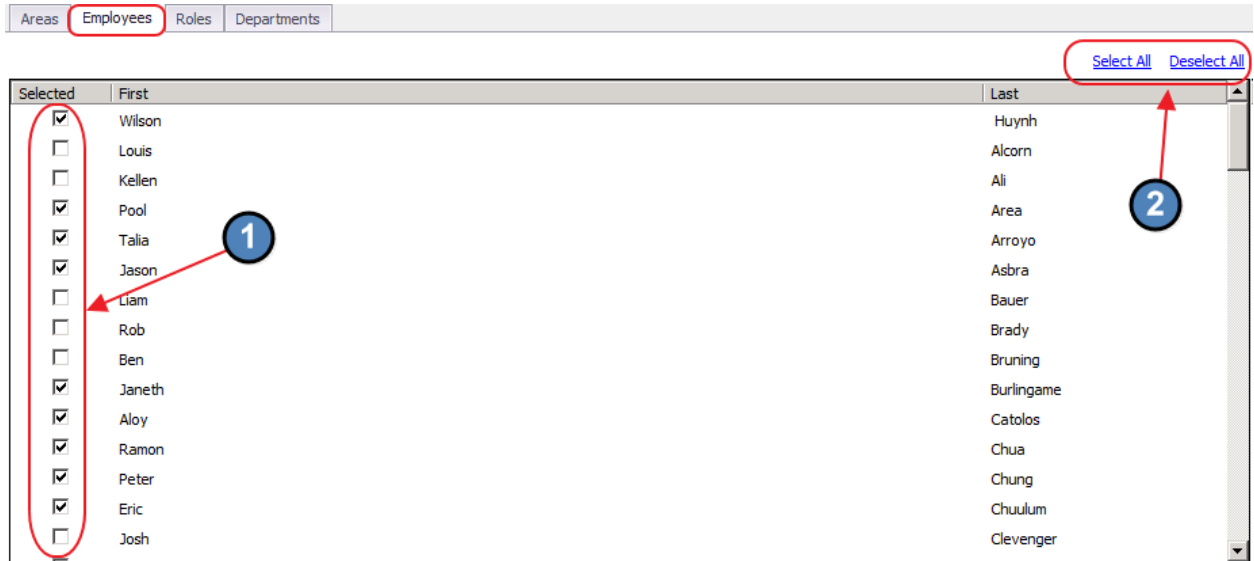
Roles/Security Rights

The **Roles** tab contains the security matrix (roles and modules) as assignable to the Employee.

Note: Please see the **Security Rights Manual** for complete explanation of **Category** and **Security Rights**. Security can be assigned by placing a check in the grid. Additionally, security Categories can be filtered for ease of reference or review. Also note check boxes above the grid can be utilized for easy assignment (check), or un-assignment (uncheck) of entire column.
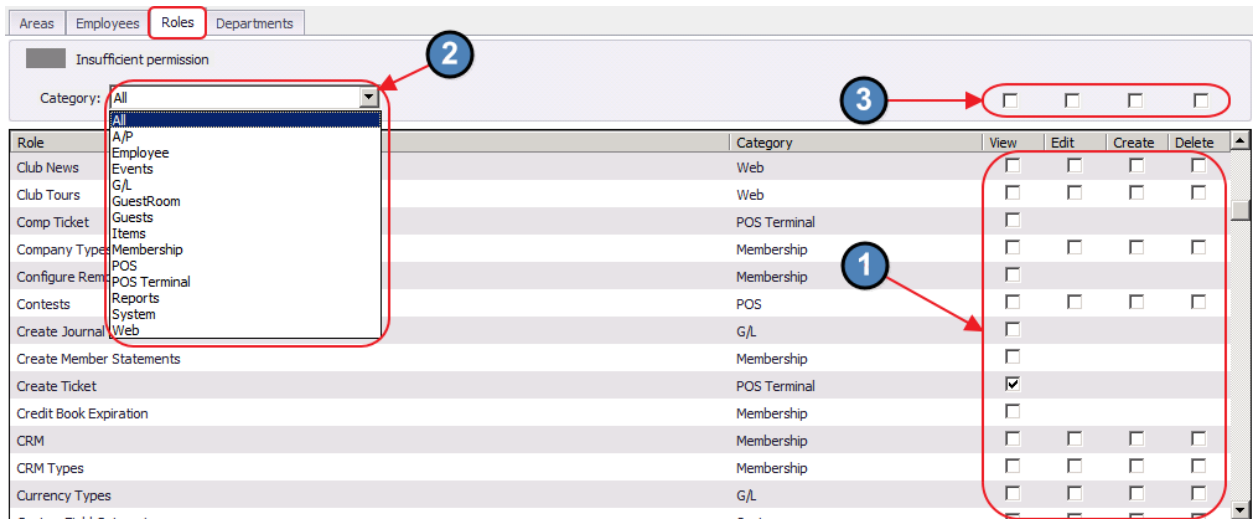
Most security rights, will have four permission levels with a corresponding check box. Check all permission levels that apply for each security feature. The permission levels include:

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.

View	Edit	Create	Delete
☑	☑	☑	☑
☐	☐	☐	☐

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.

| View	Edit	Create	Delete
☑			

Departments

Groups must have rights to at least **one department**. The **Departments** tab is used for department security purposes. More specifically, the **Departments** tab can be used to hide certain aspects of the system from the Group (and respective employees of the Group). 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 Group 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.

Apply departmental permissions by checking the appropriate boxes in the **Selected** column. Note that the **Select All,** and **Deselect All** buttons are also available to use for quick assignment and unassignment. For example, if Employee should have access to all Departments, choose **Select All** to quickly assign.
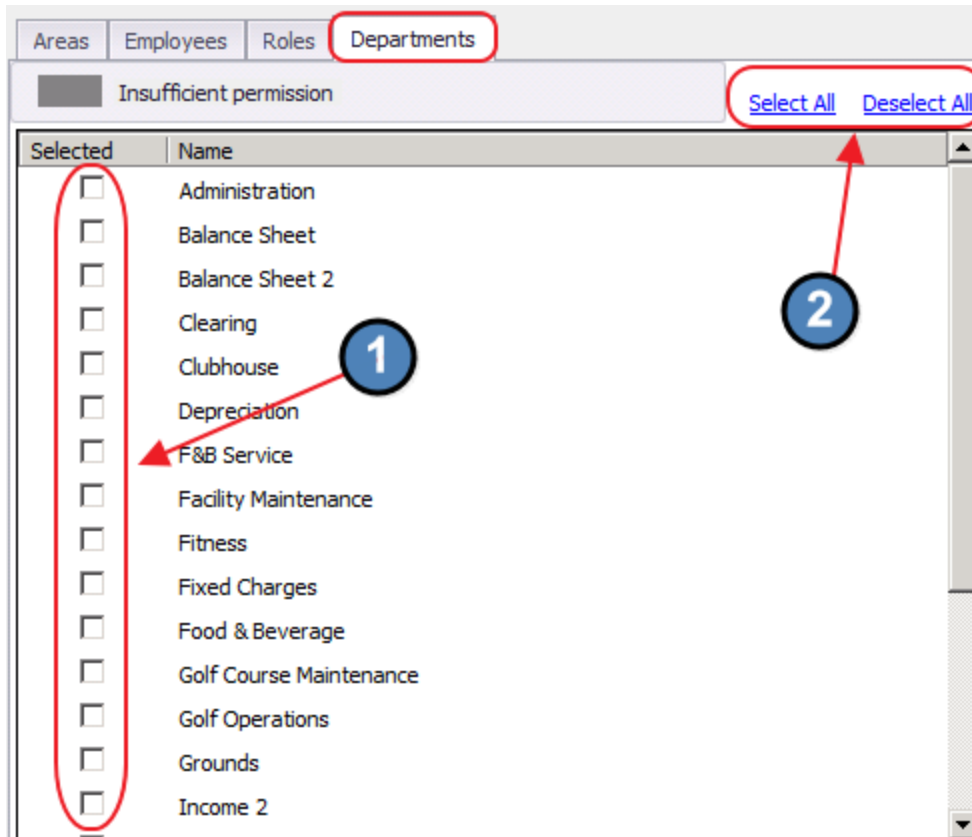
Note: For timekeeping purposes, employees must have rights to the departments linked within the areas they will be working. For instance, if the **Servers** will be working in the Dining Room area, and the Dining Room area is linked to the Food & Beverage department, the **Servers** must have rights to the Food & Beverage department, for timekeeping to report properly. If the employees do not have the correct departmental rights, they will not show on the **Employee Hours** report.

