

# Oracle® MICROS Labor Management User Guide



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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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Oracle MICROS Labor Management User Guide, Release 20.1

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# Preface

This document provides information and instructions for using Oracle MICROS Labor Management web application, a human resources solution offering tools and functionality that support employee data management and payroll preprocessing.

Labor Management is built upon Oracle MICROS Enterprise Back Office and leverages core functionality shared across all Enterprise Back Office products. The *Oracle MICROS Reporting and Analytics User Guide* provides more information and instructions.

## Purpose

The navigation instructions throughout the documentation may not accurately depict the menu layout for your Oracle MICROS Enterprise Back Office deployment because administrators can customize the name and organization of the groups and links in the sidebar menu. Use the navigation instructions provided as a guideline for locating the links in your deployment, or contact an administrator for assistance.

## Audience

This Oracle MICROS Labor Management document is intended for:

- Administrators, who enter initial configurations and maintain data flow for reporting and forecasting.
- Human Resources, who enter and maintain employee records and maintain system-wide settings, such as compliance with labor laws and job definitions.
- Managers, who perform labor management operations such as entering employee availability and using the staffing and scheduling tasks.
- Point-of-Sale employees, who perform self-service tasks such as clocking in, requesting time off, and declaring tips.

## Customer Support

To contact Oracle Customer Support, access the Support Portal at the following URL:

<https://iccp.custhelp.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 MICROS product documentation is available on the Oracle Help Center at <https://docs.oracle.com/en/industries/food-beverage/>.

**Revision History**

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<b>Date</b>	<b>Description of Change</b>
May 2024	Initial publication.

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# 1

## Using Labor Management

Labor Management enables you to manage labor costs for food and beverage operations. Labor Management calculates projected labor costs when generating schedules and updates those costs based on time card operations performed by employees at Oracle MICROS Point-of-Sale (POS) workstations. Labor Management controls labor expenses through employee clock-in and clock-out restrictions enforced at the workstations. Use Labor Management with Forecasting and Budget to generate more accurate schedules. Labor Management integrates with Reporting and Analytics to provide dashboard views of labor cost data and reporting capabilities on areas such as employee job summaries and payroll summaries.

# 2

## Labor Management Setup

Follow these high-level steps to set up Labor Management. You can also use these instructions as a guideline for troubleshooting and maintenance.

1. Configure Reporting and Analytics:
  - a. Create and configure the organization and locations.
  - b. Enable Labor Management in each level.
  - c. Configure the Labor Management portlets and permissions.
  - d. Add employee details.
2. Configure the Labor Management organization settings.
3. Configure the rules and calendars for locations in the organization.
4. Assign the rules and calendars for each location.
5. Configure payroll settings.

This section consists of the following topics:

### Portlets and Permissions for Labor Management

Reporting and Analytics handles Labor Management roles and permissions through the Labor Management portlets. The *Oracle MICROS Reporting and Analytics User Guide* contains more information about roles and portlets in Reporting and Analytics.

### Human Resources

The **Human Resources** portlet controls access to employee records and human resources administration.

The following table describes the permissions for employee record operations. Configure employee record templates to toggle the visibility of individual fields.

**Table 2-1 Employee Record Permissions**

Permission	Description
Can Add Employee Records	This permission lets users: <ul style="list-style-type: none"><li>• Add a new employee and fill out information in the <b>General, Contact Information, I9 Information, Exemptions, Payroll Information, Status, Location Configuration, and Veteran Status</b> tabs.</li><li>• Assign a job with the default pay rate in the <b>Job Rates</b> section of the <b>Location</b> tab.</li><li>• Configure Point-of-Sale information at a location in the <b>POS Configuration</b> section of the <b>Location</b> tab.</li></ul>
Can View Employee Records	This permission lets users view the <b>General, Contact Information, I9 Information, Exemptions, Payroll Information, Status, and Veteran Status</b> tabs.

