Oracle® Hospitality Labor Management

User Guide

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Preface

This document describes how to use Oracle Hospitality Labor Management features and functionality.

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Audience

This document is intended for all Oracle Hospitality Labor Management users.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL: https://support.oracle.com

When contacting Customer Support, please provide the following:

- Product version and program/module name

- Functional and technical description of the problem (include business impact)

- Detailed step-by-step instructions to re-create

- Exact error message received

- Screen shots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at http://docs.oracle.com/en/industries/hospitality/

Revision History

Date	Description of Change
January 2017	Initial publication

1

Overview

This section provides a brief overview of the features and functionality for Labor Management.

Labor Management

Enterprise Time Clock

Forecasting

System-Wide Features

Enterprise Information Portal (EIP)

Remote Transfer Agent

Labor Management

Labor Management is an integrated human resources (HR) application designed to support the recurrent requirements of employee data management. The application operates using the Enterprise Information Portal (EIP) and is an entirely web-based application. Its comprehensive modules help control your restaurants labor costs and maximizes productivity.

Labor Management allows you to maintain human resources employee files, support payroll preprocessing, generate staff scheduling, and has an enterprise time clock. Its key features include:

- Integrated Human Resources

  - Manages centralized employee information, including personal data, I-9 documents, tax filing data for federal, state, and local agencies, and other HR information

  - Facilitates employee reviews and evaluation

  - Maintains schedule availability and reports

- Complete Payroll Preprocessing

  - Allows edits to time cards

  - Supports vacation, sick, and other earnings information

  - Considers minor employee specifications with respect to wages

- HR Interface

– Quickly migrate your existing Human Resources information by downloading the Labor Management HR Template. Enter all existing HR data and import it back into the system in a matter of a few, convenient steps.

Enterprise Time Clock

Use the Enterprise Time Clock to communicate clock in and clock out information directly from the Point-of-Sale (POS) level to the Web Services Application. Located on the POS, time clock information is temporarily cached and, during preset intervals, is uploaded to the Internet. Time clock information is immediately uploaded to the Internet for better, more accurate time keeping functionality. In the event the store-level cache is unavailable, the Enterprise Time Clock opens a channel to Labor Management using an Internet connection and uploads crucial time clock information.

Forecasting

Forecasting is an intelligent business tool that assists you in the critical planning of your staffing, inventory, and production needs. Forecasts are created from many key historical inputs such as gross or net sales, discounts, cover counts, and menu item sales quantities. Forecasting provides high-level visibility throughout the enterprise by displaying rolled-up forecast values to the highest levels within the organization. Likewise, the tool provides ultimate enterprise control through definable rules limiting forecast deviation, Forecast Score Cards, and the approval process, to name a few. Forecasting is specifically designed to catapult your sales by eliminating product waste and streamlining your operational tasks.

The Forecasting application allows you to apply historical data information to forecast future sales for the Scheduling application. You can create, store, display, and edit forecasts as the situation demands. Forecast inputs are derived from POS historical data that is uploaded to the web-based Forecasting application. Forecasting allows you to:

• Maintain historical information based on pre-determined intervals (usually 15 or 30 minutes)

• Apply current week's data and last year's historical data

• Aggregate forecasts for historical types, such as bar sales versus restaurant sales

• Edit incorrect or inexact historical data prior to generating a forecast

• Define historical information about events that affect business trends such as holidays, weather, or cultural and local events

• Edit generated forecasts for a particular day part (for example, brunch or evening), day, or week by adjusting monetary values or percentages

• Review the source data from which the forecast was generated

• Control approval of forecasts by providing security access to the application

System-Wide Features

The following sections describe some standard features and tools that are available or applied throughout Labor Management:

• Enterprise Information Portal (EIP)

- Remote Transfer Agent

Enterprise Information Portal (EIP)

The Enterprise Information Portal (EIP), or Reporting and Analytics web application, is the web-based reporting and data-warehouse solution. It allows an owner or operator to review restaurant information through a browser over the web in near real-time, with restaurants posting sales information every 15 minutes. This functionality has been applied toward the Labor Management application. Labor management information is uploaded to the web in 15 minute intervals, just as information from the web is downloaded to the POS every 15 minutes.

Remote Transfer Agent

The Remote Transfer Agent (RTA), which is sometimes referred to as the .Connect Agent, is the hardware used to transfer information from the POS level to the Reporting and Analytics web application data warehouse and vice versa. The RTA works in typical client-server fashion, providing information through the portal when requested.

You must download and install the RTA. If Labor Management is being added to an existing Reporting and Analytics, Gift and Loyalty, or Inventory Management customer, chances are that the RTA is communicating appropriately and there is no need to re-download the RTA. However, Oracle Hospitality upgrade information and jobs are sent through the RTA periodically and sometimes a new RTA is required for a system to continue running optimally. Oracle Hospitality informs users if and when new RTAs are required.

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Basic Administration

The *Reporting and Analytics Advanced User Guide* is designed to assist and guide system administrators with all common tasks. There are tasks that are specific to Labor Management just as there are tasks that are general to Enterprise Back Office products. It is important that system administrators not only know their area of expertise, but also that they are well versed and fluent in day-to-day administrative tasks.

Common Reporting and Analytics Advanced tasks include creating locations, establishing the reporting hierarchy, creating and modifying users and user roles, and assigning user privileges and reports.

The information in this section is meant purely as an overview, not as step-by-step procedures. See the *Reporting and Analytics Advanced User Guide* for information on setting up and configuring these tasks.

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> Reporting Hierarchies
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> > User roles are categories of users.
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Locations

Any system administrator or an appropriately privileged user can create new locations. However, any locations added after the initial implementation performed by the Oracle Hospitality Implementation Group will be at an additional cost. Therefore, adding a new location in the portal does not mean that a new location begins posting totals.

There are two general steps required to creating new locations:

1. Adding the location.

2. Establishing the organizational hierarchy.

Usually, the Oracle Hospitality Implementation Group has already configured the enterprise with the locations and hierarchy as specified upon initial setup. If necessary, see the *Reporting and Analytics Advanced User Guide* for information on adding new locations.

Reporting Hierarchies

The reporting hierarchy determines how locations are grouped for reporting purposes. A location can exist in more than one reporting hierarchy. This is because different users and user groups can have different reporting needs.

For example, the ACME Corporation has fifteen table service style locations. Within the ACME Corporation there exists an Italian restaurant, a seafood restaurant, and a barbecue restaurant spread out over two states, Kentucky and Tennessee. There are five of each type of concept. That is, 5 Italian, 5 seafood, and 5 barbecue restaurants. Examine the following diagrams to understand how different reporting hierarchies are needed to suit the ACME Corporation's needs:

- By Region or State: This diagram organizes the restaurants by their respective states, Kentucky versus Tennessee.

Figure 2-1   Example Reporting Hierarchy – By Region or State
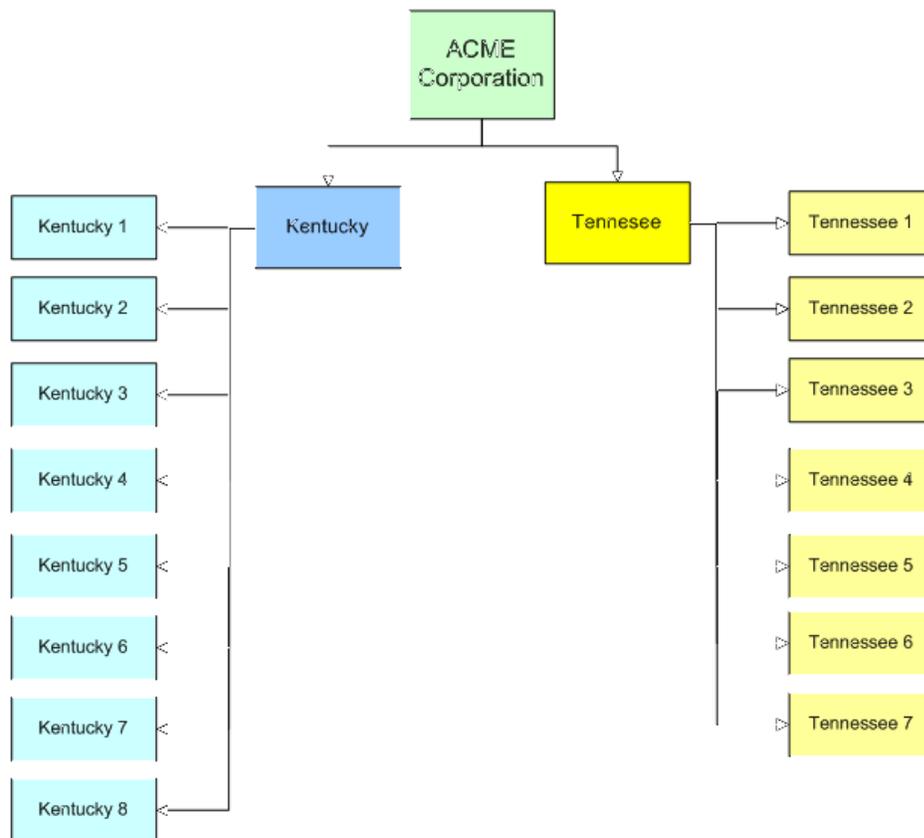
- By Concept or Style: This diagram shows locations sorted by concept, specifically, Italian locations grouped together, seafood locations grouped together, and barbecue grouped together.

Figure 2-2   Example Reporting Hierarchy – By Concept
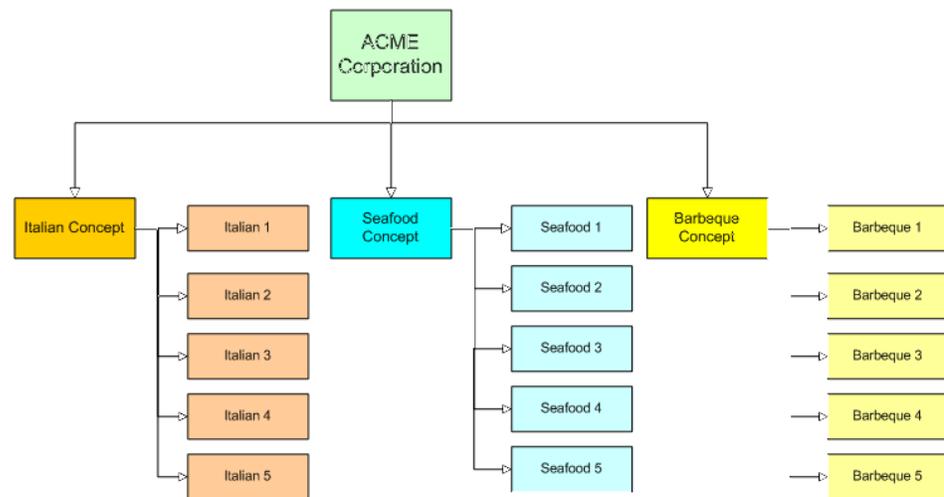
- By Concept and Region: This diagram takes the two previous reporting hierarchies and combines them. This is helpful in determining, for example, if the barbecue locations in Kentucky are more prosperous than the barbecue restaurants in Tennessee.

Figure 2-3   Example Reporting Hierarchy – By Concept and Region
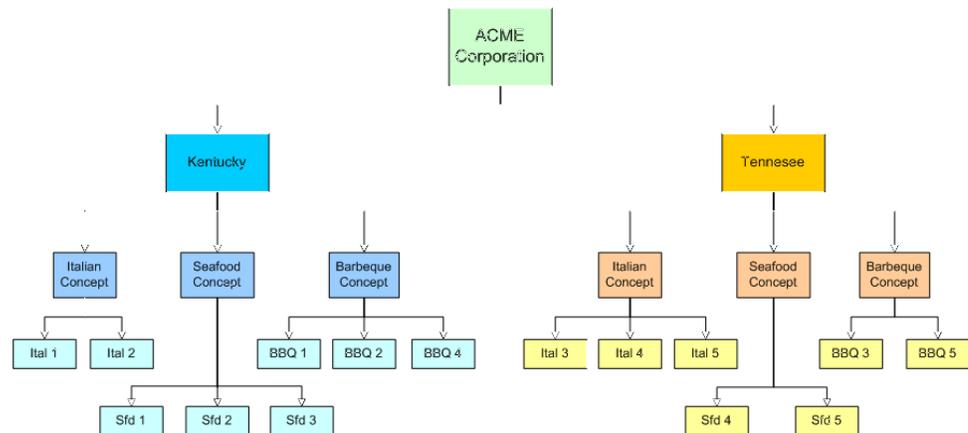
All of the preceding reporting hierarchies show both the various reporting styles, as well as the various levels that can be used. For example, some users can only see the individual location reports, others can only see the Kentucky seafood restaurants, whereas another user can see all the Kentucky locations.

Only system administrators or appropriately privileged users can create reporting hierarchies. There are three general steps you must complete in order to create the most basic of reporting hierarchies:

1.   Establish the hierarchy name. Usually this is the enterprise name.

2.   Create reporting levels. These are the levels that report to the hierarchy in Step 1.

3.   Assign levels or locations. This step specifies which locations are reporting to which levels and which levels are reporting to the hierarchy.

The Oracle Hospitality Implementation Group initially configures the reporting hierarchy to reflect the basic reporting structure. The system administrator or an appropriately privileged user for the organization is responsible for creating additional reporting hierarchies. The *Reporting and Analytics Advanced User Guide* contains detailed instructions on how to create and maintain a reporting hierarchy.

Managing Users

After the organization has been configured and is ready for use, four default user roles are sent to the new Labor Management customer. These user roles are:

- System Administrator (Sys Admin): Enterprise-level user with full portal access. This user typically creates users and sets user privileges.

- Enterprise Manager: Enterprise-level user with portal access limited by the system administrator. That is, the Enterprise Manager is similar to the Sys Admin, but with less privileges.

- Store Manager: Store-level user with access to a limited number of store information.

- Download User: Minimum access account for installing the RTA.

After the Labor Management piece is implemented for an organization, the organization receives the passwords and information about these roles. Oracle Hospitality recommends that you assign these roles to new users as they are created. For example, an organization has Mike, Susan, and Lisa, all of whom have been assigned the role of Store Manager. All three users have different usernames and passwords, but possess the same user rights dictated by the Store Manager user role.

The *Reporting and Analytics Advanced User Guide* contains detailed instructions on how to create users.

User Roles

User roles are categories of users.

User roles are created to manage users. User roles are used as a shortcut for assigning privileges and user rights. Instead of assigning user rights to each individual user, you can create and assign a properly configured user role to new users that are added to the system.

For example, you can create an employee role with limited user privileges such as only being able to see one's own schedule.

The *Reporting and Analytics Advanced User Guide* contains instructions on how to create user roles.

Privileges

Labor Management privileges are administered the exact same way as general privileges. Administration of Labor Management privileges are significant for a number of reasons. For example, Labor Management deals with sensitive information, like Social Security Numbers. You can impose privileges to determine which users can and cannot access sensitive information and other types of data. The following privileges are specific to Labor Management:

- Human Resources: Specifies what rights and abilities are available to users in the Human Resources module.

- Payroll Processing: Specifies what rights and abilities are available to users in the Payroll Preprocessing module.

- Forecasting: Specifies what rights and abilities are available to users in the Forecasting module.

Usually, Portlet Administration is a task carried out by the system administrator; however, any appropriately privileged user can also perform this task. The *Reporting and Analytics Advanced User Guide* contains detailed instructions on how to configure user privileges.

Human Resources Privileges

The following table describes the rights and privileges that dictate what tasks users can perform in the Human Resources module.

Table 2-1   Human Resources Privileges

Right or Privilege	Description
Can Add Employee Records	Select this privilege to allow the user or user role to add employee records.
Can View Employee Records	Select this privilege to allow the user or user role to view employee records.
Can Modify Employee Records	Select this privilege to allow the user or user role to modify employee records.
Can Assign Employee to Another Store	Select this privilege to allow the user or user role to assign an employee at one location to work at an alternate location.
Can Add Pay Rates	Select this privilege to allow the user or user role to add hourly employee pay rates.
Can Modify Pay Rates	Select this privilege to allow the user or user role to modify hourly employee pay rates.
Can View Pay Rates	Select this privilege to allow the user or user role to view hourly employee pay rates.
HR Administrator	Select this privilege to allow the user or user role to perform functions in Human Resources Admin module.
Can View Salaried Pay Rates	Select this privilege to allow the user or user role to view pay rates for salaried employees.

Payroll Preprocessing Privileges

The following table describes the rights and privileges that dictate what tasks users can perform in the Payroll Preprocessing module.

Table 2-2   Payroll Preprocessing Privileges

Right or Privilege	Description
Can View Employee Time Card Records	Select this privilege to allow the user or user role to view employee time card records.
Can Modify Time Card Records for Home Store Employees	Select this privilege to allow the user or user role to modify time card records for home store employees.
Can Modify Time Card Records for non-Home Store Employees	Select this privilege to allow the user or user role to modify time card records for non-home store employees.
Can Add Employee Time Card Records	Select this privilege to allow the user or user role to add employee time card records.
Can Add Employee Other Pay	Select this privilege to allow the user or user role to add other pay to employees.
Can Close Labor Periods	Select this privilege to allow the user or user role to close open labor periods.
Can Reopen Closed Labor Periods	Select this privilege to allow the user or user role to reopen closed labor periods.
PP Administrator	Select this privilege to make the user or user role a Payroll Preprocessing Administrator.

Defining User Privileges

1. In Reporting and Analytics, click **Admin**, and then click **Portal**.

2. On the Portal Administration page, click **Roles**, and then click **Portlets**.

3. Select the appropriate user role, and then click **Configure**.

4. Select the appropriate portlet:

   a. If you want to configure user privileges for the Human Resources module, select **Human Resources**.

   b. If you want to configure user privileges for the Payroll Preprocessing module, select **Payroll Preprocessing**.

