# **C** Employee Groups

2016 - Fall Edition

### User Guide - Table of Contents

Accessing the Tool

Group Setup - Tab Overview

**General Information** 

<u>Areas</u>

**Employees** 

Roles/ Security Rights

**Departments** 

Most Commonly Used Actions - Group Mgmt

Create New Employee Group for an Existing Position

Create New Employee Group for a New Position

**Best Practices** 

Frequently Asked Questions

## 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.

💩 Grou	ps 🗙							
Home								
		×	×	B	8		•	Search:
New	Edit	Delete	Export	Refresh	Clear Filter	Active	Help	
Name		• 💌 [	Description	🔽 Cr	eate 💌	Create 💌	Trainin	💌 Last Mo 💌 Last Mo 💌
Admin				AD	MINISTR	09/29/2015		09/29/2015 ADMINISTR
Administ	rative G	roup <i>i</i>	Administra	tive Al	MINIST	01/01/2005		09/20/2016 ADMINIST
Banquet				AD	MINISTR	01/27/2009		09/22/2016 ADMINISTR
Bartender				AD	MINISTR	01/27/2009		12/27/2012 ADMINISTR

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.

Croups	×	1							
New	Edit	X	Export	2	h Clear Filte	er Active	() Help	Search:	
Name		• 💌 (	Description		Create 💌	Create	Trainin	💌 Last Mo 💌	Last Mo
Admin					ADMINISTR	09/29/2	015 🗌	09/29/2015	ADMINIST
Administra	ative Gr	oup <i>i</i>	Administra	ative	ADMINIST	01/01/20	)05 🗌	09/20/2016	ADMIND5
Banquet					ADMINISTR	01/27/2	009 🗌	09/22/2016	ADMINIST
Rartandar						01/27/2	nna 🗖	12/27/2012	ADMINIST

# Group Setup - Tab Overview

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

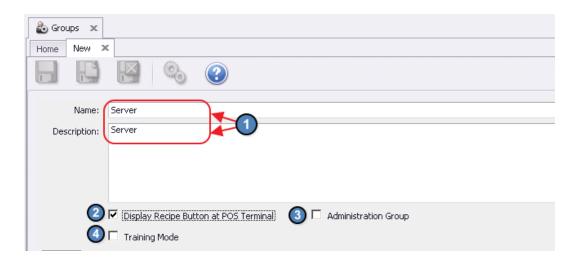
## **General Information**

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.

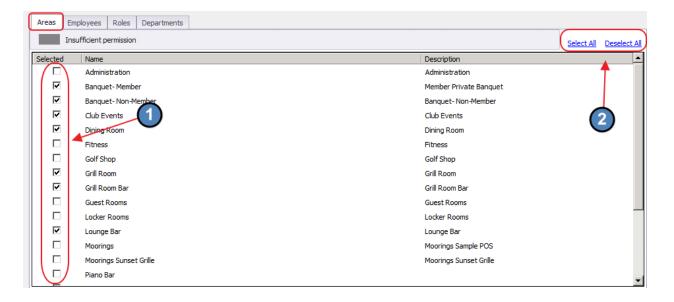


## Areas

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

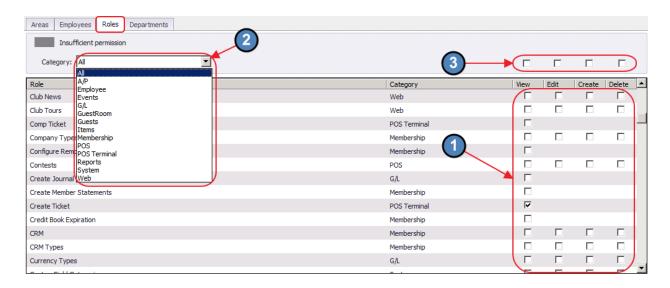
The **Employees** tab displays the employees within a particular group.

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.

Areas E	nployees Roles Departments	
		Select All Deselect Al
Selected	First	Last
	Wilson	Huynh T
	Louis	Alcorn
	Kellen	Ali 🣥
	Pool	Area (2)
	Talia (1)	Arroyo
	Jason	Asbra
	Liam	Bauer
	Rob	Brady
	Ben	Bruning
	Janeth	Burlingame
	Aloy	Catolos
	Ramon	Chua
	Peter	Chung
	Eric	Chuulum
	Josh	Clevenger
$\bigcirc$		

### **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
~	•		•
Г			

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.

Ar	eas	Employees Roles Departments	
	I	nsufficient permission	Select All Deselect All
Se	lected	Name	<b>A</b>
		Administration	
		Balance Sheet	
		Balance Sheet 2	
		Clearing	
		Clubhouse	•
		Depreciation	
		F&B Service	
		Facility Maintenance	
		Fitness	
		Fixed Charges	_
		Food & Beverage	
		Golf Course Maintenance	
		Golf Operations	
		Grounds	
	⊵	Income 2	<b>•</b>