**Table 2-1 (Cont.) Employee Record Permissions**

Permission	Description
Can Modify Employee Records	This permission lets users: <ul style="list-style-type: none"> <li>View and edit the employee records.</li> <li>Click <b>Transfer</b> to assign the employee to a new home store.</li> </ul>
Can Assign Employee to Work in Another Store	This permission lets users assign an employee to an away store using the <b>Location Configuration</b> tab. This permission does not let users transfer employees.
Can Add Pay Rates	This permission lets users assign a job with the default pay rate in the <b>Job Rates</b> section of the <b>Location Configuration</b> tab.
Can Modify Pay Rates	This permission lets users assign a job with an override pay rate in the <b>Job Rates</b> section of the <b>Location Configuration</b> tab
Can Modify Historical Pay Rates	This permission lets users set a date in the past as the effective date in the <b>Job Rates</b> section of the <b>Location Configuration</b> tab.  For example, users with this permission can retroactively increase the pay rate for employees to correct a pay rate error or to account for the delayed processing of a pay rate change.
Can View Pay Rates	This permission lets users view employee information. The <b>Location Configuration</b> tab only shows jobs with hourly rates.
Can View Salaried Pay Rates	This permission lets users view employee information. The <b>Location Configuration</b> tab shows jobs with hourly rates and jobs with salaried rates.
Can Add Portal Users	This permission lets users create and assign a Reporting and Analytics user account for an employee using the <b>Portal User</b> tab.  This permission requires the Can Add Employee Records or the Can Modify Employee Records permission.
Can Rehire Employees	This permission lets users click <b>Rehire</b> in the employee records menu to assign a terminated employee to a new job.
Allow Employee Promotion	This permission lets users assign a job with a higher pay rate than the current job.

The following table describes the permissions for organization-wide human resources administration:

**Table 2-2 Human Resources Administration Permissions**

Permission	Description
HR Administrator	This permission gives access to the <b>Admin</b> menu. This lets users view and make changes to organization-wide human resources configurations, such as employee profile templates, job definitions, labor laws, and job categories. This permission does not let users configure employee classes.
Can Use Employee Availability	This permission gives access to the <b>Employee Availability</b> configuration. This lets users view and make changes to working hour availability and unavailability preferences for employees.

**Table 2-2 (Cont.) Human Resources Administration Permissions**

Permission	Description
Can Administer Restricted Employee Classes	This permission gives access to the <b>Access Employee Classes</b> configuration from the <b>Admin</b> menu, and requires the HR Administrator permission.  This lets users control which Point-of-Sale employee classes can be assigned to employees by each Reporting and Analytics role. For example, this permission lets administrators prevent roles with minimal access from creating an employee belonging to a Point-of-Sale administrator class.
Can Assign Premium Pay Rules to an Employee	This permission gives access to the <b>Assign Premium Pay Rules to an Employee</b> configuration. This lets users view, add, and change premium pay assignments to employees.
Disable Validation of WOTC/I9/BG Code	This permission disables validation for Work Opportunity Tax Credit (WOTC), I-9, or BG codes when entered or changed by users belonging to this role. This permission requires enabling Social Security Validation for the United States in the organization settings. Contact your system administrator if the option is not available in your Reporting and Analytics organization.

## Payroll Preprocessing

The **Payment Preprocessing** portlet controls access for viewing and editing employee time cards.

The following table describes the permissions that pertain to viewing, editing, and approving employee pay for a given work period:

**Table 2-3 Time Card Permissions**

Permission	Description
Can View Employee Time Card Records	This permission gives access to the <b>Bulk Edit Time Cards, Time Cards, Time Card Summary</b> , and the <b>View Time Card Summary Shared Employee</b> configurations. This lets users view time cards by employee, by date, and by location.
Can Modify Time Card Records for Home Store Employees	This permission lets users make changes to time cards logged by employees assigned to their store.
Can Modify Time Card Records for non-Home Store Employees	This permission lets users make changes to time cards logged by employees assigned to other stores. This permission can be used for cases such as when an employee fills in at a different location, or to let managers to cover time card approvals for another location.
Can Add Employee Time Card Records	This permission lets users add time cards for employees.
Can Add Employee Other Pay	This permission gives access to the <b>Other Pay Assignment by Location, Other Pay Assignment by Employee</b> , and <b>Other Pay Overheads Assignment</b> configurations. This lets users assign payroll bonuses, deductions, and any other one-time payroll effects to employees. This permission does not give access to creating and configuring Other Pay types.