5. Click **Edit**, select the appropriate privileges, and then click **Save**.

   For descriptions of the privileges, see the following sections:

   - Human Resource Privileges

   - Payroll Preprocessing Privileges

3

Human Resources Administration

In the Human Resources Administration module, you can configure the rules that govern the employment of individuals. From labor laws to store hours, this module is your human resources one-stop-shop.

These settings are generally considered one-time configurations and are usually established by the system administrator. As the rules that govern employees change, the system administrator reserves the right to modify and tweak existing rules as needed. It is generally recommended that these configurations be the responsibility of an experienced user or users.

Employees are restricted and managed by the following group of rules and settings:

- Organization Configuration

- Template Setup

- Template Assignment

- Reason Codes

- Employee Change Tracking

- Skill Levels

- Job Definitions

- Child Labor Laws

- Wage and Tip Laws

- Employee Availability

- Store Work Hours

- School Districts

- Payroll Bank

- Job Category Master

- Labor Category Master

> Organization Configurations
>
> Configuring an Organization
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> Templates
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> Downloading and Uploading a Template
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> Reason Codes and Types

Organization Configurations

In Organization Configuration, you:

- Determine how the organization behaves with respect to information transferred from the Point-of-Sale (POS) and to the POS

- Specify how employee information is interpreted and the rules that govern whether or not an employee is accepted within the organization as a whole

The following table describes the fields and options in the Organization Configuration module.

Table 3-1   Organization Configuration Field Descriptions

Field	Description
Transmit to POS	Select this option to transfer the social security number entered through web services down to the POS level.
PC Application Password Prefix Exclusion	Enter a value in this field to prohibit users with that prefix from logging in to the web services application.
PC Application Password Must be Numeric	Select this option to make users enter a purely numeric password for the PC Application Password.
Administer POS Password Centrally	Select this option to enforce POS Password administration from a central location.
Validate Payroll ID Before Uploading Employee	Select this option to enforce the application to validate an employee's payroll identification number before any employee information is uploaded from the POS.
Allow User Defined Payroll ID	Select this option to enforce user defined payroll ID uniqueness by organization or organization level.

Table 3-1   (Cont.) Organization Configuration Field Descriptions

Field	Description
Hire Date Maximum Number of Days in Past	Enter the number of days in the past an employee may be hired.
	For example, if an individual was hired on a date that falls one day after the end of a pay week, you can set the hire date to a day before to include the new employee in the pay cycle.
Hire Date Maximum Number of Days in Future	Enter the number of days in the future an employee may be hired.
	For example, if an individual was hired on one day but cannot start working on that day, you can set the hire date to a day in the future so that the employee's status is recorded.

Configuring an Organization

1. In Reporting and Analytics, click **Labor Management** and then click **Human Resources**.

2. In Human Resources Administration, click **Admin** and then click **Organization Configuration**.

3. Update the fields as needed, and then click **Save**.

   For descriptions of each field, see Organization Configuration.

Templates

You create and assign templates within the Human Resources Administration module that determine what fields are visible, greyed out, or read-only. Template Setup works in conjunction with Template Assignment. You can be download and modify a template or raw XML data and then uploaded it back into the application. Then, you use the Template Assignment module to assign a template to a user role. For example, you may have a different template for each store, or you may have a template specifically for system administrators and a different template for store managers.

Figure 3-1   Template Assignment
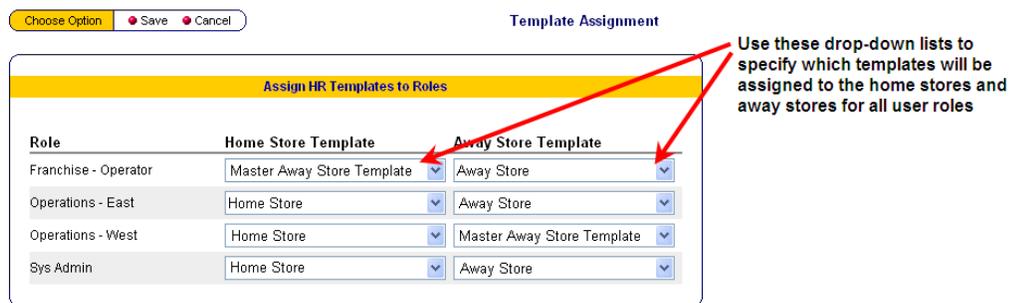
You must assign a template or it will produce an error when a user attempts to view the portal. This is because the system cannot determine what type of information that user or user role is supposed to see.

Downloading and Uploading a Template

1. To download a template:

   a. Click **Browse** and navigate to the location on your computer where you have saved the template, and then select the template.

   b. Click **Upload Template**.

2. To upload a template:

   a. Click **Download Template**.

   b. Click **Save** and select where you want to save the template.

   c. Open the template, modify as needed, and save it.

Reason Codes and Types

Reasons are sets of predetermined descriptors. You can use reason codes within different areas of Labor Management:

- In Payroll Administration, reason codes explain time card adjustments, availability requests, and so on.

- In Human Resource, reason codes explain termination and leave of absence.

For example, when an employee has to make a time card adjustment. the employee would select from a list of reasons such as Late, Early, On Paid Break, Forgot to Clock-In/Out, and so on.

Reason codes are generated at the Labor Management web-based level and then transferred down to the POS for employee to make a selection. Whatever the employee selects is uploaded to the system and recorded on the employee's time card.

Reason Code Types, which are hard coded into the system, categorize Reason Codes. The following table describes the Reason Code Types:

Table 3-2   Reason Code Types

Reason Code Type	Description
Time Card Adjustments	A list of reasons why a time card was adjusted. For example, the employee is late from break or left early due to illness. These justifications help explain why the system administrator or store manager had to enter an employee's time card record and update it manually.

Table 3-2   (Cont.) Reason Code Types

Reason Code Type	Description
Employee Termination	A list of reasons why an employee was terminated. Showing a reason or explanation as to why an employee no longer works at a location provides the employer with a documented explanation of the termination.
	For example, a restaurant has six locations in one county. The North County location hired Ted who shows up for his first week of shifts. Ted decides to No Call No Show for three shifts, resulting in immediate termination. Ted, who does not want to buy a new uniform to a different restaurant, drives across town to another location. When Kristin, the hiring manager, pulls up Ted's records, she sees the reason code and makes an informed decision on whether or not to hire Ted.
	Reason codes can be positive or negative. For example, you can have reason codes such as Going Back to College or Moved Out of the Area. In this example, if an employee goes to college in another state but would like continue working for the same restaurant in the new locale, the hiring manager at the new locale can make an informed decision by seeing the Going Back to College as the reason code in the termination record.
Leave Of Absence (LOA) And Days Allowed	A list of reasons why an employee's status changed to inactive. When defining reasons to use with leaves of absences, you must also indicate the maximum time an employee can be given based on the law or company policies. For example, in the case of bereavement leave you would enter 5 days if your company policy is to grant 5 days of bereavement leave. Keep in mind that state laws take precedence over company policy. If a national chain has a maximum of 3 days for bereavement leave, but the restaurant is located in a state where the state law requires a minimum of 5 days, then the company must defer to the state law.
Availability Request	A list of reasons for employees to use in the provide their work availability, check their schedules, request time off, and exchange shifts with other employees. Employers can set up reasons for employees to classify time off requests such as Out of Town, Sick, and so on. When employees are unavailable, the data is available in the Scheduling Application.

Creating a Time Card Adjustment Reason Code

Table 3-2   (Cont.) Reason Code Types

Reason Code Type	Description
Pay Rate Change	A list of reasons indicating why an employee's pay rate was changed. For example, if an employee is not scheduled to work on a particular day but comes in to work, the manager may have agreed to pay extra dollar per hour for the employee to work on a day off. This reason is can track, justify, and help explain why an employee's pay rate was manually changed.
Forecasting	A list of reasons used by the Forecasting Application which is used to generate forecasts for scheduling, staffing, sales, and so on based on the data provided to the system.
Other Pay Type	A list of reasons explaining why an employee is receiving a pay that is not the employee's typical or usual wage rate. Other Pay is added directly to employees using Payroll Preprocessing.

Creating a Time Card Adjustment Reason Code

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin** , and then click **Reason Codes**.

3. Select **Time Card Adjustments**, and then click **Select**.

4. Click **Add** and enter a **Reason Code**. For example, Clocked in Early.

5. To set the reason code as the default for time card adjustments, select **Default**.

6. Click **Save**.

Creating an Employee Termination Reason Code

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin** , and then click **Reason Codes**.

3. Select **Employee Termination**, and then click **Select**.

4. Click **Add**, enter a **Reason Code** for terminating employees, and then click **Save**.

Creating a LOA and Days Allowed Reason Code

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

Human Resources Administration **3-7**

2. In Human Resources Administration, click **Admin** , and then click **Reason Codes**.

3. Select **Leave of Absence**, and then click **Select**.

4. Click **Add**, enter the **Reason Name**, and enter the maximum number of days an employee can take leave from work for the reason you entered in the **Maximum Days** field.

5. Click **Save**.

Creating Availability Request Reason Codes

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin** , and then click **Reason Codes**.

3. Select **Availability Request**, and then click **Select**.

4. Click **Add**, enter a **Reason Code**, and then click **Save**.

Creating a Pay Rate Change Reason Code

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin** , and then click **Reason Codes**.

3. Select **Pay Rate Change**, and then click **Select**.

4. Click **Add**, enter a **Reason Code**, and then click **Save**.

Creating a Forecasting Reason Category and Reason Code

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin**, and then click **Reason Codes**.

3. Select **Forecasting**, and then click **Select**.

4. To create a Forecasting Reason Category:

   a. Click the **Reason Categories** tab, and then click **Add**.

   b. Enter a name for the **Reason Category**, and then click **Save**

5. To create a Forecasting Reason Code:

   a. Click the **Reason Codes** tab, and then click **Add**.

   b. Enter a **Reason Code**, (optional) select a **Reason Category**, and then click **Save**.

Employee Change Tracking

You can use Employee Change Tracking to monitor changes made to employee records. When a user modifies employee information, the system generates a record

and uses it to populate the Employee Change Tracking Report. This report details the change itself, the date of the change, and the individual who made the change.

For example, Chrissy Smith has recently married and decided to take her husband's last name. Chrissy's manager accesses the record, but accidentally updates Christy Smith's last name. If changes to the last name are being monitored, then the Employee Change Tracking Report shows the update to Christy Smith's record rather than Chrissy Smith's record. Another example of when this feature may be useful is if a disgruntled manager accesses the system with the intent of destroying human resources information such as social security numbers or banking information. If these fields are being monitored, a record of the change is preserved and you can revert the data back to its accurate state.

In Employee Change Tracking, you are required to select a table or category and the field from that table that you want to monitor. Table or category options include:

- Job Rate

- Employee

- POS Configuration

Employee Change Tracking Records

There are three states for Employee Change Tracking records:

1. Active

2. Deleted

3. Inactive

If an Employee Change Tracking record is tracking modifications, then it is considered active. If an Employee Change Tracking record has never collected information, nor posted that information to the database, you can delete that Employee Change Tracking record. However, once an Employee Change Tracking record posts any type of information to the database, you can only set the record to inactive.

# Viewing, Editing, and Deleting Employee Change Tracking Records

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin**, and then click **Employee Change Tracking**.

On the Employee Change Tracking page, you can view the following details:

Table 3-3   Employee Change Tracking Page

Column	Description
Change Code	Shows the code or common description of the component being monitored.
Table	Shows the name of the table or category of fields being monitored. Options include **Job Rates**, **Employee**, or **POS Configuration**.

Table 3-3   (Cont.) Employee Change Tracking Page

Column	Description
Field Name	Shows the field name or the component being monitored. Options are dependent on the table or category that you choose.
Inactive Date	Shows the date an Employee Change Tracking record was made inactive, if applicable.

3. If you want to view inactive records, click **Toggle Display Inactive Records**.

4. If you want to edit the name of a Employee Change Tracking record, select the record, and then click **Edit**.

5. If you want to delete an Employee Change Tracking record, select the record, and then click **Delete**.

   You can only delete Employee Change Tracking records that have never collected nor posted information to the database.

Skill Levels

Skill levels rate how well an employee performs at a job. Employee advancement is often based on attainment of a particular job skill level. Skill levels are assigned to employees during Employee Configuration to rate an employee's proficiency at a particular job.

For example, skill levels can be Trainee, Novice, Proficient, or Expert. Within those categories you can have sub-categories from 10-1, 10 being the least proficient and 1 being an expert. Therefore, it is possible to have a Level 1 Novice whose next promotion would be a Level 10 Proficient.

Defining Restaurant Skill Levels

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin**, and then click **Skill Level**.

3. Click **Add**, and then enter a **Name** for the skill level.

4. Enter a number between 1 to 10 for the **Skill Level**, and then enter the value by which the skill level is rated in the **Skill Level Value** field.

5. Click **Save**.

Modifying an Employee's Skill Level

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Employee**.

3. Search for and select the employee, and then click **Edit**.

4. Click the **Location Configuration** tab, and then click the **Job Rates** secondary tab.

5. Select a **Job Code Name**, select the new **Skill Level** for that job code, and then click **Save**.

Job Definitions

Jobs are defined in Employee Administration and then assigned to employees in Employee Configuration. Each employee is assigned one or more jobs and has one primary job per location.

A job is an accounting entity that enables the system to track the labor activity of a group of employees by their work category. Jobs are used for:

• Linking hourly employees to a specific wage rate when clocked in

• Grouping labor hours and costs into job categories for reports on labor cost analysis

When creating job definitions, you must specify the revenue center. Otherwise, when Labor Management data syncs to the Point-of-Sale (POS) database, totals post to the wrong revenue center.

Job Types

Hourly jobs are paid by the hour, typically at the prevailing minimum wage or above. Salaried jobs provide employees with pay that does not fluctuate regardless of how many hours the employee works.

For example, a dishwasher earning $9.50 an hour and working 35 hours a week makes $332.50; whereas, a manager who makes a salary of $29,000 per year makes $557.69 a week, regardless of whether the manager works 10 hours or 50 hours.

Pay Rates

Pay rates allow you to configure the appropriate wage for a job. For example, the minimum wage for a hostess might be $5.75 an hour in the state of Maryland. A location chooses to set the default pay rate at $7.50 an hour, which means that starting hostesses always make $1.75 more than the Maryland minimum wage.

Assign to Locations

After you create jobs, you must assign them to locations. Since not every location has the same needs, you do not need to assign all the jobs to all the locations. Although, you can assign job rates on a total organizational level.

For example, a small chain of restaurants offering alcoholic beverages is unable to acquire a liquor license at one of their locations, so the owners decide to install a coffee bar instead. The organization can choose to not have the jobs bartender, bar back, and cocktail waitress assigned to the location without the liquor license and can create a substitute job such as barista or coffee bar server. Since none of the other restaurants have a coffee bar, it is unlikely that the other locations would need to assign the job role of barista. Therefore, the job role of barista only exists at the one location.

You can also configure jobs by location, which means you do not need to apply default specifications. For example, two locations have the job of line cook. At one location, the age requirement for a line cook is 16 years and the pay rate is $6.00 an hour. At another location, the age requirement for a line cook is 18 years and the pay rate is

$6.50 an hour. Both of these locations use the same enterprise-wide job definition, line cook, but configure it differently at their respective locations.

When assigning certain jobs to locations, you can assign special pay rates for hourly employees. For example, if baristas do not require the same amount of experience as that of a well-trained bartender, the owner can decide that baristas should only make $7 an hour as opposed to the liquor bartenders who make $9 an hour.

Creating a Job Definition

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin**, and then click **Job Definitions**.

3. Click **Add**, and on the General tab, update the following fields:

   • **Job Name**: Enter a name to identify the job. For example, Salaried Manager, Bartender, Hostess, or Line Cook.

   • **Job Category**: Select a job category for the job.

     This field provides a means for grouping several jobs together for reporting purposes. For example, dishwashers, chefs and cooks can be grouped together in a job category called Kitchen Staff. Job Categories are uploaded from the POS.

   • **Labor Category**: Select a labor category for the job.

     This field provides a means for reporting the hours worked at the job. For example, Tipped Employees, Non-Tipped Employees.

   • (Optional) **Overriding Employee Class**: Select the employee class whose privileges will override an employee's normal class when working the job. Options for this field are uploaded from Reporting and Analytics.

     For example, Maggie, the assistant manager is off on Monday evenings. Chris, the head waiter, works as the assistant manager on those nights. Chris is a member of the Waiters employee class, which allows a limited set of privileges. On Monday evenings though, Chris clocks in and selects the Assistant Manager job. When he does, that job overrides his employee class and links him to the employee class Managers. As long as he is clocked in as assistant manager, Chris is able to use the privileges of the manager employee class.

   • (Optional) **Revenue Center**: Select the revenue center in which the job is effective.

   • (Optional) **Clock-In Privilege**: Select the privilege that an employee must have in order to clock-in for this position.

     Clock-in privileges are assigned to employee classes in the Employee page in the POS Configuration section on the Location Configuration tab.

   • (Optional) **Minimum Age**: Enter the minimum age requirement for the job.

     Entering an age restriction prevents the job from being assigned to employees who are not old enough to perform those tasks.

   • (Optional) **Declare direct tips on clock out**: Select this option if the job requires employees to declare direct tips (tips received from guests) when clocking out.

- (Optional) **Declare indirect tips on clock out**: Select this option if the job requires employees to declare indirect tips (tips received from other employees.) when clocking out.

- (Optional) **Allow early or late clock out**: Select this option to allow employees working this job to clock out early or late, even when their employee class is not privileged to do so.

- (Optional) **Print tips declared on clock out**: Select this option to cause tips declared chit to print when an employee working this job clocks out.

  The chit shows the total amount of tips declared by the employee for that shift.