**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.

Club	Intelligen	ce Dashboa	ard	💩 Groups	x							
Home	Server	x										
9		×	×	B	R		1	?			All Words	
New	Edit	Delete	Export	Refresh	Clear Fi			Help	Search:		Any Word	
Name	•	Descr	ription	💌 Adr	nin 🔺 💌	Created By	-	Create	ed Date 💌	Last Modified By 💌	Last Modified Date 💌	Training Mode
Web Admi	inistrator	Web	Administra	tor		ADMINISTR	ATOR		11/22/2011	ADMINISTRATOR	11/22/2011	
Tennis Sh	op Staff	Tenni	is Shop Sta	iff /		CUSER			09/04/2012	CUSER	09/04/2012	
Tennis Sh	op Mgt	Tenni	is Shop Mg			CUSER			09/04/2012	ADMINISTRATOR	10/28/2014	
Server		Serv	/er			ADMINIST	RA	04	4/14/2009	ADMINISTRATOR	09/09/2016	
Reception	iist	Rece	ptionist			ADMINISTR	ATOR		11/16/2011	ADMINISTRATOR	10/27/2014	
Pool Staff	:	Pool S	Staff			CUSER			09/04/2012	CUSER	09/04/2012	
Golf Shop	Staff	Golf 9	Shop Staff			ADMINISTR	ATOR		04/14/2009	ADMINISTRATOR	06/30/2015	
Golf Shop	Mgt	Golf S	Shop Mana	gement		ADMINISTR	ATOR		04/14/2009	ADMINISTRATOR	10/28/2014	
General M	lanager	Gene	ral Manade	er		ADMINISTR	ATOR		04/14/2009	cesales	06/30/2015	

#### 2) Select the Save & New icon.

Club Intelligence	e Dashboard 💩 Groups 🗴
Home Server	K
	😫 💫 📀
Name:	Server
Description:	Server

3) The user will be prompted to select the relevant fields to copy. Be sure to uncheckEmployees to avoid adding unnecessary employees to the group. Then, click OK. Applicable fields include:

- Areas
- Roles

Copy Employee Group	
Select the fields to copy from 'Server'	2
Do Not Copy	Ok Cancel

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

Home Server × New ×	
Name: Lead Server	
Description:	
Display Recipe Button at POS Terminal	Administration Group
Training Mode	

5) Verify that all information was successfully copied to the Areas and Roles tabs.



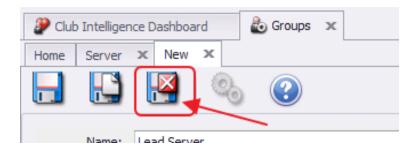
6) Edit **Security** rights on the **Roles** tab as necessary to account for increase/decrease in rights.

Areas Employees Roles Departments					
Insufficient permission					
Category: POS Terminal					
Role	Category	View	Edit	Create	Delete
Allow Folio Lookup Override	POS Terminal				
Allow Login Override	POS Terminal				
Allow Negative Quantity and Returns	POS Terminal				
Allow Schedule Override	POS Terminal				
Allow System Tools	POS Terminal				
Change Other Servers Tickets	POS Terminal	<b>v</b>			
Comp Ticket	POS Terminal	•			
Create Ticket	POS Terminal	<b></b>			
e isti		-			

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

Ar	reas	Employees Roles Departments		
	1	Insufficient permission	Select All	Deselect All
Se	elected	Name		<b>▲</b>
	( 🗆 )	Balance Sheet 2		
		Clearing		
		Clubhouse		
		Depreciation		
		F&B Service		
		Facility Maintenance		
		Fitness		
		Fixed Charges		
	•	Food & Beverage		
		Golf Course Maintenance		
		Golf Operations		
		Grounds		

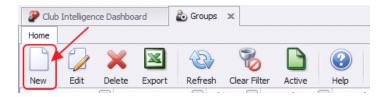
8) Lastly, click **Save & Close** to complete the setup of the new Employee Group.



## 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.

Club Intelligent	ce Dashboard 🕹	Groups	х				
Home							
	× 🖳	B	8		(	2 earch:	
New Edit	Delete Exp	efresh	Clear Filte	r Active	He		
Name 🔹	Description	💌 Ad	min 🔺 💌 🕻	reated By	Cr	eated Date 💌	Last M
Web Administrat	or Web Administrat	0"		DMINISTE	<b>4</b>	11/22/2011	ADMI
Tennis Shop Staff	Tennis Shop Staff	$\square$	New	Ctrl+N		09/04/2012	CUSER
Tennis Shop Mgt	Tennis Shop Mgt		Edit	Ctrl+E		09/04/2012	ADMIN
Server	Server	×	Delete	Delete	R	04/14/2009	ADMIN
Receptionist	Receptionist			are to	R	11/16/2011	ADMIN
Pool Staff	Pool Staff	1	Undelete			09/04/2012	CUSER
Golf Shop Staff	Golf Shop Staff	¢3>	Refresh	Ctrl+R	R	04/14/2009	ADMIN
Golf Shop Mgt	Golf Shop Managemer 🖳		Print Grid		R	04/14/2009	ADMIN
General Manager	General Manager	٩	Customize C	olumns	R	04/14/2009	cesale:
Food & Bev Mgt	Food & Bev Mgt		Customize Columns		R	04/14/2009	ADMIN

2) The Employee Group setup screen will launch.

🔐 Club	o Intellige	nce Dashboard 💩 Groups 🗴			
Home	New 3	x			
	Ę	🛛 🖏 🕑			
	Name:	 			
Des	cription:				
Area	as Emp	Display Recipe Button at POS Terminal     Display Recipe Button at POS Terminal     Training Mode			
	Insu	fficient permission		Select All	Deselect All
Selec	cted	Name	Description		<b></b>
		Administration	Administration		
		Banquet-Member	Member Private Banquet		
		Banquet- Non-Member	Banquet- Non-Member		
		Club Events	Club Events		
		Dining Room	Dining Room		
		Fitness	Fitness		

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.

Club	o Intelligence	e Dashboard	💩 Groups	x
Home	New ×			
		<b>હ</b> ્ય 🖓		

# **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.