Most Commonly Used Actions - Group Mgmt

Create New Employee Group for an Existing Position

If a new **Employee Group** will perform similar functions as an already existing **Employee Group**, **best practice** is to copy the existing Employee Group's setup.

For instance, let's assume a club is adding a new position titled **Lead Server**, and this position will have a few additional Security rights in addition to their typical **Server** roles. Best practice is to copy the setup of the already existing **Server Employee Group**, and then add the additional security rights to the new group. Not only will this save a great deal of time, but will also ensure that no information is lost in translation from the existing **Server** security rights.

To copy an existing Group,

1) Navigate to the **Employee Groups Grid** and double-click on the **Group** to copy from, to load the existing Group setup screen.
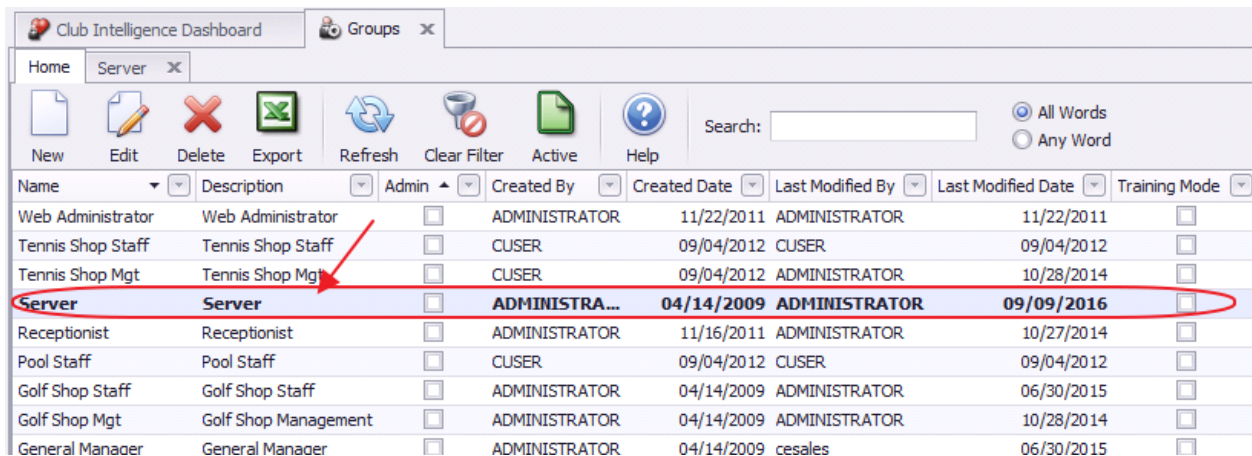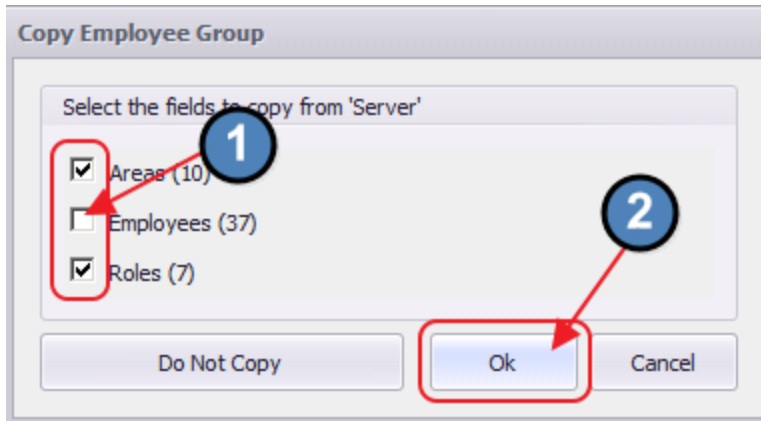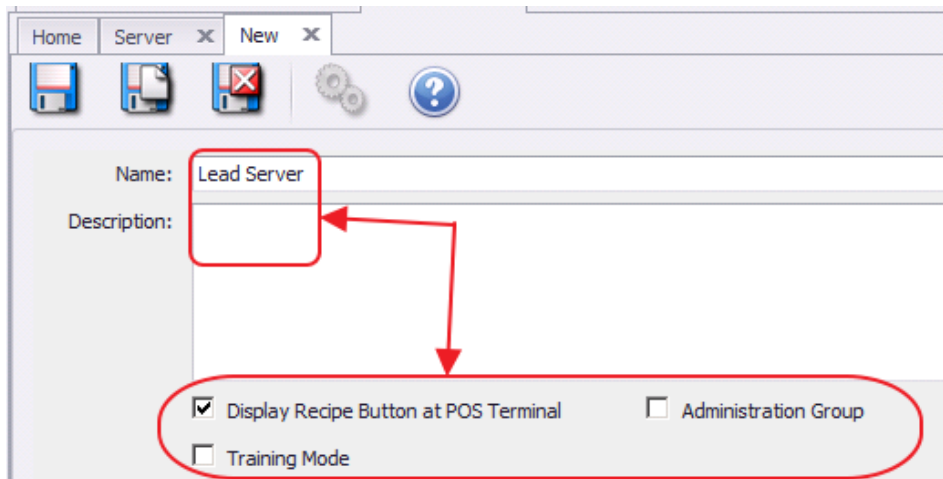