- (Optional) **Subject to Tipped Credit**: Select this option if employees in this job receives direct or indirect tips.

  This option defines tipped jobs for calculating the tip credit.

4. Click the **Type** tab.

5. If employees are paid an hourly wage for the job, select **Hourly** and enter the hourly rates:

   - **Default Regular Rate**: Enter the normal starting wage for the job. This can be overridden by the override regular rate. Pay rate changes apply to future time clock entries. Current and past time clock entries remain at the rates that were in effect when they occurred.

   - (Optional) **Minimum Regular Rate**: Enter the minimum wage for the job. This is the lowest starting pay for this position.

   - (Optional) **Maximum Overtime Rate**: Enter the maximum overtime wage for the job. This is the highest overtime pay for this position.

   - (Optional) **Maximum Regular Rate**: Enter the maximum wage for the job. This is the highest non-overtime pay for this position.

6. If employees are paid a fixed amount for the job, select **Salaried**.

7. (Optional) Select one or more **Overtime Levels** for the job.

   A location can have up to four overtime levels. The labels change as overtime levels are defined. For example, if you create an overtime level 1 called Time and a Half, the label next to the field shows as Time and a Half l instead of Overtime Level 1.

8. In the **Effective From** date editor, select the date from which the job is active.

9. Click **Save**.

Assigning a Job Definition to a Location

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin**, and then click **Job Definitions**.

3. Search for and select the job definition that you want to assign to a location, and then click **Assign to Locations**.

4. From the Location Selection pane, select the locations where you want to assign the job.

5. In the **Effective From** date editor, select the date from which the job becomes active for the locations.

6. (Optional) If you want to override the default enterprise settings, specify the minimum age, pay rates, and over time levels.

7. Click **Save**.

Child Labor Laws

On the Child Labor Law page, you can add a child labor law by clicking **Add** from the top menu bar. The page you are directed to has three tabs:

1. General

2. Overtime

3. Work Restrictions

On these tabs, you can set up multiple age ranges (for example, 14-15, 16-17) using the minimum and maximum age fields to parallel the laws of your state. These tabs also allow you to:

• Define the maximum consecutive days that a minor is allowed to work

• Assign overtime work

• Exclude minors from working on Sundays

• Require a work permit or an age certificate

Work Permits and Age Certificates

Some jurisdictions require a work permit, an age certificate, or both for each minor that is employed. Although work permits and age certificates vary from jurisdiction to jurisdiction, generally they are issued by a representative of the local government, such as a school official, high school guidance counselor, and so on. These permits and certificates validate the minor's age and delineate the scope of duties that the employee can and cannot perform. Age requirements can also differ between jurisdictions. For example, some stores require any employee under the age of 18 to possess a work permit or age certificate, while others require permits or certificates for only 16 and under.

Since work permits and age certificates apply only toward some employees, configuring the work permit requirement occurs on the General tab of the Child Labor Law page. If the **Work Permit Reqd** or **Age Certificate Reqd** options are selected, users must enter the work permit or age certificate number and expiration date in Employee Administration for any employee whose birth date falls within the age range.

Overtime Rules

Overtime rules define when and how much overtime pay an employee receives. For example, state labor law may require that employees be paid time-and-a-half for working over 40 hours a week.

Overtime rules are defined on the Payroll Administration page, and then assigned to child labor laws on the Child Labor Law page.

Defining a Child Labor Law

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin**, and then **Could Labor Law**.

3. Click **Add**, and then on the General tab:

   a. Enter a **Name** for the child labor law.

   b. Enter the **Minimum Age** at which a minor employee can work and the **Maximum Age** at which the minor employee no longer needs any type of work permission.

   c. (Optional) Enter the maximum number of consecutive days that minor employees can work in the **Maximum Consecutive Days** field.

   d. If minor employees require an age certificate, select **Age Certificate Reqd**.

   e. If minor employees require a work permit, select **Work Permit Reqd**.

   f. If minor employees are not permitted to work on Sundays, select **Sunday Exclusion**.

   g. In the **Effective From** date editor, select from which date the law is active.

   h. (Optional) In the **Effective To** date editor, select when the law becomes inactive.

4. Click the **Overtime Rules** tab, and select the overtime rules that apply to the labor law.

5. (Optional) On the Work Restrictions tab:

   a. Select the earliest time and the latest time minor employees can arrive for a shift and depart from a shift respectively on school days and non-school.

   b. Select the **Maximum Hours Per Day**, **Maximum Hours Per Week**, and the **Maximum Days Per Week** minor employees can work on school days and non-school days.

6. Click **Save**.

Wage and Tip Laws

Wage and Tip Laws define the parameters that reflect the requirements pertaining to minimum wages and tip credits. Use the Wage and Tip Law options to ensure compliance with federal and state laws when hiring, scheduling, and calculating employee pay.

Note: Child labor laws are configured in a separate module in Labor Management. Child labor laws are labor laws in the general sense of the term; however, they have been broken down to ensure that proper attention is given to them. Overtime pay rules are defined on the Payroll Administration page of Labor Management.

Minimum Wage

The prevailing state or federal minimum wage law that favors the employee becomes the basis for wages throughout Labor Management. When the minimum wage is changed, all wages that fall below the new minimum wage are updated. This applies to the job rate and employee override functionality.

Tip Credit

Tip credit is a percentage or monetary amount set by federal or state law that can be deducted from the minimum wage of employees who receive tips. The law that favors the employee is honored.

For example, in one state, the allowed tip credit is 50 percent or $3.09. This means that an employer can pay an employee $3.08 an hour rather than the $6.15 minimum wage as long as the employee receives enough tips during a payroll period to earn the minimum wage for each hour worked. If the employee's combined earnings (that is, wage, as adjusted by the tip credit, plus tips) average out to below the minimum wage, then the employer must make up the difference. You can run the Tip Exception Report to see a list of employees whose wages and declared tips are less than the minimum wage.

Since tip credits are determined on a state-by-state basis, it is necessary to refer to the relevant state documentation on this issue or you can refer to the Department of Labor Website information regarding tip credits at www.dol.gov.

Setting Minimum Wage and Tip Credit

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin**, and then click **Wage and Tip Law**.

3. Click **Add**, enter a **Name** for the new law.

4. Enter the **Minimum Wage** requirement for the wage or tip law.

5. (Optional) Enter the **Maximum Tip Credit Amount** or the **Maximum Tip Credit Percentage**.

6. In the **Effective From** date editor, select from which date the law is active.

7. Click **Save**.

Employee Availability

Human Resources provides an area in which to configure employee availability. Availability works hand-in-hand with the Scheduling application for the generation of schedules. When accurate employee availability exists, the Scheduling application is

able to take the data in the system and create a comprehensive schedule at the click of a button. Availability is based on both the employee's provided availability, as well as the organization's work hours and work rules applicable to that location.

Availability is classified by one of three categories or Time Segments as labeled in the user interface (UI):

1. Preferred Time: The times or shifts the employee has requested to work.

2. Unavailable Time: The times or shifts the employee has designated as unable to work.

3. On Call Time: The times or shifts the employee does not typically work, but is available for scheduling if needed.

For employees who have regimented schedules for various reasons such as to avoid coinciding with child care or other jobs, the Employee Availability feature helps to alleviate the stress surrounding schedules. Employee Availability, which has traditionally been provided to scheduling managers on scraps of paper, is a potentially error filled job. Since Labor Management is able to save availability, creating a schedule is simpler, quicker, and less stressful.

You do not need to configure availability times for every minute of every day. If availability details are not entered for an employee, that employee is neither considered available nor unavailable for certain shifts and is scheduled randomly.

Availability Time Segments for Preferred Time and On Call Time must not overlap Unavailable Time. If an overlapping time is entered into the system, an error message appears and the data is not saved. For example, an employee cannot have a Preferred Time set as Monday 4:00 p.m. until 9:59 p.m. and an Unavailable Time configured as Monday 12:00 p.m. until 4:59 p.m.

Configuring Employee Availability

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Employee Availability**.

3. Search for and select the employee that you want to configure, and then click **Edit**.

4. If the employee needs to work more hours or less hours than the default values configured for the location, in the Employee Work Rules section, enter the **Minimum Hours** and **Maximum Hours** the employee must work for the entire week and for each day of the week.

    Work rules, which are configured in Payroll Preprocessing, creates guidelines for the number of hours that an employee can work per day and per week. On the Employee Availability page, these values are meant solely as a guideline. If an employee needs to work more hours or less hours per day or week, you can make those updates on this page and save for that individual employee.

5. In the Employee Availability section, click **Add**, and then select the employee's availability:

    • **Time Segment**: Select the category of employee availability. Preferred Time, Unavailable Time, or On Call Time.

    • **All Day Event**: Select this option if the time segment lasts the entire day.

- **Start of Week**: Select the start day for the employee's time segment.

- **Start Time**: Select the start time for the employee's time segment.

- **End Day of Week**: Select the end day for the employee's time segment.

- **End Time**: Select the end time for the employee's time segment.

6. Repeat Step 5 for all other employee availability specifications, and click **Save**.

Store Work Hours

The Store Work Hours page lets you set up and enter the hours and days of operation for your restaurant. Not all locations in an organization have the same work hours. For example, a stand alone coffee shop might stay open until 9:00 p.m., but a coffee shop in an office building might close at 4:000 p.m. In Store Work Hours, you can establish the store hours, days of operation, and organize them by location.

Setting Up Store Work Hours and Assigning to Locations

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin**, and then click **Store Work Hours**.

3. Click **Add**, and enter a **Name** for the store work hours.

4. Use the drop-down lists and select the start and end times for every day of the week, and click **Save**.

5. To assign the store work hours to locations:

   a. Select the store work hours record that you created, and click **Edit**.

   b. Click the **Assign to Locations** tab, select the locations, and then click **Save**.

School Districts

You can enter school districts into Labor Management to track the districts that employees live in or attend school. By tracking school districts, you can know what tax rules are associated with each district. School districts are displayed and linked on the Employee Configuration page. School districts can also be assigned to locations.

Also, a School District Calendar is available to help determine work availability for employees who are enrolled in schools around the vicinity of the establishment. This information is used for generating Scheduling restrictions in bulk for all students during regular school hours, rather than individually. For example, if a school calendar is known, then any employee who is a student in that district is unavailable during typical school hours such as Monday through Friday from 7:30 a.m. until 3:30 p.m. In addition to standard school hours, calendar information help reveal when students are not in session for holidays and school breaks. Since school districts vary, usually on a county-by-county or state-by-state basis, this information is extremely valuable towards achieving the goal of having a well staffed restaurant.

Entering a School District and Assigning to a Location

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin**, and then click **School District**.

3. Click **Add**, and enter the **Name** of the school district.

4. (Optional) Enter the **County**, and select the **Country** and **State**.

5. Click **Save**.

6. To assign the school district to locations:

    a. Select the school district that you created, and click **Edit**.

    b. Click the **Assign to Locations** tab, select the locations, and then click **Save**.

Creating a School Calendar and Assigning Vacation Days

Create school district calendars for every school district that you create. School calendars help to generate accurate schedules.

You can perform these steps only after creating school districts. You can also create school calendars in conjunction with creating a new school district.

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin**, and then click **School District**.

3. Select a school district and click **Edit**.

4. Click the **School District Calendars** tab, and click **Add**.

5. Enter a **Name** for the school district calendar, and select the **School Year Start Date** and the **School Year End Date**.

6. (Optional) Select the **School Day Stat Time** and the **School Day End Time**.

7. Click the **Vacation Days** tab, and click **Add**.

8. Enter a **Name** for the vacation day. For example, Winter break, Columbus Day.

9. Select the **Vacation Start Date** and **Vacation End Date**.

10. (Optional) select the **Vacation Start Time** and **Vacation End Time**.

11. Click **Save**.

Linking a School District to an Employee

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Employee**.

3. Search for and select the appropriate employee, and click **Edit**.

4. Click the **Contact Information** tab, select the appropriate school district from the **School District** drop-down list, and then click **Save**.

Payroll Banks

The Payroll Bank feature lets you enter information about banks that employees use for direct deposit. This feature can speed up the overall paper work involved in setting up direct deposit for employees.

Configuring Payroll Banks is very similar to configuring school districts, in that after the bank is set up, you can then assign it to the appropriate locations.

Creating Payroll Banks and Assigning to Locations

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin**, and then click **Payroll Bank**.

3. Click **Add**, and on the General tab, enter the **Name** of the banking institution.

4. (Optional) Configure the following fields:

   - **Address Line 1 and 2**: Enter the address for the bank in these fields.

   - **City**: Enter the city for the bank.

   - **Country**: Enter or select the county for the bank.

   - **State/Province**: Select the state or province for the bank.

   - **Postal Cod**: Enter the postal code for the bank.

   - **Building Society Roll Number**: Enter the Building Society Roll Number for the banking institution.

     A building society is a financial institution, owned by its members, that offers banking and financial services. This field is generally reserved for individuals in the United Kingdom. It acts similarly to a bank routing number in the United States.

   - **Alpha Numeric Field**: Enter any additional information that is relevant to the bank in this field.

5. Click **Save**.

6. To assign the payroll bank to locations:

   a. Click the **Assign to Locations** tab.

   b. Select the locations, and then click **Save**.

Job Category Master

Job categories are any user-defined grouping, such as service, operational, or management. When job categories are selected in the Scheduling application, managers can select a job within the category to schedule employees.

Job categories are established and linked to jobs. They are used to categorize the different jobs in a restaurant. Job categories let managers create schedules and report on certain areas of the restaurant. For example, servers, bartenders, and hosts might fall in the Front of House job category. A manager can then schedule the Front of House separate from the Kitchen.

By selecting a job category in the Scheduling application, only the jobs that belong to the selected category appear in the **Job** field. Managers can then schedule all employees in the selected job category or they can narrow the selection by selecting a job and schedule employees within the job.

Creating a Job Category

1. Log into Reporting and Analytics as Sys Admin, click **Labor Management**, and then click **Human Resources**

2. In Human Resources Administration, click **Admin**, and then click **Job Category Master**.

3. Click **Add**, enter the **Name** for the job category, and then select the appropriate options:

   - **Report**: Select this option to use the job category for reporting purposes.

   - **Active**: Select this option to make the job category active for the organization, as opposed to inactive.

   - **Enterprise**: Select this option if the job category is subject to Enterprise Management.

4. Click **Save**.

Linking a Job Category to a Job Definition

1. Log into Reporting and Analytics as Sys Admin, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin**, and then click **Job Definitions**.

3. Search for and select the appropriate job definition, and then click **Edit**.

4. On the General tab, select the **Job Category**, update the fields as needed, and then click **Save**.

   Job categories are often assigned at the same time as labor categories. You can use the Labor Category drop-down list at this time. For more information on Labor Categories, see the Labor Category Master section.

Labor Category Master

Labor categories are used for reporting the number of hours worked and the associated labor costs. For example, you can create separate categories for tipped and non-tipped employees to track and analyze the impact of tip credit upon labor costs. Within the Tipped labor category, you can include job definitions such as server, bartender, food runner, and bus boy. Within the Non-Tipped labor category, you can include job definitions such as hostess, line cook, dishwasher, and food prep.

Note how in the example both Tipped and Non-Tipped categories include employees from both front of house and back of house. Labor category masters are usually more generic than job category masters in order to encompass as many job definitions as possible. However, it is up to the enterprise to determine how labor categories collect employees.

Creating a Labor Category

1. Log into Reporting and Analytics as the System Administrator, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin**, and then click **Labor Category Master**.

3. Click **Add**, enter the **Name** for the labor category, and then select the appropriate options:

    -   **Report**: Select this option to use the labor category for reporting purposes.

    -   **Active**: Select this option to make the labor category active for the organization, as opposed to inactive.

    -   **Enterprise**: Select this option if the labor category is subject to Enterprise Management.

4. Click **Save**.

Linking a Labor Category to a Job Definition

1. Log into Reporting and Analytics as the System Administrator, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Admin**, and then click **Job Definitions**.

3. Search for and select the appropriate job definitions, and then click **Edit**.

4. On the General tab, select the **Labor Category**, update the fields as needed, and then click **Save**.

    Labor categories are often assigned at the same time as job categories. To assign, use the **Job Category** drop-down list. For more information on job categories, see Job Category Master.

4

Human Resources Configuration

Employee administration is one of the most powerful tools Labor Management offers. In this area of the User Interface (UI), you can maintain all human resource information pertaining to employees on an enterprise level. Availability to users is determined by specifying user roles (for example, Sys Admin, Store Manager, and so on). Human Resources maintains vital data about each employee and defines individual tax, wage or salary, performance, related skill levels, and scheduling availability information.

Typically, configuring employees is a standard task carried out whenever a new employee is hired. It can also be used for updating existing employees. It is important that all users of this user interface are properly trained. It is generally carried out at the store level; however, higher level users have the ability to access employee information and make modifications as necessary. Because if its nature, store managers and other users with similar privilege levels should be able to enter and configure employees as they are hired or terminated, as well as if changes in any of their personal information were to take place. For example, an employee who recently marries should not have to contact the system administrator for a change in their exemption status. It seems more likely that these types of changes would be handled within the store.

Human resource information is used by and affected by settings configured in other sections of Labor Management. For example, the pay rate for an employee's position, although assigned to the employee in Employee Administration, is configured elsewhere in Labor Management. Likewise, banking institutions, employee privileges, and so on are all created and defined elsewhere.

Searching for Employees

Employee Administration

General Tab

Contact Information tab

I9 Information Tab

Exemptions Tab

Payroll Information Tab

Status Tab

Location Configuration Tab

Job Rates Tab

POS Configuration Tab

Configuring Employees

Searching for Employees

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Employee**.

3. From the first drop-down list to the left of the page, select the criterion by which you want to search.

    For example, if you want to search for an employee by the last name, select **Last Name**. Similarly, if you want to search for an employee by the payroll ID, select **Payroll ID**.