**Table 2-3 (Cont.) Time Card Permissions**

Permission	Description
Can Delete Open Payroll Period Other Pay Records	This permission shows the <b>Delete</b> button in the Other Pay configuration pages. This permission requires the <b>Can Add Employee Other Pay</b> permission.
Allow non-Homestore Employees to be included in Search Results	This permission lets users to search for and view time cards for employees assigned to other stores.
Restrict Negative Hours Adjustments	This permission stops users from reducing the number of hours worked in a time card.

The following table describes the permissions for payment operations:

**Table 2-4 Payroll Operations Permissions**

Permission	Description
Can Close Labor Periods	This permission gives access to <b>Close Labor Period</b> and lets users close a payroll period.
Can Reopen Closed Labor Periods	This permission gives access to <b>Reopen Closed Labor Period</b> and lets users reopen a closed payroll period.
PP Administrator	This permission gives access to the <b>Admin</b> menu and to the configuration pages for labor rules and restrictions, such as pay rules, overtime rules, break rules, and location assignment. This permission does not let users configure tip pool profiles.
Access to Tip Pool Configuration	This permission gives access to the <b>Tip Pool Profile</b> configuration from the <b>Admin Menu</b> . This lets users configure tip pools and tipping periods for a location. This permission requires the PP Administrator permission.
Access to Tip Pool Collection	This permission gives access to <b>Manual Tip Pool Allocation</b> and lets users manually enter tip pool amounts for an assigned tip pool configuration.

## Scheduling - Schedule

The **Scheduling - Schedule** portlet controls access to the schedule editors for viewing or configuring schedules.

**Table 2-5 Schedule Editor Permissions**

Permission	Description
View Schedules	This permission gives access to the <b>Basic Schedule Editor</b> and <b>Advanced Schedule Editor</b> . This lets users view schedules using either interface.
Can generate a schedule from scratch	This permission lets users create a schedule using the Advanced Schedule Editor without a schedule profile.
Can Edit a Schedule	This permission lets users make changes to a generated schedule.

**Table 2-5 (Cont.) Schedule Editor Permissions**

Permission	Description
Can Approve/Reject Schedule	This permission gives access to <b>Schedule Approval/Rejection</b> and lets users approve or reject a schedule that has been submitted.
Can set locking for a location	This permission shows users the <b>Schedule Lock</b> button when assigning a schedule or staffing profile to a location using the <b>Assign Profiles to Organization Level</b> Staffing Profile menu. The button lets the user lock the schedule at the location level or the revenue center level, preventing other users of the specified level from editing the schedule using the Advanced Schedule Editor.  The Basic Schedule Editor always locks schedules from editing by more than one user. System administrators can set the <b>Enable Multi-User Locking in Basic Schedule</b> organization setting to let more than one user edit a schedule using the Basic Schedule Editor.
Can override the lock	This permission lets users open a locked schedule with the Advanced Schedule Editor. The user can then select whether to take ownership of the lock, causing all unsaved changes from the previous owner to be lost.  This permission does not let users take ownership of a schedule using the Basic Schedule Editor. System administrators can set the <b>Enable Multi-User Locking in Basic Schedule</b> organization setting to let more than one user edit a schedule using the Basic Schedule Editor.
Create Schedule without preselecting RVC	This permission lets users add shifts without selecting a revenue center in the Advanced Schedule Editor.
Can Recall Unapproved Schedule	This permission lets users click <b>Recall</b> in the Advanced Schedule Editor to undo the submission of a schedule that has not yet been approved or rejected.
Can Edit Approved Schedule	This permission lets users make changes to an approved schedule, and then publish the updated schedule for approval.

## Scheduling - Admin

The **Scheduling - Admin** portlet controls permissions for viewing and editing schedule creation profiles.

**Table 2-6 Schedule Profile Permissions**

Permission	Description
View Schedule Profiles	This permission gives access to <b>Schedule Profiles</b> . This lets users view schedule configuration profiles for the organization.
Add/Edit/Delete Schedule Profiles	This permission lets users add or delete schedule profiles.