2) Select the **Save & New** icon.
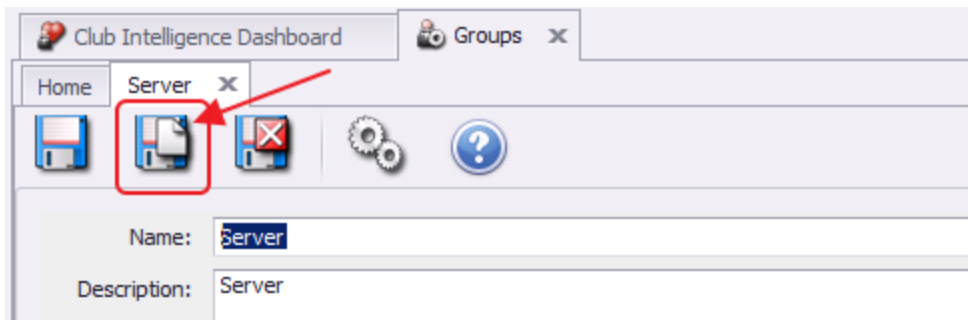
3) The user will be prompted to select the relevant fields to copy. Be sure to **uncheck Employees** to avoid adding unnecessary employees to the group. Then, click **OK**. Applicable fields include:
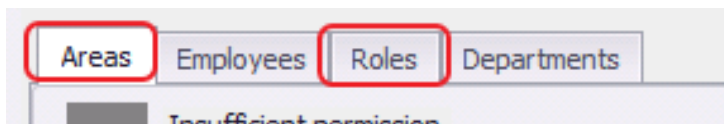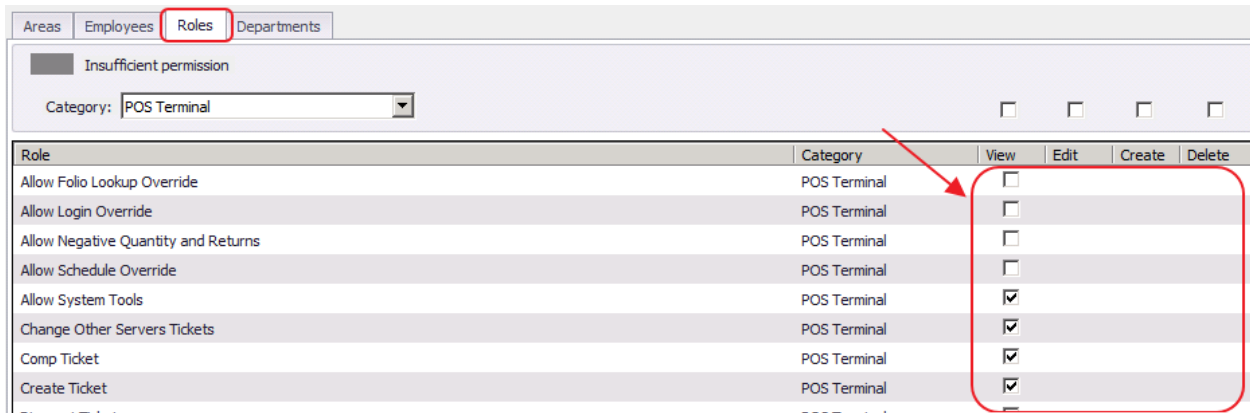
- **Areas**
- **Roles**