4. From the second drop-down list, select the search criteria. That is, **Starts With**, **Equals To**, or **Contains**.

    For example, if you want to see a list of employees whose first name is John, select **Equals To**. If you want to see a list of employees whose first name start with the letter J, select **Starts With**.

5. In the field next to the second drop-down list, enter a value corresponding to your search criterion.

    For example, if you want to see a list of employees whose first name is John, enter John in the field. Similarly, if you want to see a list of employees whose first name start with the letter J, enter J.

6. If you want to refine your search further or search by multiple criteria:

    a. Click **Add**, repeat Steps 3 through 5, and then define another search criteria.

    b. From the drop-down list closest to the **Add** button, select **AND** or **OR** depending on your requirements, and then click **Add**.

       If you want the system to show the results that match both search criteria, select **AND**. If you want the system to show the results that matches either of the search criteria, select **OR**.

    c. If you want to add another search criteria, repeat Step 6.

7. If you want to include terminated employees or employees that are on leave in your search, select **Include Terminated & LOA Employees**.

8. Click **Find**.

9. If you want to view all the employees in the system, click **Find All**.

Employee Administration

Employee Administration forms maintain critical information for each employee. Setting up an employee is a multi-step process and a good amount of information is gathered during the configuration. Standard information is entered and used throughout Labor Management. There are seven tabs on the Labor Management Employee Administration screen:

- General

- Contact Information

- I9 Information

- Exemptions

- Payroll Information

- Status

- Location Configuration

General Tab

The General tab is where typical HR information such as name, age, and social security number are entered. The following table describes the fields in the General tab:

Table 4-1   Employee Administration – General Tab Field Description

Field	Description
Prefix	Select an appropriate prefix (for example, Mr., Mrs., and so on) from the drop-down list.
First Name	Enter the first name of the employee.
Middle Name	Enter the middle name of the employee.
Last Name	Enter the last name of the employee.
Suffix	Select an appropriate suffix (for example, IV, PhD, and so on) from the drop-down list.
Check Name	Enter the name of the employee that should appear on all checks.
SSN	Enter the employee's social security number.
Date of Birth	Enter the employee's date of birth (DOB). If DOB qualifies the employee for minor status, the **Work Permit** and **Age Certificate** fields become active
Gender	Select whether the employee is male or female.

Table 4-1   (Cont.) Employee Administration – General Tab Field Description

Field	Description
Ethnicity	Select the employee's ethnicity.
Minor	Select this option if the employee is a minor.
Exclude from EU Directives	Select this option to exclude the employee from the European Union Directives.
Allow Sub Minimum Wage	Select this option if the employee is eligible for wages less than the minimum wage standard.
External Payroll ID	Enter the employee's existing payroll ID. This field does not appear for all organizations. It is an option for organizations who already have payroll IDs established for their employees. If this field is available, then you must enter the employee's payroll ID. If this field is not available, then the system auto-generates an employee ID.
Language	Select the language for this employee. This assignment dictates the language format of the Time Clock Application for the employee. By default, the language is set to the default language of the organization. For example, for the United States, France, and Portugal, the default languages are US English, French, and Portuguese, respectively
OT Exempt	Select this option to exempt the employee from overtime work and pay.
Age Certificate Information	Enter the Age Certificate information in the corresponding fields for minor employees. When the DOB is entered, it triggers the need for minor employee information.
Work Permit Information	Enter Work Permit information in the corresponding fields for minor employees. When the DOB is entered, it triggers the need for minor employee information.
User Alpha 1-5	Enter any alpha values for reporting in these fields.
User Numeric 1-5	Enter any numeric values for reporting in these fields.

Contact Information tab

Employee contact information such as address, phone number, emergency contact person, and so on are entered in this tab. The following table describes all the fields on the Contact Information tab:

Table 4-2   Employee Administration – Contact Information Tab Field Description

Field	Description
Address Line 1 - 2	Enter the employee's street address.
City	Enter the name of the city of residence for the employee.
Country	Enter or select the country of residence for the employee.
State	Select or enter the state or province of residence for the employee. This field is dependent on the **Country** field. Depending on what country is selected, the system provides a drop-down list or a text box for entering the state or province.
County	Enter the county of residence for the employee.
Postal Code	Enter the postal code for the employee's street address.
School District	Select the school district in which the employee resides.
In City Limits	Select this option if the employee's address falls within the city limits.
In City Limits	Select this option if the employee's address falls within the city limits.
Lives on Property	Select this option if the employee's address is where the employee physically resides and not a post office box.
Phone Number	Enter the employee's phone number.
Extension	Enter the extension at which the employee can be reached at the specified phone number.
Unlisted	Select this option to omit the employee's phone number from the Employee Phone List Report.
Fax Number	Enter the fax number for the employee.
Other Number	Enter any alternate numbers where the employee can be reached (cell, pager, and so on).
Email	Enter the employee's email address.
Emergency Name	Enter the name of the employee's emergency contact person.

Table 4-2   (Cont.) Employee Administration – Contact Information Tab Field Description

Field	Description
Emergency Address	Enter the address of the employee's emergency contact person.
Emergency Number	Enter the phone number for the employee's emergency contact person.
Emergency Contact Relation	Enter the relationship between the employee and the emergency contact person (mother, father, and so on).

I9 Information Tab

> **Note:** The contents in this tab may not apply to organizations outside the United States of America.

The I9 Information tab contains information about an employee's citizenship or immigration status, including details about documentation that is required to prove legal status to work in the United States of America.

Acceptable document types are continually updated. Oracle Hospitality has done its best to ensure the most recent and up-to-date documentation options are available in the provided drop-down lists. To ensure your organization is using the most current information, refer to the United States Citizenship and Immigration Services list of acceptable documents found at www.uscis.gov.

The following table describes the fields on the I9 Information tab:

Table 4-3   Employee Administration – I9 Information Tab Field Description

Field	Description
INS Status	Select the employee's Immigration and Naturalization Service (INS) Status. That is, alien, citizen, or permanent resident.
Expiration Date	If the employee is not a citizen, enter the expiration date of the employee's documents.
Alien/Admission Number	If the employee is not a citizen, enter the **Alien Admission Number**.
Identity Document Type	Select the document type.
List A - C	Enter the necessary information in the provided fields for all document types provided.

Exemptions Tab

The Exemptions tab contains information about an employee's marital status, tax exemptions, withholding, and other tax data. Fields are available for federal, state,

county, and city information, if applicable. The following table describes the fields on the Exemptions tab:

Table 4-4   Employee Administration – Exemptions Tab Field Description

Field	Description
Federal	Specify the marital status, exemptions, whether the employee is exempt from paying taxes, any additional withholding, and whether the employee is eligible for earned income credit.
State	Specify the marital status, exemptions, whether the employee is tax exempt, and any additional withholding.
City	(Optional) Specify any additional withholding and whether the employee is exempt from paying taxes.
Country	(Optional) Specify any additional withholding and whether the employee is exempt from paying taxes.

Payroll Information Tab

The Payroll Information tab gives you the ability to deposit payroll funds directly to an employee's bank account. Employees can have two banks assigned to them. The following table describes the fields on the Payroll Information Tab:

Table 4-5   Employee Administration – Payroll Information Tab Field Description

Field	Description
Bank Location	Enter the location of the bank.
Account Type	Select the account type.
Account Number	Enter the employee's bank account number.
Routing Number	Enter the bank's routing number that corresponds to the employee's bank account number.
Amount Type	Select whether to deposit a dollar amount or a percentage amount into the employee's bank account.
Amount	Enter the amount to deposit into the employee's bank account. For example, 100% or $35.00.
Balance	Select this option if any balance will be leftover after the direct deposit takes effect.

Status Tab

The Status tab contains information on the employee's current working status, such as hired, terminated, or leave of absence (LOA), as well as whether or not the employee works full-time or part-time.

The following table describes the fields on the Status tab:

Table 4-6   Employee Administration – Status Tab Static Field Description

Field	Description
Hire Date	Enter or select the date the employee was hired.
Temporary	Select this option if the employee is only working on a temporary basis. For example, seasonal work, summer vacation, and so on.
Part Time	Select this option if the employee works part-time.
Rehire Date	If the employee is rehired, the rehire date appears here.
Hire Status	Select the employee's status: • Hired • Terminated • Leave of Absence

If you select **Terminated** or **Leave of Absence** as the **Hire Status**, additional fields appear. The following tables describe these fields.

Table 4-7   Employee Administration – Status Tab Termination Field Description

Field	Description
Termination Date	Enter or select the date the employee was terminated.
Termination Reason 1-4	Select the reason for terminating the employee. You can select up to four reasons.
Eligible for Rehire	Select whether the employee is eligible for rehire.
Termination Status	Select the termination status. For example, quit, fired, and so on.
Termination Note	Enter any additional information pertaining to the employee's termination.

Table 4-8   Employee Administration – Status Tab Leave of Absence Field Description

Field	Description
Leave Start Date	Enter or select the start date for the employee's leave of absence.
Leave End Date	Enter or select the end date for the employee's leave of absence.
Leave Reason	Enter the employee's reason for taking a leave of absence.
Leave of Absence Note	Enter any additional information pertaining to the employee's leave of absence.

Location Configuration Tab

The Location Configuration tab lets you configure an employee on a by location basis. You can assign an employee to work at more than one location. An employee can be a salaried manager at one location and an hourly chef at another location. Regardless of how many locations the employee is permitted to work, the employee must have only one home store. The location where the employee is clocked in determines what and how the employee is paid.

You can configure the following settings on the Location Configuration screen:

- The stores or locations the employee works

- The jobs the employee works at those stores

- How much the employee is paid for the jobs

- Location-specific POS settings

The Location Configuration tab has two secondary tabs:

1. Job Rates

2. POS Configuration

Job Rates Tab

On the Job Rates secondary tab, you can:

- Assign locations and jobs to an employee

- Define pay rates for the jobs assigned to the employee

- Override the default pay rate for jobs

You can assign employees to more than one job; however, employees must have only one primary job per location. Jobs can include hourly or salary jobs, depending on the needs of the employee, and can vary from location to location. For example, an employee can be a salaried employee at one location and a bartender at another location.

Although most job definitions have default pay rates, you can configure pay rates per employee. For example, the default hourly rate for a hostess is $6.25. However, a hostess with multiple years of employment at the same establishment can have an hourly rate of $9.25.

The following table describes the fields on the Job Rates tab:

Table 4-9   Employee Administration – Job Rates Secondary Tab Static Field Description

Field	Description
Location Name	Select the location for the job rate.
Job Code Name	Select the job name for the employee at the location.
	The letter H after a job code denotes an hourly job. The letter S after a job code denotes a salaried job.
Skill Level	Select the employee's skill level for the job code.
Effective From/To	Select the date range this job is effective for the employee at the location.
Primary Job	Select this option to make the job the employee's primary job at that location.
Exclude From Staff Requirements	Select this option to exclude the employee from staff requirements for this job.

Additional fields appear on this tab to configure and override pay rate information depending on the type of job that you select for the **Job Code Name**. The following table describes the fields that appear when you select an hourly job for the **Job Code Name**.

Table 4-10   Employee Administration – Job Rates Secondary Tab Hourly Job Field Description

Field	Description
Default Pay Rate Applies	Select this option to assign the employee the default pay rate for this hourly job.
Override Pay Rate	If you did not select**Default Pay Rate Applies**, enter the new pay rate to assign to the employee for the job.
Minimum Regular Rate	Shows the minimum regular rate for the job.
Maximum Regular Rate	Shows the maximum regular rate for the job.
Default Regular Rate	Shows the default regular rate for the job.
Overtime Level 1-4 Rate	Shows any applicable overtime levels for the job.

The following table describes the fields that appear when you select a salaried job for the **Job Code Name**. Although all the fields are mandatory, entering a value in any one of the fields automatically populates the others.

Table 4-11   Employee Administration – Job Rates Secondary Tab Salaried Job Field Description

Field	Description
Hourly Rate	Enter the employee's hourly rate.
Daily Rate	Enter the employee's daily rate.
Weekly Rate	Enter the employee's weekly rate.
4 Weeks Rate	Enter the employee's rate for every 4 weeks.
Monthly Rate	Enter the employee's monthly rate.
Annual Rate	Enter the employee's annual rate.

POS Configuration Tab

On the POS Configuration secondary tab, you can configure an employee's location-specific POS security settings. These settings include employee class, cashier settings, employee privileges, and so on. For example, an employee who is a manager at one location and is a bartender at another location has different needs. As a manager, the employee needs access to cash drawers, but as a bartender, the employee does not need those privileges. Typically, these settings are performed at the POS. However, once an organization migrates to Labor Management, these options are no longer available at the POS.

There are two types of security settings:

- Classic

- Enhanced

At this time, the security type is determined by a RES setting. Currently, only Classic Security is fully supported. Depending on how your organization is configured, you may not see all of the fields described in the following table:

Table 4-12   Employee Administration – POS Configuration Secondary Tab Field Description

Field	Security Setting	Description
Location Name	Classic	Select the location where the employee's POS configuration will apply.
PC Application Password	Classic	Enter the PC Application Password for the employee.

Table 4-12   (Cont.) Employee Administration – POS Configuration Secondary Tab Field Description

Field	Security Setting	Description
Employee Class	Classic	Select the employee class. There is no place in the portal to configure employee classes. Enterprises must have Reporting and Analytics installed in order for this field to populate.
Back Office Class	Classic	Select the back office class. There is no place in the portal to configure Back Office classes. Enterprises must have Reporting and Analytics installed in order for this field to populate.
Employee Privilege	Classic	Select the employee's privilege level at the POS.
Cashier	Classic	Select whether the employee has cashier functionality (Classic).
Cash Drawer ID	Classic	Select the cash drawer that the employee can access. The default is **None**, which means no cash drawer is accessible.
LDS ID	Classic	If applicable, enter the liquor dispensing ID number.
User ID	Enhanced	Enter the user ID.
Password	Enhanced	Enter the password that the employee must use to access the POS.
Confirm Password	Enhanced	Reenter the password that the employee must use to access the POS.
User Account Disabled	Enhanced	Select this option to disable the employee's user account.
HTML	Enhanced	Shows any HTML page associated with the user's POS login.
Magnetic Card Number	Enhanced	Swipe the card with the magnetic number to assign to this employee using the mag card reader.

Table 4-12   (Cont.) Employee Administration – POS Configuration Secondary Tab Field Description

Field	Security Setting	Description
User Alpha 6-8	Enhanced	Use these fields to enter any additional alpha values.
User Numeric 6-8	Enhanced	Use these fields to enter any additional numeric values.

Configuring Employees

The following are some common tasks for configuring employees:

- Entering a New Employee

- Configuring a Transferred Employee

- Updating an Employee's Hire Status

- Updating an Employee's Job Codes and Pay Rates

Entering a New Employee

This procedure is the most often performed function throughout the Labor Management Employee Administration pages. Not all steps are required in order to successfully enter an employee into Labor Management.

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Employee**.

3. Click **Add**, and then select a **Home Store**.

4. On the General tab, enter the employee's **First Name** and **Last Name**, and then select the employee's **Date of Birth**.

5. On the Contact Information tab, enter the employee's contact details.

   All fields on the Contact Information tab are optional; however, Oracle Hospitality recommends entering as much information as possible.

6. On the I9 Information tab:

   a. Select the **INS Status**. That is, **Citizen**, **Alien**, or **Permanent Resident**.

   b. If you selected **Alien** or **Permanent Resident** for the **INS Status**, select the **INS Expiration Date**, and then enter the **Alien/Admission Number**.

   c. Select an **Identity Document Type**, and then enter the document details.

7. On the Exemptions tab, configure the federal, state, city, or country tax exemptions.

8. On the Payroll Information tab, enter the banking information for the employee.

9. On the Status tab:

     a. Select the **Hire Date**, and then specify whether the employee works full-time or a part-time.

     b. Make sure that the **Hire Status** is set to **Hired**.

10. On the Location Configuration tab:

     a. On the Job Rates secondary tab, click **Add Job Rate**.

     b. Select the **Location Name**, **Job Code Name**, and the **Effective From** date.

     c. Configure the remaining fields based on the hourly or salary job code selection, and then click **Update List**.

     d. Click the **POS Configuration** secondary tab, and then select the **Location Name**.

       When you select the location, the **Location Name** field automatically populates.

     e. Configure the remaining fields on the POS Configuration tab, including the employe security information fields, and then click **Update List**.

11. Click **Save**.

Entering a Transferred or Borrowed Employee

Since transferred or borrowed employees are typically already in the system, you only need to update their store location information. If the employee is not in the system, then you must follow the steps outlined in Enter a New Employee.

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration page, click **Employee**.

3. Search for and select the appropriate employee, and then click **Add**.

4. Click the **Location Configuration** tab, and then click **Assign Employee to Another Store**.

5. Select a new location from the drop-down list, and then click **Assign**.

6. On the Job Rates secondary tab:

     a. Click **Add Job Rates**, and then select the new location from the **Location Name** drop-down list.

     b. Configure the remaining fields based on the hourly or salary job code selection, and then click **Update List**.

7. Click the **POS Configuration** secondary tab:

     a. Select the **Location Name**, and configure the remaining fields on the POS Configuration tab including the employe security information fields.

       When you select the location, the **Location Name** field automatically populates.

     b. Click **Update List**.

8. Click **Save**.

Employee Hire Status Classifications

There are three hire status classifications for an employee:

1. Hired

2. Terminated

3. Leave of Absence

When an employee is initially hired, the status is Hired. However, throughout the course of employment, the employee's status can change. The following sections detail how to modify the employee status:

- Changing an Employee's Status

- Setting an Employee's Status as Rehired

Changing an Employee's Status

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Employee**.