**Table 2-6 (Cont.) Schedule Profile Permissions**

Permission	Description
Access Role-based Edit Configuration	This permission gives access to <b>Schedule Edit Restrictions</b> . This lets users define how much a role can change the total Labor Cost % of a schedule. For example, if a user belonging to a role with a limit of 50% makes changes to a schedule with 20% Labor Cost, the user can add, delete, or modify shifts so that the schedule results in a Labor Cost% of no less than 10% (-50%) and no more than 30% (+50%).

## Staffing - Profile

The **Staffing - Profile** portlet controls permissions for viewing and editing staffing requirements profiles.

**Table 2-7 Staffing Profile Permissions**

Permission	Description
View Staffing Profile	This permission gives access to <b>Staffing Profile Creation</b> . This lets users view a list of staffing profiles, a list of job profiles assigned to each staffing profile, and the specific configurations for each job profile.
Add/Edit/Delete Staffing Profile	This permission lets users add, change, and delete staffing profiles and job profiles associated with the staffing profile.
View Assignment To Org Level	This permission gives access to <b>Assign Profiles to Organization Level</b> . This lets users view the staffing profiles and scheduling profiles that have been assigned to organizations, levels, and locations.
Add/Edit/Delete Assignment To Org Level	This permission lets users assign staffing profiles and scheduling profiles to organizations, levels, and locations.

## Staffing - Admin

The **Staffing - Admin** portlet controls permissions for viewing and editing skill requirements and station assignments for locations.

**Table 2-8 Staffing Profile Permissions**

Permission	Description
View Stations/Sections	This permission gives access to <b>Station/Sections Definitions</b> . This lets users view the list of stations created for locations in the organization.
Add/Edit/Delete Stations/Sections	This permission lets users create, change, or delete stations for the organization.
View Assign Station to Organization Level	This permission gives access to <b>Assign Station to Organization Level</b> . This lets users view the stations that have been assigned to locations.
Add/Edit/Delete Assign Station to Organization Level	This permission lets users assign multiple stations to a single location, or assign a single station to multiple locations.

**Table 2-8 (Cont.) Staffing Profile Permissions**

Permission	Description
View the assignment of Skills and Stations to Staffing Requirements	This permission gives access to <b>Assign Skill Levels to Staff Requirements</b> . This lets users view the skill levels and stations that have been assigned as required.
Add/Edit/Delete the assignment of Skills and Stations to Staffing Requirements	This permission lets users assign skills and stations as staffing requirements for specific jobs and specific days of the week.

## Staffing - Requirements

The **Staffing - Requirements** portlet lets users generate a staffing requirements forecast on demand.

## Scheduling - Employee Self Service

The **Scheduling - Employee Self Service** portlet controls the actions that can be taken by location employees regarding their shifts and schedules.

**Table 2-9 Employee Self Service Permissions**

Permission	Description
Can Use Management Request Approval	This permission gives access to <b>Management Request Approval</b> . This lets users approve or reject schedule changes for employees under their management.
Can View Employee Schedule with In-time only	This permission gives access to <b>Employee Schedule</b> , which lets users access their approved schedules and view the start times for every shift. Users with the <b>Can View All Function</b> privilege can also see the end times for every shift.
Can View All Function	This permission lets users request shift changes, request time off, and use the shift pool through the <b>Employee Schedule</b> .
Can Use Request Shift Change	This permission lets users request shift changes through the <b>Employee Schedule</b> .
Can Use Request Time Off	This permission lets users request time off through the <b>Employee Schedule</b> .
Can Use Shift Pool	This permission lets users send and take shifts in the shift pool through the <b>Employee Schedule</b> .
Can Access Employee Master Data on Mobile ESS	This permission lets users access contact info for employees.