4) Enter all **General Information**. Please see the **General Information** section of this document for further instructions.
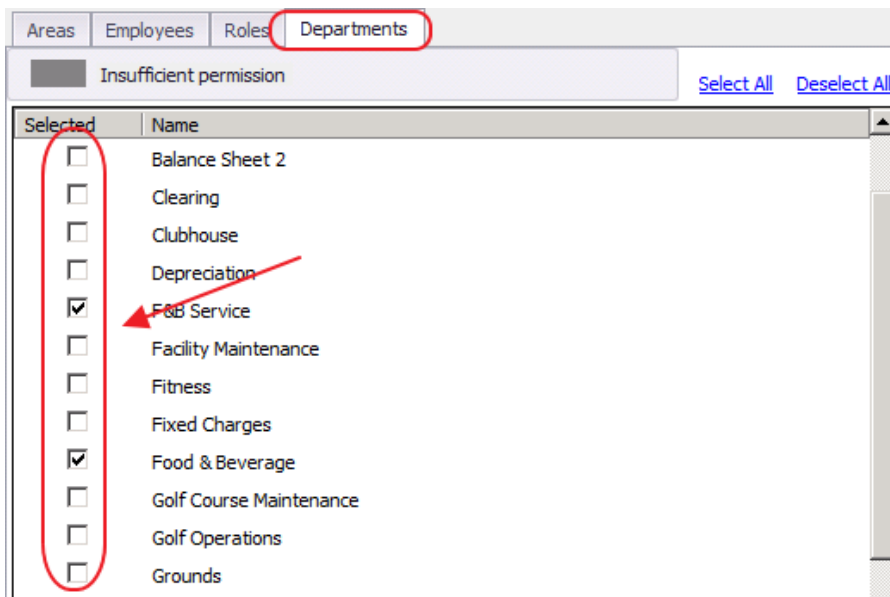

5) Verify that all information was successfully copied to the Areas and Roles tabs.
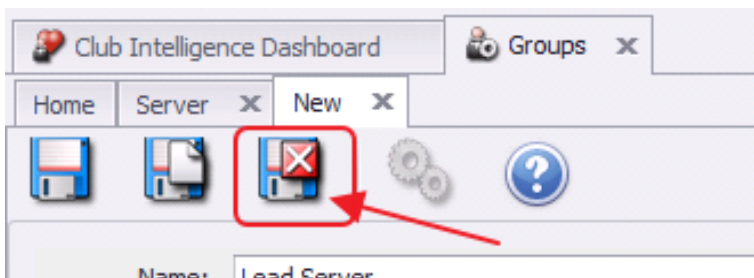
6) Edit **Security** rights on the **Roles** tab as necessary to account for increase/decrease in rights.

7) Navigate to the **Departments** tab and add the necessary departments. Please see the **Departments** section of this document for further instructions.

8) Lastly, click **Save & Close** to complete the setup of the new Employee Group.

Create New Employee Group for a New Position

If an **Employee Group** needs to be created for a completely new position, please follow the below instructions:

1) Navigate to the **Employee Groups Grid**, then perform either of the following to launch the Employee Group setup screen:
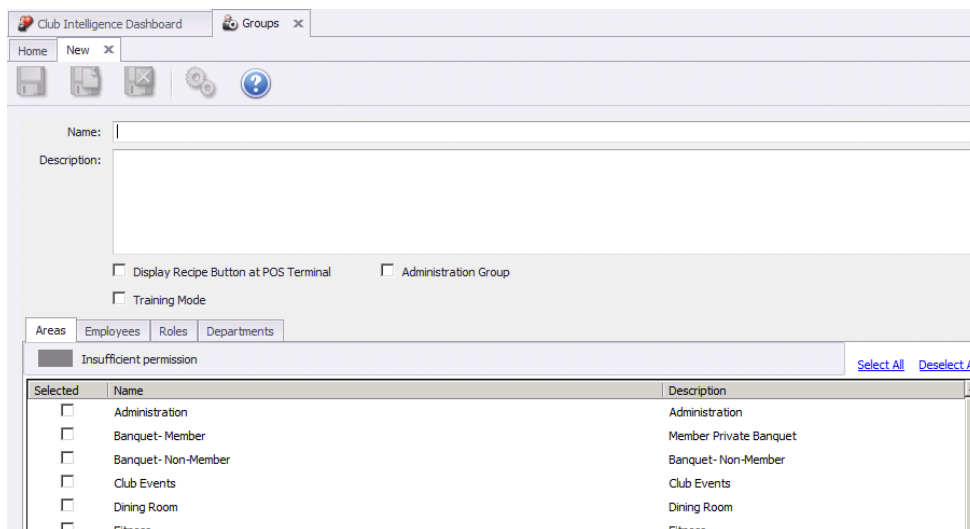
   a) Click the **New** icon on the toolbar.
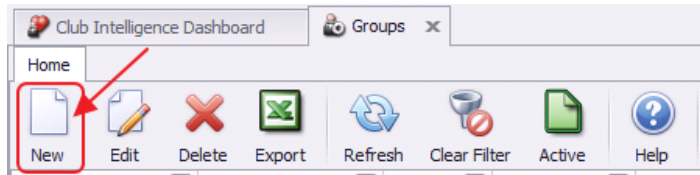
   b) Right-click anywhere on the Employee Groups Grid and select **New**.
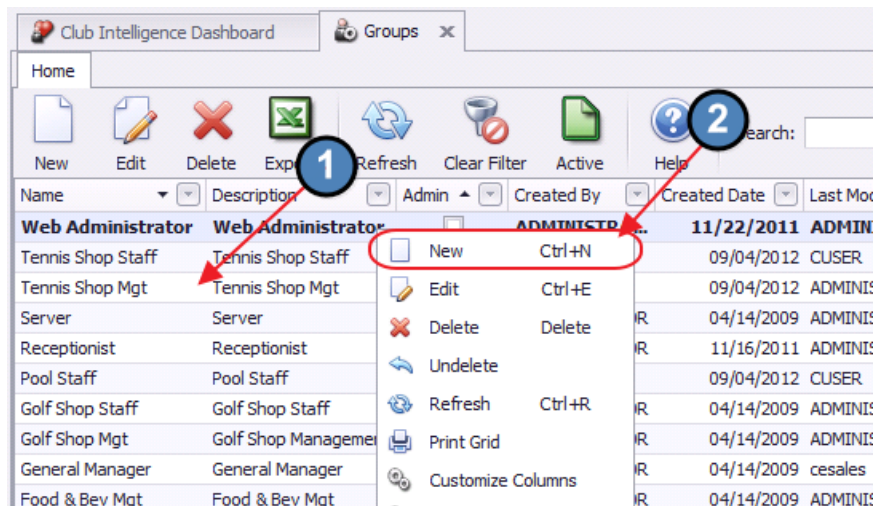
2) The Employee Group setup screen will launch.

3) Complete the **General Information**, and then navigate to each of the below tabs and enter all relevant information. It is recommended to enter information on these tabs in **sequential order**. Please see the **Tab Overview** section of this document for further instructions on each tab.

- **General Information**
- **Areas**
- **Employees**
- **Roles**
- **Departments**

4) Lastly, click **Save & Close** to complete the setup of the new Employee Group.
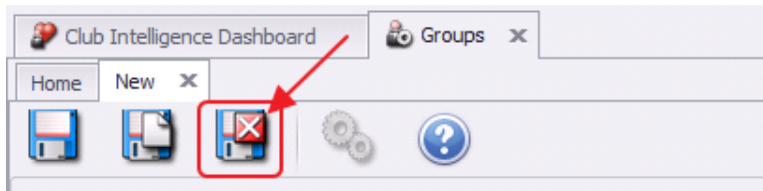
Best Practices

Set security at a Group level (rather than at an Individual Employee level) to increase consistency of security application and efficiency of assignment.

To set up a new Group based on a similar existing group, **make a copy** of an existing group by opening the existing group and utilizing the **Save as New** function. Then, edit as necessary.

Frequently Asked Questions

What is the best way to set up a new Employee with a new position?

First, **set up a new Employee Group** to house the new employee. Assign settings/permissions to the new **Employee Group**, and then **assign the Employee to the Employee Group**, either in the Employee Profile (preferred), or on the Employee tab in the Employee Groups set up.