3. Search for and select the appropriate employee, click **Edit**, and then click the Status tab.

4. To terminate an employee:

   a. Change the **Hire Status** to **Terminated**.

   b. Select the **Termination Date** and the termination reasons (optional).

      You can select up to four termination reasons.

   c. If the employee is eligible for rehire, select **Yes**. If not, select **No**.

      Employees that are not eligible for rehire can be rehired with a system administrator override.

   d. Select the **Termination Status**, enter any additional informational relevant to the termination in the **Termination Note** field, and then click **Save**.

5. To put an employee on a leave of absence:

   a. Change the **Hire Status** to **Leave of Absence**.

   b. Select the **Leave Start Date** and **Leave End Date**.

      Leave reasons have pre-specified periods of time allotted to them. For example, if employees get five days off for bereavement and the start and end dates are beyond that range, the system does not accept the leave of absence.

   c. Select the **Leave Reason**, enter any additional information relevant to the leave of absence in the **Leave of Absence Note** field, and then click **Save**.

Setting an Employee's Status as Rehired

You can rehire only employees whose **Eligible for Rehire** status was set to **Yes** during termination, unless authorized approval is given. To rehire an employee who is not eligible for rehire, a system administrator must access the application and decide to permit the ineligible employee for reinstatement.

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Employee**.

3. Search for and select the appropriate employee, and then click **Edit**.

4. Click **Rehire** from the top menu bar, update any of the information on the various Employee Administration pages as needed, and then click **Save**.

Updating Employee Job Codes and Pay Rates

Employees can have multiple jobs and job codes. The longer an employee works for an organization, the more likely the employee needs more than one job code. The following steps explain how to perform this update:

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Employee**.

3. Search for and select the appropriate employee, and then click **Edit**.

4. Click the **Location Configuration** tab. On the Job Rates secondary tab:

   a. Click **Add Job Rate**, and then select a new **Location Name**.

   b. Configure the other remaining fields based on the hourly or salary job code selection, and then click **Update List**.

5. On the POS Configuration secondary tab:

   a. Select a **Location Name**, and then configure the remaining fields on the tab, including the employe security information fields.

      When you select the location, the **Location Name** field automatically populates.

   b. Click **Update List**.

6. Click **Save**.

5

Human Resources Interface

The Human Resources (HR) Interface is where you enter employee information into a template and upload it to the Labor Management data warehouse. The HR Import process gives you the ability to download a simple spreadsheet, enter employee data at your leisure, and upload it when you are ready. You can store a work-in-progress spreadsheet on your own PC and, when complete, transfer all the data into Labor Management. This significantly reduces the amount of time spent on reviewing multiple employee HR information and manually entering each and every employee into Labor Management. Once the spreadsheet is uploaded to Labor Management, the data entered populates the Employee Administration pages on a per employee basis.

Typically, this is a one time only procedure. Oracle Hospitality suggests uploading all employee data in one action, but, if an organization decides to enter employee data one location at a time, the import process remains the same.

Depending on your user rights and privileges, you may not have access to this feature. If you have questions, contact your system administrator for more information.

The HR Import Template

Downloading/Uploading the Employee Enterprise Template

The HR Import Template

The HR Import Template consists of four spreadsheets. The information found on the template mirrors the information you enter on the Employee Administration pages.

The following table describes the spreadsheets that make up the HR Import Template. See Human Resources Configuration for descriptions of the fields mentioned in the table.

Table 5-1   The HR Import Template

Template Page Name	Description
Options page	This page briefly describes the details of the other pages in the spreadsheet. There are two execution modes: • Mode 1: For inserting employees and configuring POS and job rates information. • Mode 2: For updating employees.

Table 5-1   (Cont.) The HR Import Template

Template Page Name	Description
Employees page	On this page, you are required to enter the following information: • Payroll ID/Data • Home Store • SSN • Last Name • First Name • (Optional) Middle Name • Gender • Date of Birth • Hire Date • Ethnicity You can derive this information from existing HR materials. Further instructions exist within the spreadsheet.
Job Rates page	On this page, you are required to enter the following information: • Payroll ID/Data • Location • Job • Regular Rate • Effective From Date • (Optional) Effective To Date • Primary Job Some fields only require entering zero (0) or one (1) to be valid. Further instructions exist within the spreadsheet.
POS CFG page	On this page, you are required to enter the following information: • Payroll ID/Data • Location • (Optional) POS Password • (Optional) PC App Password • Employee Class • Employee Back Office Class • Cashier • Cash Drawer You can derive much of this information from the settings defined in the POS. Further instructions exist within the spreadsheet.

Downloading/Uploading the Employee Enterprise Template

1. In Reporting and Analytics, click **Labor Management**, and then click **HR Interface**.

2. Save the Microsoft Excel spreadsheet to your hard drive. Change the file extension to `.xls` when saving.

3. Enter all appropriate enterprise employee information, and then save the spreadsheet.

4. In the HR Interface, click **Browse**, locate the updated spreadsheet on your hard drive, and then click **Import**.

6

Payroll Preprocessing Administration

In the Payroll Preprocessing Administration page, you can configure the payment configuration rules that govern time cards and payroll for employees, such as break laws, pay rules, and payroll deductions.

System administrators typically configure these settings during organization setup and do not make changes unless payroll and time-card distribution rules change. The following sections detail these features:

- Organization Configuration

- Labor Pay Rules

- Labor Pay Overtime Rules

- Premium Pay

- Pay Period Calendars

- Break Rule Administration

- Break Rule Location Assignment

- Employee Privilege Assignment

- Location Assignment

- Location Configuration

- Premium Pay Rule Location Assignment

- Work Rules

- Payroll Deductions

- Payroll Deduction Assignment

Your rights and privileges determine your access to the features discussed in this chapter. Contact your system administrator for more information.

Organization Configuration

Configuring the Organization for Payroll

Labor Pay Rules

Weighted Average Overtime

Weighted Average Overtime for Tipped Employees

Creating a Labor Pay Rule and Assigning an Overtime Rule

Organization Configuration

In the Organization Configuration page of Payroll Administration, you can configure the appearance of **Employee Add / Edit Time Card**. For example, you can configure the labels on certain reports using Overtime Hour Levels 1-4 and Overtime Pay Levels 1-4.

The following table describes the options on the Organization Configuration page:

Table 6-1   Organization Configuration Page Field Description

Option	Description
Hide Indirect Tips Prompt	Deselect this option to enable users to specify cash tips in the Employee Time Card Add/ Edit page.
Hide Cash Tips Prompt	Deselect this option to enable users to specify indirect tips in the Employee Time Card Add/Edit page.

Configuring the Organization for Payroll

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Admin**, and then click **Organization Configuration**.

3. Select or deselect any of the fields.

4. Enter appropriate information in the **Overtime Pay Label** and **Overtime Hours Label** fields.

   These fields have a default value. If you have enterprise labor, you cannot set the **Overtime Pay Label** and **Overtime Hours Label** fields to be blank.

5. Click **Save**.

6. If you made changes to the **Overtime Pay Label** or **Overtime Hours Label** fields, log out and log back in to see the changes on the Time Card Add/Edit page.

Labor Pay Rules

You can configure Labor Pay Rules to define the circumstances under which an employee is paid and then assign the rule by location. For example, California law dictates that wait staff must receive the state minimum wage and that their wages cannot be offset by any tip credit. In other states, employers can take tip offset into consideration and set a minimum wage of anywhere between the $2.00 and $4.00.

Weighted Average Overtime

Some states, such as California and New Jersey, do not calculate overtime based on whether the employee works more than a given hours-per-day, week, or pay period threshold. These states require Weight Average Rate (WAR) calculations:

- If an employee works under more than one pay rate, overtime pay is determined by the average pay rate.

- If an employee works under one pay rate, overtime pay is determined by the standard pay rate.

For example, Chris works 10 hours as a bartender at 10$ an hour and 32 hours as a cook at $12 hours, for a total of 42 hours in the week. Without counting overtime hours, Chris receives $100.00 for his bartending shifts ($10 x 10 = $100) and $384.00 for his kitchen shifts ($12 x 32 = $384), for a total of $484.00 for the week. The system then

calculates the amount owed for the two overtime hours by using the following formula:

WAR x (*wage multiplier* - 1) = *overtime wage*

In this example, the overtime *wage multiplier* is 1.5 times his pay rate. To calculate the *WAR*, divide the total pay by the total number of hours worked (*Total Pay / Total Hours*).

[$484.00 / 42] x (1.5 - 1) = $5.76

You can now multiply the wage by the number of hours worked, resulting in $5.76 x 2 = $11.52.

Weighted Average Overtime for Tipped Employees

A tip credit is a monetary or percentage amount (established by US Federal or state government) that can be deducted from the minimum wage to account for tipped employees who primarily make their income on tips. However, when tipped employees work more than one job at more than one pay rate and the organization uses weighted overtime averages to determine overtime rates, the organization must use the minimum wage before any applicable tip credits.

For example, Beth works 38 hours as a server at $2.38 per hour and 7 hours as a bartender at $11.00 per hour, for a total of 45 hours, which includes 5 hours overtime. If the organization uses weighted rates to determine overtime wages, the system calculates the total pay using the following formula:

Regular Pay + Overtime Pay = Total Pay

The *Regular Pay* is the sum of each hourly rate multiplied by the hours worked. In this example, Beth receives $90.44 for her server shifts ($2.38 x 38 = $90.44) and 77$ for her bartender shifts ($11.00 x 7 = $77.00) for a total of $167.44 for the week.

The *Overtime Pay* is calculated using the following formula:

Overtime Pay = [(Minimum Wage x Hours Worked) + (Non-tipped Hourly Rate x Non-tipped Hours Worked)] / Total Hours

If the state minimum wage is $5.15, the formula for Beth calculates the following:

[($5.15 x 38) + ($11.00 x 7)] / 45 = $6.06

You can now multiple the wage by the number of hours worked, resulting in $6.06 x 5 = 30.30. The total pay for Beth then amounts to 167.44 + 30.30 = 197.74.

Creating a Labor Pay Rule and Assigning an Overtime Rule

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Admin**, and then click **Labor Pay Rules**.

3. Click **Add** and then fill out the Main tab:

   - **Name**: Enter a name for the labor pay rule.

   - **Exclude Daily from Weekly Overtime**: Select this option to exclude this labor pay rule from weekly overtime rules.

   - **Enable Weighted Average Overtime**: Select this option to omit this labor pay rule from weighted averages.

- **Require Salaried Employees to Clock In**: Select this option to require salaried employees to clock in and to track their hours worked.

- **Include Salaried Employees in Labor Costs**: Select this option to include salaried employees work hours and pay when calculating labor costs.

- **Number of Hours is Salaried Week**: Enter the minimum number of hours a salaried employee is required to work.

- **Minimum Interval Between Clock-Out and Clock-In**: Select the number of hours and minutes an employee must wait between clocking out and clocking back in.

  For example, if an organization has a 6 hour minimum between shifts and an employee clocks out at 2:00 a.m., the employee may not clock back in for another shift until after 8:00 a.m. If an employee attempts to clock in before the minimum number of hours has passed, manager authorization will be required to complete the clock in.

- **Allocate to Clock-in Labor Date**: Select this option to apply overtime to the date the employee clocked in.

  For example, an employee works from 5:00 p.m. until 2:03 a.m. If this option is enabled, all labor hours will be allocated to Tuesday's shift. The **End OT Accumulated At The End Of Labor Week** option is enabled by default. You can deselect this selection if desired.

- **Allocate to Clock-in Actual Date**: Select this option to calculate the overtime based on the actual date the employee worked.

  For example, an employee works from 5:00 p.m. until 2:03 a.m. If this option is enabled, the 5:00 p.m. until 1:00 a.m. shift will be allocated to Tuesday's shift and the 1:00 a.m. to 2:03 a.m. portion of the shift will be allocated to Wednesday's shift. Both the **End OT Accumulated At The End Of Labor Day** and the **End OT Accumulated At The End Of Labor Week** options are enabled by default. You cannot deselect these options.

- **End OT Accumulated at the End of Labor Day**: This option signifies that overtime is calculated on a daily basis.

- **End OT Accumulated at the End of Labor Week** This option signifies that overtime is calculated on a weekly basis.

- **Effective From/To**: Select the dates of effectivity of this labor pay rule.

4. On the Overtime Rules tab, select the overtime rules that affect this labor pay rule, and then click **Save**.

Creating and Editing a Labor Pay Overtime Rule

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Admin**, and then click **Labor Pay Overtime Rules**.

3. If you want to create a new overtime rule, click **Add**.

4. If you want to edit an overtime rule, select an existing rule and then click **Edit**.

5. Update the following information and then click **Save**:

- **Name**: Enter the name of the Labor Pay Overtime Rule.

- **Overtime Multiplier**: Enter the amount by which the starting hourly wage will be multiplied to calculate the overtime wage.

- **Overtime Level**: Select a level to this rule.

  The level will be assigned to jobs in Human Resources so that different job codes can have different overtime rules.

- **Day: Hours Before Overtime**: Enter the number of hours per day that an employee must work to be eligible for overtime pay.

- **Day: Hours Before Consecutive Overtime**: Enter the number of consecutive hours per day that an employee must work to be eligible for overtime pay.

- **Weekly: Hours Before Overtime**: Enter the number of hours the employee must work per week to be eligible for overtime pay.

- **Weekly: Hours Before Consecutive Overtime**: Enter the number of hours in consecutive days that an employee must work to be eligible for overtime pay.

- **Weekly: Consecutive Days To Start Overtime**: Enter the number of consecutive days in one week an employee must work to be eligible for overtime pay.

- **Weekly: Days In A Week To Start Accumulated Days Overtime**: Enter the number of days in a week an employee must work to be eligible for overtime pay.

- **Minor Rule**: Select this option if this overtime rule applies to minor employees.

- **Effective From/To**: Select the time period within which this labor pay overtime rule is effective.

Labor Pay Overtime Rules

Labor Pay Overtime Rules define how employees are paid overtime, as typically mandated by either state or federal law. Organizations determine how to adhere to regulations and configure the implementation of Labor Pay Overtime Rules.

Once Labor Pay Overtime Rules are configured, you can assign them to specific Child Labor Laws in the Employee Administration page.

> **Note:** Labor Pay Overtime Rules must be linked to Labor Pay Rules and Labor Pay Rules must be assigned to locations.

Consecutive Days Overtime

Organizations can require individuals to work a certain number of hours per week and a certain number of consecutive days within that week before being eligible for overtime pay.

For example, an organization specifies an overtime rule that requires an individual to work 40 hours per week and 3 consecutive days. Therefore, if an employee works 15 hours between shifts on Monday and Tuesday, skips Wednesday, but then accumulates 30 hours from Friday, Saturday, and Sunday shifts, the employee

qualifies for overtime because the employee has worked over 40 hours (15 + 30 = 45) and at least 3 consecutive days (Friday, Saturday, and Sunday).

Linking a Labor Pay Overtime Rule to a Labor Pay Rule

The following procedure is discussed in greater detail in the Labor Pay Rules section.

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Admin**, and then click **Labor Pay Rules**.

3. Select an existing labor pay rule, and then click **Edit**.

4. On the Overtime Rules tab, select the overtime rules that apply to the selected labor pay rule, and then click **Save**.

Premium Pay

Premium Pay is additional pay that is administered at a higher rate, such as overnight work and holiday pay. For example, an employee who agrees to work on Easter Sunday or on Thanksgiving may earn pay at a rate that is higher than the employee's normal pay rate.

Premium Pay Types

Premium Pay Types are used to define the format by which pay is issued. The following tables describes the Premium Pay types:

Table 6-2   Premium Pay Types

Premium Pay Type	Description
Amount	An amount is a flat hourly rate amount or percentage of minimum wage, primary job, highest clocked in rate, or current clocked in rate that can be awarded to the employee. If you select this type, enter a **Start Time** and **End Time**. You must specify the method by which hourly rates are increased. You can select a flat amount or a percentage increase.
	For example, an employee who is working on December 25th receives an extra $50 in compensation for Holiday Work. This would be a flat amount. If you select **Flat Amount**, you must enter the amount by which to pay the employee.
	If you select **Percentage**, you must first identify the percentage of increase or decrease and then specify the basis of the increase or decrease. That is, what existing rate is being increased or decreased by the percentage.

Table 6-2   (Cont.) Premium Pay Types

Premium Pay Type	Description
Hours	Selecting this type denotes that employees will be paid for the hours they worked and at a flat hourly rate amount or percentage of an existing wage. If you select this type, you must specify how many additional hours are paid at a premium rate. Additionally, you must define how the premium pay will be administered, a flat amount or a percentage of an existing pay rate.
Split Shift	State law can require that an employee be paid for an extra hour of work if the employee is scheduled to work two shifts in a day that are more than 1 hour apart. This extra hour is paid to the employee, but may not be included in overtime hours.
	If you select this type, Oracle Hospitality recommends entering the minimum and maximum number of hours between shifts that must pass before premium pay is eligible. For example, some states have laws that dictate that if an employee is scheduled to work a split shift, and the shifts are more than 1 hour apart, the employee must be compensated for that hour.
	Similar to the Amount and Hours Premium Pay Types, you must specify how the premium pay will be administered, a flat amount or a percentage of an existing pay rate.

Defining Premium Pay

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Admin**, and then click **Premium Pay Rules**.

3. On the General tab, enter a **Name** for the premium pay rule, and then select the date from which this premium pay is effective using the **Effective From** date editor.

4. (Optional) Configure the following information:

   • **Description**: Enter a brief description for the premium pay.

   • **Include in Labor Costs**: Select this option to include Premium Pay in labor costs.

   • **Include Minor**: Select this option to make this premium pay available for minor employees.

   • **Days of Week**: Select this option if the premium pay is only available on certain days, and then select the eligible days of the week.

- **Calendar Day**: Select this option if the premium pay is only available on a certain day of the year, and then select both the eligible month and day.

- **Calendar Day Range**: Select this option if this premium pay is only available for a certain calendar range. For example, Thanksgiving weekend.

    - **From Time**: Select the start date for the **Calendar Day Range** by specifying the month and day.

    - **To Time**: Select the end date for the **Calendar Day Range** by specifying the month and day.

- **Effective To**: Select the date the premium pay becomes inactive.

5. Click the **Type** tab, select a **Premium Pay Type**, and then select the start and end times.

6. If you selected **Amount** as the Premium Pay Type, define how the hourly rate will be increased.

    a. If you want to increase a flat rate, select **Flat Amount**, and then enter the hourly rate of the premium pay.

       For example, if the default wage is $8 an hour and the premium pay is $10 an hour, then enter 10 in this field.

    b. If you want to increase a percentage of an existing wage, select **Percentage**, and then enter the percentage to increase.

7. If you selected **Hours** as the Premium Pay Type, update the following fields as needed:

- **Additional Hours**: Enter the number of additional hours that will be paid to an employee if the premium pay conditions are met.

- **Include additional hours in overtime calculations**: Select this option to include any additional premium pay hours in the overtime calculations.

- **Pay Rate for Additional Hours**: Select the amount for an employee's hourly rate to be increased for the premium pay. Options include, **Flat Amount** (requires additional configuration), **Minimum Wage Rate**, **Primary Job Rate**, **Highest Clocked In Rate**, and **Current Clocked In Rate**.

8. If you selected **Split Shift** as the Premium Pay Type, update the following fields as needed:

- **Minimum Hours Between Shifts**: Enter the minimum number of hours between each shift.

- **Maximum Hours Between Shifts**: Enter the maximum number of hours between each shift.

- **Additional Hours**: Enter the number of additional hours that will be paid to an employee if the premium pay conditions are met.

- **Include additional hours in overtime calculations**: Select this option to include any additional premium pay hours in the overtime calculations.

- **Pay Rate for Additional Hours**: Select the amount for an employee's hourly rate to be increased for the premium pay.

  Options include, **Flat Amount** (requires additional configuration), **Minimum Wage Rate**, **Primary Job Rate**, **Highest Clocked In Rate**, and **Current Clocked In Rate**.

9. Click **Save**.

Pay Period Calendar

Pay Period Calendars enable you to specify pay period cycles or when pay periods begin and end. Pay periods can vary depending on the organization, from weekly, biweekly, monthly, and so on. You can configure pay periods to operate on a set period of time, such as weekly, biweekly, monthly, and so on. You can also assign pay periods to an enterprise as a whole or on a location-by-location basis. Some locations of an organization can fall under different regulations and may require pay periods that differ from the enterprise standard.

Creating a Pay Period Calendar

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Admin**, and then click **Pay Period Calendars**.

3. Click **Add**, and then configure the following information:

   - **Name**: Enter the name of the Pay Period Calendar.

   - **Start Date**: Select the start date of the pay period cycle.

   - **End Date**: Select the end date of the pay period cycle.

   - **Frequency**: Select the frequency at which payroll periods will execute.

4. Click **Save.**

Break Rules Administration

You can schedule break categories such as lunch or coffee break in Labor Management. Breaks are defined and configured within the Payroll Administration page and can be of any duration (for example, 30 minutes) and be paid or unpaid, depending on what suits your organization.

Break rules can be assigned to any location and can be automatically or manually entered into the scheduling application. You can assign a break rule to be available for manual scheduling so that when the scheduling manager creates the following week's schedule, the break rule is available to enter into the employee's shifts. If the break rule is configured to assign automatically, then the break rules will be applied when the scheduling manager generates the automatic schedule.

By law, employers are required to ensure that employees are given breaks at specified times during their shift. If these breaks are not taken, or are taken but not within the time that has been defined by law, a serious fine can be levied against the employer. Use of this function can help control this situation.

Creating or Editing a Break Rule

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Admin**, and then click **Break Rules Administration**.

3. If you want to create a new break rule, click **Add**.

4. If you want to edit an existing break rule, select a break rule, and then click **Edit**.

5. Update the following information, and then click **Save**.

   • **Name**: Enter the name of the break rule.

   • **Break Duration**: Enter the amount of time, in minutes, given for the break.

   • **Paid Break**: Select this option if this is a paid break. Leaving it deselected denotes unpaid break.

   • **Minor**: Select this option if the break rule applies to minor employees.

   • **Auto-Schedule Breaks**: Select this option to make the break rule eligible for auto-scheduling within the Scheduling application.

   • **Available for Manual Schedule**: Select this option to make the break rule eligible for manual scheduling in the Scheduling application.

     Oracle Hospitality recommends enabling this option.

   • **Minimum Duration before Break**: Enter the minimum amount of time, in minutes, the employee must work before being eligible for a break.

   • **Maximum Duration before Break**: Enter the maximum amount of time, in minutes, the employee can work before a break is needed.

   • **Duration before Repeatable Pattern**: Select this option if Minimum Duration and Maximum Duration before Breaks are repeatedly used throughout the day.

   • **Effective From/To**: Select the effective dates that apply to the break rule.

Break Rules Location Assignment

Break Rules must be associated to a location. When an employee clocks out, the rule can be configured to prompt the employee for a reason for the clock out. These prompts can be applied toward paid and unpaid breaks, depending on how the organization wishes to configure the Break Rule.

By law, employers are required to ensure that employees are given breaks at specified times during their shift. If these breaks are not taken, or are taken but not within the time that has been defined by law, a serious fine can be levied against the employer. Use of this function can help control this situation.

Assigning a Break Rule to a Location

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Admin**, and then click **Break Rules Location Assignment**.

3. Select the locations to assign the break rule from the Location Selection pane, and click **Add Break Rule** or **Add Minor Break Rule** depending on your requirement.

4. Select the relevant **Break Rule** or **Minor Break Rule**, and then select the effective dates for the break rule.

5. Click the **Config** tab, select the relevant settings that effect the locations that you selected, and then click **Save**.

The following settings are for the selected organization or locations. They do not need to be configured every time a new break rule is assigned.

- **Enforce Schedule Break**: Select this option to ensure the employee is required to take his/her break when it is scheduled.

- **Prompt for Break**: Select this option to prompt employees for confirmation before clocking out for breaks.

- **Authorization Required for Early from Paid Break**: Select this option to require management authorization for employees to clock in early from a paid break.

- **Authorization Required for Late from Paid Break**: Select this option to require management authorization for employees to clock in late from a paid break.

- **Authorization Required for Early from Unpaid Break**: Select this option to require management authorization for employees to clock in early from an unpaid break.

- **Authorization Required for Late from Unpaid Break**: Select this option to require management authorization for employees to clock in late from an unpaid break.

- **Authorization Required for Early to Paid Break**: Select this option to require management authorization for employees to clock out early to a paid break.

- **Authorization Required for Late to Paid Break**: Select this option to require management authorization for employees to clock out late to a paid break.

- **Authorization Required for Early to Unpaid Break**: Select this option to require management authorization for employees to clock out early to an unpaid break.

- **Authorization Required for Late to Unpaid Break**: Select this option to require management authorization for employees to clock out late to an unpaid break.

Employee Privilege Administration

Within Labor Management, you have the ability to configure time clock privileges to employees based on employee privilege levels. This eliminates the need to assign a time clock privilege to each employee and allows employees to be grouped into privilege levels that control when an employee can and cannot clock in. Privilege groups can be set up as collectives within which employees fall, such as front of the house or back of the house. Therefore, the Privilege Group is assigned to the employees.

Creating Employee Privileges

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Admin**, and then click **Employee Privilege Administration**.

3. Click **Add**, and then enter an employee role or position in the **Name** field.

4. Select the appropriate privileges for the employee role, and then click **Save**.

    - **Clock In/Out Outside Schedule**: Select this option to allow employees in this class to clock in and clock out outside the times set in the time clock schedule.

      Employee groups with this privilege can clock in and clock out employees who cannot clock in and clock out outside of their schedule for themselves.

    - **Override Clock In/ Out Grace**: Select this option to allow employees in this class to override the established grace period for clocking in or clocking out and authorize non-privileged employees to do the same.

      Employee groups with this privilege can override clock in and clock out grace periods for employees who cannot override clock in and clock out grace periods for themselves.

    - **Override Scheduled Jobs**: Select this option to allow employees in this group to clock into a job that they are not scheduled to perform. If this option is not selected, an authorization is required when employees attempt to clock into a job they are not scheduled to perform.

      Employee groups with this privilege can override scheduled jobs for employees who cannot override scheduled jobs for themselves.

    - **Authorize Clock Ins**: Select a privilege level for employees in this group for authorizing clock ins. The Clock in Privilege level assigned to the job the employee is clocking in for is checked against this privilege. Valid options are 0 through 3, with zero (0) being the lowest.

    - **Perform Clock In**: Select a privilege level for the employees in this group for clocking into the system. The Clock in Privilege level assigned to the job the employee is clocking in for is checked against this privilege. Valid options are 0 through 3, with zero (0) being the lowest.

    - **Authorize ID Assignment**: Select this option to allow employees in this group to assign magnetic cards (magCard) to other employees.

    - **Clock Out with Open Checks**: Select this option to allow employees in this group to clock out while having open checks without authorization.

      Employee groups with this privilege can clock out employees who cannot clock out with open checks for themselves.

    - **Reprint Time Card**: Select this option to allow employees in this group to reprint their time cards.

      Employee groups with this privilege can reprint time cards for employees who cannot reprint time cards for themselves.

- **Authorize Clock Out with Open Checks**: Select this option to allow employees in this group to clock out while having open checks with proper authorization or permission.

- **Authorize Clock Out with Open Tills**: Select this option to allow employees in this group to clock out while having open tills with proper authorization or permission.

- **Authorize Clock In Out Outside Schedule**: Select this option to allow employees in this group to clock in and clock out outside of their scheduled shift with proper authorization or permission.

Assigning an Employee Privilege Group to an Employee

The following procedure is used when configuring employees from within the Human Resources Employee Administration page. For further information on this procedure, see Entering a New Employee.

1. In Reporting and Analytics, click **Labor Management**, and then click **Human Resources**.

2. In Human Resources Administration, click **Employee**.

3. Click **Add** to create a new employee; or, select an existing employee and click **Edit**.

4. Click the **Location Configuration** tab, and then click the **POS Configuration** secondary tab.

5. From the **Employee Privilege** drop-down list, select the employee group to which the employee belongs, and then click **Save**.

Location Assignment

You can configure restrictions and rules that govern specific locations from the Location Assignment page. You can also assign regulations that apply toward all or some of an organization's locations. From Location Assignment, you can assign the following parameters:

- Work Rules

- Labor Week Start Day

- Forecast Week Start Day

- Store Work Hours

- Labor Share Level

- Schedule Week Start Day

- Start Business Day Fixed Period

- Start Labor Hour

The options that appear for the aforementioned parameters are established in other areas of Labor Management. For example, Work Rules are configured in Payroll Preprocessing. Store Work Hours are configured in Human Resources Administration.

Location Configuration

Within Location Configuration, you can modify and assign various time-sensitive attributes to be enforced at specified locations. This feature lets you assign laws and rules that apply to specific locations for a certain time period. This helps organize which locations are governed by local, state, and federal laws and regulations.

For example, a pay period calendar can be configured for the year 2008 and established on a biweekly cycle. However, days bleed over from 2007 and into 2009; the last few days of 2007 show up on the first pay cycle of 2008 and the last few days of 2008 overlap into 2009. Therefore, when the par period calendar expires, another one will need to be established.

A child labor law is another example of a time-sensitive attribute in that, if an employee is bound by a child labor law, eventually that employee will reach an age where the law is no longer applicable. If a child labor law only affects individuals aged 15 through 17, when the employee turns 18, the law no longer applies. In Location Configuration, you have the ability to determine which locations will be affected by which laws.

Other time-sensitive attributes include labor pay rules and wage and tip laws. All of the attributes on this page are configured elsewhere in Labor Management.

You can only have one labor pay rule, pay period calendar, and wage and tip law per location. But you can have more than one child labor law per location.

Assigning a Time-Sensitive Attribute to a Location

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Admin**, and then click **Location Configuration**.

3. Select the locations to assign the time-sensitive attributes from the Location Selection pane.

4. Select the check box next to the law or rule that you want to assign, and then select the law or rule from the drop-down list and its effective date using the date editor.

   For example, if you want to assign a labor pay rule, select the check box next to the **Labor Pay Rule** drop-down list, and then select the rule to assign and its effective date using the **Effective From** date editor.

5. Click **Save**.

Work Rules

In Labor Management, you can configure general work rules that determine default availability and work hours for each employee. This is to help limit the number of hours employees can work. An organization can decide that an employee should not work more than six hours a day and no more than 40 hours a week. These settings are then carried over into the Employee Availability pages as a scheduling guideline, as well as into the Scheduling application to help limit the number of hours employees are scheduled.

Assigning Work Rules to a Location

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Admin**, and then click **Work Rules**.

3. Click **Add**, and then enter a **Name** for the work rule.

4. In the **Min Hours Per Week** and **Max Hours Per Week** fields, enter the minimum and maximum number of hours an employee can work for a week respectively.

   You can enter any value between 1 through 168.

5. In the **Min Hours Per Day** and **Max Hours Per Day** fields, enter the minimum and maximum number of hours an employee can work for a day respectively.

   You can enter any value between 1 through 24.

6. Click **Save**.

Premium Pay Rule Location Assignment

Premium Pay Rules are assigned to locations. This screen behaves similarly to other Assign to Locations pages. You must specify the locations in the left pane, and then select and apply the Premium Pay Rules from the pane to the right.

Premium Pay Rules are configured in the Premium Pay Rules page. For more information on configuring Premium Pay Rules, see Defining Premium Pay.

Assign a Premium Pay Rule to a Location

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Admin**, and then click **Premium Pay Rule Location Assignment**.

3. Select the locations to assign premium pay from the Location Selection pane, and then configure the following information:

   - **Job Code Name**: Select the job that will be governed by the premium pay.

   - **Premium Pay Rule**: Select the premium pay rule to apply for the job.

   - **Effective From**: Select the date from which the premium pay is effective for the job.

   - (optional) **Effective To**: Select the date the premium pay becomes inactive for the job.

4. Click **Save**.

Payroll Deductions

Deductions allow you to specify what is being deducted from an employee's payroll and why it is being deducted. Deductions can be anything, like employee meals,

health benefits, or 401k. This feature allows organizations to accurately account for what employees are to be receiving, as well as what is to be allocated elsewhere.

Deductions can be based on two separate calculations:

1. Percentage

2. Amount

If using percentage, you must specify a percentage to deduct from the salary or hourly pay. As pay is increased or decreased, the percentage amount adjusts accordingly. For example, an employee has three percent of the weekly paycheck deducted toward 401k. the employee's current weekly paycheck is $1250.00 before taxes. Therefore, every week, $37.50 is removed from the employee's paycheck and applied directly toward the 401k. The employee has recently received a pay increase and now makes $1375.00 weekly before taxes. When the percentage recalculates, the employee now has $41.25 deducted from the weekly paycheck and applied toward the 401k.

If using the amount method, you must specify a certain monetary amount to deduct from the salary or hourly pay with every pay cycle. As pay is increased or decreased, the deduction amount always stays the same. For example, the same employee from the aforementioned example also has health benefits through the organization. Every week, the employee has $52.93 deducted from the paycheck, which goes toward health benefits. When the employee's salary is increased from $1250.00 weekly to $1375.00 weekly, the same amount, $52.93, is deducted. Or, perhaps an enterprise requires new hires to purchase their uniform. The uniform price can be configured as a one-time deduction from the new hire's first pay check.

These specific scenarios can be configured as either of the two available deduction types:

1. One Time

2. Recurring

Although these deductions, whether one-time or recurring, can be created in the Payroll Deduction page, recurring deductions are assigned to employees in the Human Resources Employee Administration page. One-time configurations are set up in the Payroll Preprocessing Payroll Deduction Assignment page.

Creating a Payroll Deduction

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Admin**, and then click **Payroll Deductions**.

3. Click **Add**, and enter a **Name** for the deduction. For example, employee meal program.

4. Select the deduction **Type**, enter the default percentage or amount to reduce from the paycheck depending on the deduction type that you selected, and then click **Save**.

Payroll Deduction Assignment

Now that you have set up payroll deductions, you can assign one-time deductions to employees using the Payroll Deduction Assignment feature. You can search for and select employees individually and assign these one-time deductions on an as needed

basis. The steps required to assign a one-time deduction are very similar to those required for assigning recurring deductions.

Recurring payroll deductions are assigned in the Human Resources Employee Administration page. If the employee has recurring deductions assigned, they appear in Payroll Deduction Assignment for information purposes. You cannot edit recurring deductions from this page.

Assigning a One-Time Payroll Deduction

1. Log into Reporting and Analytics as the System Administrator, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Admin**, and then click **Payroll Deduction Assignment**.

3. Search for and select the employee, and then click **Edit**.

4. Click **Add**, select the **Name** of the payroll deduction, and then enter the deduction amount or percentage in the **Amount/Percentage** field.

5. In the **Effective From** date editor, select the date from which the deduction is effective, and then click **Save** in the One Time Payroll Deduction pane.

6. Once you have completed all deduction assignments, click **Save** on the top menu bar.

7

Payroll Preprocessing

Payroll Preprocessing lets managers view, modify, and create detailed payroll information. It is composed of two general categories:

1. Employee Time Cards: This includes reviewing and modifying existing time cards and viewing time card summary information.

2. Labor Pay Periods: This includes opening and closing pay periods as required.

Payroll Preprocessing gives you the ability to make corrections to existing time cards as well as monitor for time card abuse. With one-click actions, Payroll Preprocessing quickly and efficiently minimizes the amount of man-hours lost calculating payroll information that must inevitably be transferred to the payroll department.

Time Cards

Adding/Editing a Time Card

Adding Other Pay

Time Card Summary

Closing and Reopening a Labor Period

Closing a Labor Period

Reopening a Closed Labor Period

Time Cards

Employee Time Cards let you:

- Create new time cards

- Modify existing POS time card punches

For example, you can use the Time Cards page to make an adjustment if an employee forgot to clock in, clock out, or clocked in late from a break.

After searching for an employee whose time card you want to adjust, the Time Card Detail page for that employee opens. On this page, you can see an overview of the employee's time card information for the current pay period. From there, you can:

- Edit existing time card entry

- Add time cards

- Add other pay

You cannot add nor make adjustments to time cards for a closed pay period; however, you can reopen pay periods if necessary.

The Time Card Detail page for the employee has a number of fields. Similar fields are found on both the Edit Time Card page as well as the Add Time Card page. The following table describes the different types of hours and pay listed in the hours section and pay section of the Time Card Detail page respectively.

Table 7-1   Time Card Detail Page Description

Column	Shows
Total Hours	All total hours worked (regular plus overtime).
Regular Hours	All regular hours worked.
OTH1	All hours worked at the first level of overtime hours. You can configure the label for this field from the Payroll Preprocessing Organization Configuration page.
OTH2	All hours worked at the second level of overtime hours. You can configure the label for this field from the Payroll Preprocessing Organization Configuration page.
Regular $	All regular pay earned.
OTP1	All pay earned at the first level of overtime hour. You can configure the label for this field from the Payroll Preprocessing Organization Configuration page.
OTP2	All pay earned at the second level of overtime hours. You can configure the label for this field from the Payroll Preprocessing Organization Configuration page.
Delinquent Status	If the employee has a time card record that can be considered delinquent, a red check mark appears in this column.

Adding/Editing a Time Card

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Time Cards**.

3. Search for and select an employee, and then click **Edit**.

4. If you want to add a new time card, click **Add Time Card**.

5. If you want to edit an existing time card, select a time card record, and then click **Edit**.

6. Update the following information:

   - **Employee**: Shows the name of the employee for whom you are adding or editing the time card entry.

   - **Location**: Select the location where the employee worked for the time card entry.

   - **Revenue Center**: Select the revenue center where the employee worked.

   - **Job Name**: Select the job name worked for the time card entry for the employee.

   - **Clock In Date**: Select the date of activity.

   - **Clock In Time**: Select the clock-in time for the time card entry.

   - **Clock In Status**: Select the clock in status, for the time card entry.

   - **Clock Out Time**: Select the clock-out time for the time card entry.

   - **Clock Out Status**: Select the clock-out status for the time card entry.

   - **Direct Tip**: Enter all direct tips for the employee for the shift.

     This field is mandatory. No entry results in a zero (0) value.

   - **Indirect Tip**: Enter all indirect tips for the employee for the shift.

     This field is mandatory. No entry results in a zero (0) value.

   - **Reason**: This field is only available if you are editing an existing time card. You are required to enter a reason for the revisions, such as late from break, forgot to clock out, and so on.

     When time cards are edited, a record is made on the time card itself that specifies the date the time card was modified, who modified it, the reason given, clock in and clock out date and time, the job name, and the revenue center affected. This is to ensure proper time keeping is kept and that those capable of changing time cards are kept accountable. Reason Codes are created in the Payroll Administration Reason Codes page.

7. Click **Save**.

Adding Other Pay

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Time Cards**.

3. Search for and select an employee, and then click **Edit**.

4. Click **Add Other Pay** from the top menu bar, and then configure the following information:

   - **Employee**: Shows the name of the employee for whom you are adding other pay.

   - **Location**: Select the location where to apply the other pay.

- **Job Name**: Select the job name to apply the other pay.

- **Description**: Enter a brief description explaining why the employee is receiving other pay.

- **Date**: Select the date of the activity that requires the other pay.

- **Pay Hours**: Enter the number of hours for which the employee should be paid.

- **Pay Amount**: Enter the amount that the employee should receive based on the hours worked.

- **Pay Rate**: Enter the pay rate the employee is receiving for all hours worked

5. Click **Save**.

Time Card Summary

Time Card Summary lets you view the hours worked by employees by date and location. This is different from Employee Time Card in that you are looking at the location or organization as a whole. From the first page of the Time Card Summary you are able to drill-down in one of two directions:

- The date: Shows any and all employees who worked on that date at that location.

- The location: Shows all employees who have valid open time cards at that location.

Time Card Summary consolidates and summarizes payroll information for a single pay period by employee and by job, such as hourly, salary, and non-clock jobs. It displays the employee's total and overtime hours and pay. Drilling-down on any of the employee's names allow you to edit their time card. You can perform this same task through the Employee Time Card page.

Closing and Reopening a Labor Period

In Close Labor Period, you can close an open or an existing labor period. Depending on how many locations need the labor period closed, you must specify the locations.

Once a pay period is closed, you cannot make any modifications to it. If you need to update a closed labor period, you must reopen it through Reopen Labor Period. However, you can only reopen and update the latest pay period.

Closing a Labor Period

1. In Reporting and Analytics home page, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Close Labor Period**.

3. Select a labor period to show the locations.

4. Select the location or locations for which you want to close the labor period, and then click **Close Period(s)**.

Reopening a Closed Labor Period

1. In Reporting and Analytics, click **Labor Management**, and then click **Payroll Preprocessing**.

2. In Payroll Preprocessing, click **Reopen Closed Labor Period**.

3. Select a labor period to reveal the locations.

4. Select the location or locations for which you want to reopen the labor period, and then click **Reopen Period(s)**.

8

Enterprise Time Clock Application

The Enterprise Time Clock Application (TCA) is one of the most revolutionary items in Labor Management. The Enterprise Time Clock communicates directly to the online Labor Management application. When the employee clocks in at the POS, the information is immediately uploaded to the web services application. Payroll and time keeping is quickly and efficiently handled with data transfers.

An organization also has the option of using an in-store cache. This allows clock-in and clock-out information to be stored, and inevitably be uploaded to Labor Management.

In the event of clock-in and clock-out information not reaching the cache, the system opens an Internet connection and transfers the information directly. The information stored in the cache consists of typical time clock transactional data such as employee name and number, job codes, schedules, day punches, clock-in and clock-out times, tips, sales, and so on. This data is uploaded to the web services when the Internet connection is restored.

The Employee Clock retains the similar look and feel that current POS users are already familiar with; it is its behind the scenes functionality that has been altered.

Depending on you user rights and privileges, you may not have access to the features describes in this chapter. If you have questions, contact your system administrator for more information.

Downloading the TCA

TCA POS Configuration

POS Configuration for Non-EM Locations

Setting Up the POS Keys for Non-EM Locations

Removing Access to Areas Managed by Labor Management for Non-EM Locations

POS Configuration for EM Locations

Unsubscribing from the MICROS Enterprise Configuration Utility (MECU)

Setting Up the POS Keys for EM Locations

Removing Access to Areas Managed by Labor Management for EM Locations

Preventing Updates to Non-Labor Management Sites

Adding an Exit Time Clock Button

TCA Printer Configuration for RES

Configuring the Printer

Downloading the TCA

The Enterprise Time Clock Application must be downloaded to the site. This enables the TCA to be accessed at the POS. Until this step is performed, your organization is unable to use any of the TCA functions.

1. Log into Reporting and Analytics as `Sys Admin`, click **Labor Management**, and then click **TCA Download**.

2. Enter your **Restaurant ID** and **Restaurant Password**, and then click **Next**.

   The restaurant ID and password are the same ID and password that was sent during the initial download and installation of the RTA and provided in the Installation Email from the Reporting and Analytics Implementation Group. If you have lost or forgotten your restaurant ID and or password, see the Download Report. You can access the Download Report from Admin Reports in the More Reports page.

3. If the correct site name is shown on the page, click **Download MICROS Timeclock** to begin the download process.

TCA POS Configuration

You must configure the POS in order to support and launch the Time Clock Application. Depending on whether or not a location is using Enterprise Maintenance (EM), the procedures vary.

POS Configuration for Non-EM Locations

The following configurations outline the process for supporting the TCA for Non-EM locations:

1. Setting Up the POS Keys for Non-EM Locations

2. Removing Access to Areas Managed by Labor Management for Non-EM Locations

Setting Up the POS Keys for Non-EM Locations

1. In the POS Configurator, click **System**, and then click **External Programs**.

2. Add a new External Program called `Labor Management Time Clock`, and then set the **Working Directory** to the directory where the TimeClock.exe is located.

   Oracle Hospitality recommends using MICROS Macros to set your directory. This ensures that all directory paths will be the same if you have Windows CE clients. For example, `$(MICROS_DIR_ROOT)\RES\ MyBackoffice`.

3. Set the **Command Line** to the TimeClock.exe setup file, and then click **Save**.

For example, `$(MICROS_DIR_ROOT)\ RES\ MyBackoffice\ TimeClock.exe`

4. In the POS Configurator, click **Devices**, click **Touchscreen Designer**, and then select **Sign In**.

5. For the **Clock In/Out** button, update the **Category** to **External Program** and the **Program** to **Labor Management Time Clock**.

6. Repeat Step 5 for all other touchscreens with clock in and clock out functionality, and then click **Save**.

Removing Access to Areas Managed by Labor Management for Non-EM Locations

The Enterprise Time Clock Application requires some areas in the POS to be turned over for Labor Management access.

1. In the POS Configurator, click **Employees**, and then click **Configurator Access**.

2. For every employee class, remove **Access Privileges** for the following forms, and then click **Save**:

   - **Employees | Employees**

   - **Employee | Jobs**

   - **Employee | Time and Attendance**

   - **Employee | Time Clock Schedule**

   - **Employee | Overtime Levels**

3. In the POS Configurator, click **Employees**, and then click **Back Office Classes**.

4. Update the following options to **None** for all employee classes, and then click **Save**.

   - **Employee Maintenance**

   - **Payroll Processing**

   - **Scheduling**

   - **Forecasting**

   - **System Configuration | Labor**

   - **System Configuration | LM Security & Privileges**

   - **System Configuration | Forecasting**

   - **System Configuration | Restaurant & Regional Settings | School Districts**

5. In the POS Configurator, click **System**, click **Restaurant**, and then click **Options**.

6. Select **Suppress changes in RVC Clk Out/In**, and then click **Save**.

POS Configuration for EM Locations

The following configurations outline the process for supporting the TCA for EM Locations:

1. Unsubscribing from the MICROS Enterprise Configuration Utility (MECU)

2. Setting Up the POS Keys for EM Locations

3. Adding an Exit Time Clock Button for EM Locations

4. Removing Access to Areas Managed by Labor Management for EM Locations

Unsubscribing from the MICROS Enterprise Configuration Utility (MECU)

1. From the Windows Star menu, click **Programs**, click **MICROS Applications**, click **EM**, and then click **Enterprise Management**.

2. Log into the application, click **Subscription**, click **Labor Management**, and then select a store.

3. For Product Item **Labor Management**, unsubscribe the following, and then click **Apply**:

   - **Forecasting**

   - **States and Countries**

   - **user Defined Domains**

4. For Product Item **Employee**, unsubscribe the following, and then click **Apply**:

   - **Labor Change Tracking**

   - **Employee**

5. For Product Item **Labor Settings**, unsubscribe the following, and then click **Apply**:

   - **School Districts**

   - **Work Rules**

6. For Product Item **Payroll**, unsubscribe the following, and then click **Apply**:

   - **Payroll Banks**

   - **Deductions**

7. For Product Item **Scheduling**, unsubscribe **Breaks**, and then click **Apply**

Setting Up the POS Keys for EM Locations

1. In the POS Configurator, click **System**, and then click **External Programs**.

2. Add a new External Program called `Labor Management Time Clock`, and then set the **Working Directory** to the directory where the TimeClock.exe is located.

Oracle Hospitality recommends using MICROS Macros to set your directory. This ensures that all directory paths will be the same if you have Windows CE clients. For example,$(MICROS_DIR_ROOT)\RES\ MyBackoffice.

3. Set the **Command Line** to the TimeClock.exe setup file, and then click **Save**.

   For example, $(MICROS_DIR_ROOT)\ RES\ MyBackoffice\ TimeClock.exe

4. In the POS Configurator, click **Devices**, click **Touchscreen Designer**, and then select **Sign In**.

5. Click the **Version** folder icon and create a new version of that screen for Labor Management.

6. For the **Clock In/Out** button, update the **Category** to **External Program** and the **Program** to **Labor Management Time Clock**.

7. Repeat Steps 5 to 6 for all other touchscreens with clock in and clock out functionality, and then click **Save**.

Removing Access to Areas Managed by Labor Management for EM Locations

1. In the POS Configurator for Enterprise Maintenance, click **Employees**, and then click **Configurator Access**.

2. For every employee class, remove **Access Privileges** for the following forms, and then click **Save**:

   - **Employees | Employees**

   - **Employee | Jobs**

   - **Employee | Time and Attendance**

   - **Employee | Time Clock Schedule**

   - **Employee | Overtime Levels**

3. In the POS Configurator for Enterprise Maintenance, click **Employees**, and then click **Back Office Classes**.

4. Update the following options to **None** for all employee classes, and then click **Save**.

   - **Employee Maintenance**

   - **Payroll Processing**

   - **Scheduling**

   - **Forecasting**

   - **System Configuration | Labor**

   - **System Configuration | LM Security & Privileges**

   - **System Configuration | Forecasting**

- **System Configuration | Restaurant & Regional Settings | School Districts**

5. In the POS Configurator for Enterprise Maintenance, click **System**, click **Restaurant**, and then click **Options**.

6. Select **Suppress changes in RVC Clk Out/In**, and then click **Save**.

Preventing Updates to Non-Labor Management Sites

To prevent non-Labor Management sites from receiving changes that are specific to Labor Management, the UCTConf.exe can be configured to prevent these updates from being received at non-Labor Management sites. The areas dropped will not receive future updates from the specified tables.

1. Launch the **UTCCConf.exe** file located in the \micros\RES\EM\BIN directory.

2. If you already have a configuration in use at both Labor Management and non-Labor Management sites, click **Copy Configuration**.

3. If you do not have a configuration in use at both Labor Management and non-Labor Management sites, click **Create New Configuration**.

4. For the following areas, perform the following functions on the tables:

   a. Back Office Classes: Drop the table EMP_BO_CLASS_DEF.

   b. Configurator Access: Drop the table EMP_CLASSS_CONFIG_ACCESS in Labor Management.

   c. External Programs: Do not make any changes.

   d. Suppress changes in RVC Clk Out/In: Drop by selecting the Drop column for ob_supress_rvc_clk_out from REST_DEF in Core Technologies.

Adding an Exit Time Clock Button

You can add this button to close the Timeclock.exe if a problem occurs.

1. In the POS Configurator, click **System**, and then click **External Programs**.

2. Add a new External Program called Labor Management Time Clock Exit, and then set the **Working Directory** to the directory where the TimeClock.exe is located.

   Oracle Hospitality recommends using MICROS Macros to set your directory. This ensures that all directory paths will be the same if you have Windows CE clients. For example,$(MICROS_DIR_ROOT)\RES\ MyBackoffice.

3. Set the **Command Line** to the TimeClock.exe setup file and enter /e to the end of the time clock executable file.

   For example, $(MICROS_DIR_ROOT)\ RES\ MyBackoffice\ TimeClock.exe /e

4. Click **Save**.

5. Configure a time clock exit button on all touchscreens that have clock in and clock out functionality, and then **Save**.

TCA Printer Configuration for RES

You must configure POS printers to support the Labor Management Enterprise Time Clock Application (TCA). The following configurations detail the steps required to create a printer for the TCA for RES 3700. Follow these procedures to configure the RES 3700 printer to use Labor Management:

1. Configuring the Printer

2. Assigning the Labor Management Printer

3. Update the Time Chits

4. Specifying the Transaction Code

Configuring the Printer

1. In the POS Configurator, click **Devices**, and then click **Devices** again.

2. Add a new device named `Labor Management Printer`, and on the General tab, configure the fields as follows, and then click **Save**:

    • **Device Type**: Select **PosAPI Web Service**.

    • **Network**: Select **99 Server** (set to the network node of the server).

    Do not configure any other fields or tabs in the Devices module.

Configuring the Labor Management Printer

1. In the POS Configurator, click **Devices**, click **User Workstations**, and then click the **General** tab.

2. Add a new record and select **Labor Management Printer** for the **Device Name**.

3. Leave all other fields empty, and then click **Save**.

    You do not need a License Code to use the Labor Management printer.

Updating the Time Chits

By default, time chits print to the device selected for the time chit printer. Therefore, if someone clocks in or out on PCWS01, the time chit will print on Epson Thermal 1. If you need the chit to print on a different printer, follow these steps to change the time chit printer to the desired device:

1. In the POS Configurator, click **Devices**, click **User Workstations**, and then click the **Printer** tab.

2. Select an alternate printer from the **Time Chit Printer** drop-down list, and then click **Save**.

Specifying the Transaction Code

For organizations running RES version 3.2, a Transaction Services code is required for printing purposes. Conversely, RES version 4.0 and later do not need this code.

1. In the License Manager, click the **POS 3700** tab, and then click the **Product / Features** tab.

2. Enter the Transaction Services code in the **Transaction Services** field.

Enterprise TCA Functions

The following functions can be performed at the TCA:

- Clock in and clock out for shifts and breaks.

- Assign mag cards

- Declare tips

9

Staffing

Staffing is a staffing suggestion application that creates and produces accurate staffing requirements based on forecast information. Whenever a forecast is generated, the Staffing application refers to the requirements definitions and determine the staffing requirements needed to meet the demand of the forecasted value.

There are three areas in the Staffing page:

1. Staffing Profile

2. Staffing Administration

3. Staffing Requirements

    Staffing Profiles

    Staffing Requirement Definition Methods

    General Step Method

    Productivity Method

    Shift Method

    Fixed Resource Method

    Recipe Method

    Lead and Lag

    Creating a Staffing Profile

    Creating a General Step Staffing Profile

    Creating a Productivity Staffing Profile

    Creating a Shift Staffing Profile

    Creating a Fixed Resource Staffing Profile

    Creating a Recipe Staffing Profile

    Assign Profile to Organization Level

    Staffing Administration

    Adding and Editing Station Definitions

    Assigning a Station to an Organization Level

    Assigning Skill Levels to Staff Requirements

    Staffing Requirements

Staffing Profiles

You can administer Staffing Profile specifications using this page. You can define as many staffing profiles as needed and assign those profiles to the appropriate organization level.

The Staffing Profile page is divided into two sections:

- Staffing Profile Creation: Add, edit, and copy staffing profiles to create requirement definitions for staffing. Staffing profiles require job assignments.

- Assign Profiles to Organization Level: Specify the staffing profile and scheduling profile to apply to a particular location or revenue center; apply the same settings to all locations at the corporate level.

Staffing Requirement Definition Methods

When adding a job to a staffing profile, the job must be classified as one of the following staffing requirement definition methods:

- General Step

- Productivity

- Shift

- Fixed Resource

- Recipe

General Step Method

The General Step method is used when the requirements are based on the forecast values. Consider the following requirements matrix for the General Step method:

Table 9-1   Example Requirement Matrix for General Step – One Forecast Value

Standards (Forecast Value)	Requirements
Greater than or equal to 0	1
Greater than or equal to 150	4
Greater than or equal to 500	7

In the preceding table, if the forecast value is 120, the staff requirement is 1. Similarly, if the forecast value is 300, the staff requirement is 4.

You can also define the requirements based on the grouping of two forecast values. Consider the following requirements matrix for the General Step method based on two forecast values:

Table 9-2   Example Requirement Matrix for General Step – Two Forecast Values

Standards (Forecast Value) Driver #1	Standards (Forecast Value) Driver #2		
	Greater than 0	Greater than 125	Greater than 230
Greater than or equal to 0	1	3	8
Greater than or equal to 150	4	N/A	N/A

For example, in the preceding table, Labor Management determines the staff requirements based on two forecast values. If the first forecast value is between 1 and 150 and the second forecast value is between 125 and 230, the staff requirement is three employees.

Productivity Method

The Productivity method considers the productivity based on a range of forecast values. The forecast value is multiplied by the productivity factor that you define to determine the labor required. Results are rounded to the nearest integer. Consider the following requirements matrix for the Productivity method:

Table 9-3   Example Requirement Matrix for the Productivity Method

Standards (Forecast Value)	Productivity Factor
Greater than or equal to 0	0.037
Greater than or equal to 0	0.042

In the example, if the forecast number is between 800 and 1200, then that value is multiplied by 0.042 to arrive at the number of staff required to meet the forecasted demand.

Shift Method

If staff requirements do not depend on individual forecast values, the Shift method can be used. For example, for jobs such as cashier, night cleaner, and so on shifts are assigned to every job category or job code. The shifts of the staff are defined per the job code. Only one driver governs the requirements: Net sales of the entire system for the entire business week.

For example, if the net sales for the entire location for the entire business week is less than $50000:

Table 9-4   Example Requirement Matrix for Shift Method – Net Sales Less than $50000

Job Code	No. of Employees	Day		Time	
		From	To	From	To
Cook 1	2	Monday	Friday	08:00	16:00

Table 9-4   (Cont.) Example Requirement Matrix for Shift Method – Net Sales Less than $50000

Job Code	No. of Employees	Day		Time	
		From	**To**	**From**	**To**
Cook 1	1	Monday	Saturday	12:00	02:00
Cook 2	1	Monday	Friday	15:00	19:00
Cook 3	3	Monday	Tuesday	18:00	20:00

If the net sales for the entire location for the entire business week is more than $50000:

Table 9-5   Example Requirement Matrix for Shift Method – Net Sales More than $50000

Job Code	No. of Employees	Day		Time	
		From	**To**	**From**	**To**
Cook 1	4	Monday	Friday	08:00	22:00
Cook 1	3	Monday	Saturday	10:00	20:00
Cook 2	3	Monday	Friday	15:00	23:00
Cook 3	4	Monday	Tuesday	17:00	21:00

Fixed Resource Method

If the staff requirements do not depend on individual forecast values, the Fixed Resource method can be used. For example, for jobs such as cashier, night cleaner, and so on, shifts are assigned to every job category or job code. The staff requirements are defined as per the job category or job code for every day part of every day of the week. Only one driver governs the requirements: Net sales of the entire system for the entire business week.

For example, if the net Sales for the entire location for the entire week is less than $30000:

Table 9-6   Example Requirement Matrix for Fixed Resource Method – Net Sales Less than $30000

Day Part	No. of Employees						
	Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**	**Saturday**	**Sunday**
Breakfast	2	3	2	2	2	2	2
Lunch	3	3	3	3	3	3	3
Dinner	1	1	1	1	1	2	1

If the net sales for the entire location for the entire week is more than $30000:

Table 9-7   Example Requirement Matrix for Fixed Resource Method – Net Sales More than $30000

Day Part	No. of Employees						
	Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**	**Saturday**	**Sunday**
Breakfast	3	3	3	4	4	4	3
Lunch	3	4	4	3	3	4	5
Dinner	2	2	1	2	2	2	1

Recipe Method

The Recipe method is used for defining the detail level or menu item level requirements. Whenever a particular requirement is dependent on the time required for preparing a menu item (e.g. - requirement for a cook), the Recipe method is used.

For example, if it takes 90 seconds to prepare a pizza and the forecast value of sales is 250 pizzas, the location needs (90 multiplied by 250) 22500 seconds of labor efforts. Therefore, for every 15 minutes, the location requires 375 minutes of labor efforts. This translates to a staff requirement of 25 laborers to generate 375 minutes of labor work during 15 minutes.

Lead and Lag

Lead signifies that the forecast for a future time should be used. Lead evaluates the forecasted information for a period in the future and then applies that requirement to a period in the past. For example, if a staffing requirement for 11:15 a.m. to 11:30 a.m. is two servers, the staffing requirement will suggest that two servers be scheduled at 11:00 to compensate for the activity that leads up to that requirement. Lead is typically used when the location needs to plan ahead.

Lag operates in the opposite manner of lead. Lag evaluates the forecasted information that happens in the past to predict for the future. For example, take the job category of dishwasher. If an average dinner rush is between 5:00 p.m. and 8:00 p.m., the restaurant may not need dishwashers from 5:00 p.m. until 6:00 p.m., since there are not that many dishes to wash. Perhaps the staff requirement for dishwashers is only one dishwasher from 4:00 p.m. until 6:00 p.m.. However, when the system evaluates the period of time from 5:15 p.m. until 5:45 p.m., it may detect a considerable jump in sales which usually signifies a considerable jump in dirty dishes. Therefore, the system determines that at 6:00 p.m., one or two more dishwashers are needed to compensate for the increased need for clean dishes and flatware.

Creating a Staffing Profile

1. In Reporting and Analytics, click **Labor Management**, and then click **Staffing Profile**.

2. In Staffing Profile and Assignment, click **Staffing Profile Creation**.

3. Click **Add**, and then enter the **Profile Name** and a **Description** for the profile.

4. (Optional) Select **Aggregate Requirements by Job Code**.

5. Click **Save**.

6. Search for and select the profile that you created, and then click **Add Job**.

7. If you want to add the requirement to an entire job category, select a **Job Category**.

8. If you want to add the requirement for a specific job code, select a **Job Code**.

9. Enter the **Labor Name** and a **Labor Description**, and then select **Active** to enable the job.

10. From the **Method** drop-down list, select the staffing requirements definition by which this job is determined. See the following sections for the appropriate configuration:

   - Creating a General Step Staffing Profile

   - Creating a Productivity Staffing Profile

   - Creating a Shift Staffing Profile

   - Creating a Fixed Resource Staffing Profile

   - Creating a Recipe Staffing Profile

   For detailed descriptions of the staffing requirement definition methods, see Staffing Requirement Definition Methods.

Creating a General Step Staffing Profile

1. Select **General Step** as the **Method** when adding a job to a staffing profile, and then click **Next**.

2. Select the job definition type you want to create, and then click **Next**:

   - **Day Part**: Select this option to add staffing requirements for each serving period.

   - **Day**: Select this option to add staffing requirements for an entire each day.

3. Select the **Duration** of the day part or day, select whether the job definition has a **Lead/Lag**, and then enter the lead or lag duration.

   For more information on lead and lag, see section Lead and Lag.

4. If you are creating a day part job definition and want to configure each day part separately, deselect **Day Part**.

5. Select the revenue centers to which the job definition applies, and then specify whether the site will use one or two forecasting components to determine staff requirements:

   - **One Staff Driver**: Select this option to use one forecasting component.

   - **Two Staff Driver**: Select this option to use two forecasting components.

6. In the Drivers section, select the **Forecast Profile**, **Forecast Component**, order types, and the menu items that apply to the job definition.

   You can assign individual menu items or entire family and major groups.

7. In the Requirement section, enter the **Standards** value and the corresponding **Required Labor Qty.**.

8. If you want to add another standard and required labor quantity, click **Add Row**.

9. Click **Save**.

Creating a Productivity Staffing Profile

1. Select **Productivity** as the **Method** when adding a job to a staffing profile, and then click **Next**.

2. Select the job definition type you want to create, and then click **Next**:

    *   **Day Part**: Select this option to add staffing requirements for each serving period.

    *   **Day**: Select this option to add staffing requirements for an entire each day.

3. Select whether the job definition has a **Lead/Lag**, and then enter the lead or lag duration.

    For more information on lead and lag, see section Lead and Lag.

4. If you are creating a day part job definition and want to configure each day part separately, deselect **Day Part**.

5. Select the revenue centers to which the job definition applies, and then in the Drivers section, select the appropriate **Forecast Profile**, order types, and menu items that apply to the job definition.

6. In the Requirement section, enter the **Standard** and **Productivity Factor**.

7. If you want to add another standard and productivity factor, click **Add Row**.

8. Click **Save**.

Creating a Shift Staffing Profile

1. Select **Shift** as the **Method** when adding a job to a staffing profile, and then click **Next**.

2. Select the appropriate **Forecast Profile**, and then select the revenue centers to which the job definition applies.

3. Enter the forecasted **Net Sales** and the **Count** of employees needed, and then select the days of the week for which the job definition is applicable.

4. Select the shift duration using the **Time From** and **Time To** drop-down lists.

5. If you want add another row to the matrix, click **Add Row**, and then repeat Steps 3 through 4.

6. If you want to add a staff requirement for a a different forecasted net sales, click **Add Matrix**, and repeat Steps 3 through 4.

7. Click **Save**.

Creating a Fixed Resource Staffing Profile

1. Select **Fixed Resource** as the **Method** when adding a job to a staffing profile, and then click **Next**.

2. Select the job definition type you want to create, and then click **Next**:

   - **Day Part**: Select this option to add staffing requirements for each serving period.

   - **Day**: Select this option to add staffing requirements for an entire each day.

3. Select the appropriate **Forecast Profile** for the day part or day, and then select the revenue centers to which the job definition applies.

4. If you are creating a day part job definition and you want to define separate forecast profiles for each day part, deselect **Day Part** and repeat Step 3.

5. Enter the forecasted **Net Sales**, and then enter the employee count needed for each day of the week.

6. If you want to add a staff requirement for a different forecasted net sales, click **Add Matrix** and repeat Step 5.

7. Click **Save**.

Creating a Recipe Staffing Profile

1. Select **Recipe** as the **Method** when adding a job to a staffing profile, and then click **Next**.

2. Select the appropriate **Forecast Profile**, and then select the order types, revenue centers, and menu items that apply to the job definition.

3. Select whether the job definition has a **Lead/Lag**, and then enter the lead or lag duration.

   For more information on lead and lag, see section Lead and Lag.

4. Enter the number of seconds it takes to prepare the recipe in the **Default Efforts Required (in Seconds)** field, and then click **Save**.

Assign Profile to Organization Level

1. In Reporting and Analytics, click **Labor Management**, and then click **Staffing Profile**.

2. In Staffing Profile and Assignment, click **Assign Profiles to Organization Levels**.

3. To assign a staffing profile to a location:

   a. Search for the appropriate location.

   b. In the Staffing Profile column, select the staffing profile from the drop-down list adjacent to the location, and then click **Apply**.

4. To assign a staffing profile to a revenue center:

   a. Click the right arrow next to the location name to expand the location to show its revenue centers.

   b. In the Staffing Profile column, select the staffing profile from the drop-down list adjacent to the appropriate revenue center, and then click **Apply**.

5. If you want to know whether there is any mismatch between the assigned forecast profile and staffing profile for the location, click **Mismatch of Forecast Profiles**.

   For example, if the Atlanta Location has been assigned a forecasting profile focused on gross sales and then assigned a staffing profile based on net sales, when the forecast is run, staff requirements will not be generated since different components are in place. This page lets you know if the staffing profile needs to be adjusted to match the forecasting profile.

6. If you want to lock the schedule for a location or a revenue center, click the plus sign (+) next to the staffing profile of the appropriate location, select either of the following options and then click **Apply**:

   • **Location**: Select this option to lock the schedule to the chosen location.

   • **Revenue Center**: Select this option to lock the schedule to the chosen revenue center.

7. Click **Save**.

Staffing Administration

Configure Staffing Administration specifications using this page. You can define stations and assign those stations to the appropriate organization level. You can also assign skill levels to staff requirements.

The Staffing Administration page is divided into three sections:

1. Stations/Sections Definitions: Create station names and descriptions for assignment to organization levels and skill levels. Aides in organizing staffing requirements.

2. Assign Station to Organization Level: Assign one station or section to many locations or many stations or sections to only one location.

3. Assign Skill Levels to Staff Requirements: View existing skill levels and stations assignments as well as their relationship to staffing requirements, add or edit assignments, and restrict stations to be used only once and only for a single employee.

Adding and Editing Station Definitions

1. In Reporting and Analytics, click **Labor Management**, and then click **Staffing Administration**.

2. In Staffing Station and Skill Levels, click **Station/Sections Definitions**.

3. Click **Add** to create a new station or search for and select an existing station, and then click **Edit**.

4. Update the following fields, and then click **Save**.

- **Station Name**: Enter the name of the station definition.

- (Optional) **Station Description**: Enter a station description.

Assigning a Station to an Organization Level

1. In Reporting and Analytics, click **Labor Management**, and then click **Staffing Administration**.

2. In Staffing Station and Skill Levels, click **Assign Station to Organization Level**.

3. To assign more than one station to a single location:

   a. On the Multiple Stations to Single Location tab, select a location from the Locations pane on the right.

   b. From the Unassigned list in the Stations pane on the left, select the station, and then click the right arrow.

   c. Repeat Step 3-b until the stations that you want to assign appear on the Assigned list.

   d. If you want to assign all the stations on the Unassigned list to the location, click the double right arrow.

   e. If you want to remove any station from the Assigned list, select the station, and then click the left arrow.

   f. Click **Apply**.

4. To assign a single station to multiple locations:

   a. On the Single Stations to multiple Locations tab, select the station from the Stations pane on the left.

   b. From Locations pane on the right, select the locations to which you want to assign the station, and then click **Apply**.

5. Once you have completed assignment, click **Save**.

Assigning Skill Levels to Staff Requirements

1. In Reporting and Analytics, click **Labor Management**, and then click **Staffing Administration**.

2. In Staffing Station and Skill Levels, click **Assign Skills Level to Staff Requirements**.

3. If you want to restrict a station to be used only once and only for a single employee, select **Enforce Unique Station**.

4. Click **Add**, select either a **Job Category** or a **Job Code** for the skill requirement, and then select **Active**.

5. (Optional) Click **Day Part** and deselect the day parts that are not applicable for the requirement. By default, all day parts are enabled.

6. Select the days of the week for which this requirement is applicable, and then click **Next**.

7. Enter the total number of employees needed in the **Requirement** field, and then enter the number of employees needed from each skill level.

8. (Optional) To assign a skill level to a station:

    a. Click **Assign Skill to Station** adjacent to the appropriate skill level.

    b. Select the **Station Name**, and then enter the number of employees needed for the station that you selected.

    c. If you want to assign another station for the skill level, click **Add**, and then repeat Step 8-b.

9. Click **Save**.

Staffing Requirements

The Staff Requirements page defines the staff requirements for various scenarios of forecast values. Requirement definitions are for a specific job category or job code. Whenever a forecast is generated, Labor Management refers to the requirement definitions and arrives at the number of labor hours required to meet the demands of the forecasted value.

Staff Requirements calculate the requirements for a job category or job code for a day part, day, or shift. Staff Requirements consists only of the Generate Manual Staff Requirements page where you are required to enter the location, revenue center, number of weeks to generate staff requirements for, and the staffing start week.

To manually generate staffing requirements, you assign a forecast profile to at least one revenue center for a selected location and configure the following settings:

- Store Work Hours

- Labor Start Week

- Schedule Week Start Day

- Start Business Fixed Period

- Forecast Start Week

- Start Labor Hour

Generating Staff Requirements Manually

1. In Reporting and Analytics, click **Labor Management**, click **Staffing Requirements**, and then click **Generate Manual Staff Requirements**.

2. Select a **Location**, and then (optional) click **Select Revenue Center** and deselect the revenue centers for which you do not want to generate staff requirements.

3. Enter the **Number of Weeks to Generate Staff Requirement**, and then select the date of the start week using the **Staffing Start Week** date editor.

    You can generate a staff requirement for a maximum of eight weeks.

4. Click **Generate**.