## Configuring Locations for Labor Management

Labor Management enables you to assign configurations at the location level. This lets you define configurations that suit each individual location while retaining usability for configurations. To ensure legal compliance, optimal performance, reporting accuracy, and compatibility with all available features, set up the following for each location:

1. In Reporting and Analytics, create configurations for the following rules and calendars:



Configuration	Go To
Clocking grace periods and clocking privileges	<a href="#">Timekeeping</a>
Overtime pay rules and rates	<a href="#">Overtime</a>
Premium pay, bonuses, and deductions	<a href="#">Premium Pay, Bonuses, and Deductions</a>
Compliance with regional wage laws and tip laws	<a href="#">Labor Law Compliance</a>
Compliance with regional child labor laws	<a href="#">Labor Law Compliance</a>
Pay period intervals for payroll tracking and calculations	<a href="#">Pay Periods</a>
Store work hours, break periods, and restrictions	<a href="#">Work Hours and Break Periods</a>
Tip pool collection and distribution methods and amounts	<a href="#">Tip Pools</a>
Human resource settings such as: <ul style="list-style-type: none"> <li>• Adding employees</li> <li>• Ethnicity</li> <li>• Skill level definitions</li> <li>• School district information</li> <li>• Direct deposit bank information</li> </ul>	<a href="#">Employee Management</a>
Schedule creation and approval	<a href="#">Scheduling</a>
Staffing requirements and skill level assignments	<a href="#">Staffing</a>

2. In Reporting and Analytics, click **Labor**, click **Payroll Administration**, click **Admin**, and then click **Location Configuration**.
  - a. In the **Location Selection** list, select the location.
  - b. To assign rules for time-keeping and labor calculations, select **Labor Pay Rule**, and then select a configured rule.
  - c. To assign a pay period, select **Pay Period Calendar**, and then select a configured pay period cycle.
  - d. To apply wage and tip compliance rules, select **Wage and Tip Law**, and then select a configured set of rules.
  - e. To apply child labor compliance rules, select **Child Labor Law**, and then select a configured set of rules.
  - f. To assign collection and distribution for implementing a tip pool, select **Tip Pool**, and then select a configured tip pool profile.
  - g. For each configuration, select a start date for enabling the rule at the location. You cannot select an earlier day than the start date configured in the rule.  
You can set an end date for child labor laws.
  - h. Click **Save** to save changes for the selected locations.
3. To verify the **Location Configuration** settings for a location:
  - a. In Reporting and Analytics, click **Labor**, click **Payroll Administration**, click **Admin**, and then click **Configuration Review**.
  - b. Select a location, and then click **Edit**.
  - c. Verify that all settings are configured and active.

## Configuring Password Security

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Organization Configuration**.
2. Enter a **PC Application Password Exclusion Prefix** to prohibit login names with the entered prefix from logging into Labor Management.
3. Select whether you want to enforce unique Point-of-Sale passwords through Labor Management. If you do not select this option, the Point-of-Sale for each location enforces uniqueness using their respective settings.
4. Select to enable alphanumeric passwords for Labor Management login credentials. If you do not select this option, employees must set a numeric password.
5. Select whether you want to automatically generate a password when creating users.

## Configuring Social Security Number Security

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Organization Configuration**.
2. Select the Social Security Number region from the **SSN Validation** drop-down.
3. Select whether you want to enforce Social Security Numbers **Uniqueness Setting** by organization or by levels such as locations.

## Configuring Magnetic Card Security

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Organization Configuration**.
2. To ensure magnetic card uniqueness across locations, select **Enforce unique MagCard Number** and then click **Save**. This option must be enabled for integrations with Symphony POS.

If the system detects duplicate magnetic card IDs, the system lists the duplicate records. Manually update the IDs to make them unique.

3. To remove the MagCard number associated with a terminated employee, click **Remove MagCard Number on Termination**. When the employee is terminated, the magnetic card field will be cleared in the POS configuration record. This option goes into effect for updated records and is not retroactive. This option must be enabled for integrations with Symphony POS.

 **Note:**

- If **Enforce unique MagCard Number** is selected and you update an employee with a magcard value that is already in use, then this message appears: **Magnetic card is already assigned for '\*\*\*\*\*'. Assign to this Employee?** Click **OK** to remove the value from the original employee and save for the current employee.
- If **Enforce unique MagCard Number** is deselected and you attempt to update an employee with a magcard value already in use, then this message appears: **Another employee is using this MagCard Number at Location \*\*\*\*\*.** A unique magcard number must be assigned to this employee.

## Configuring Payroll Preprocessing Behavior and Overtime Labels

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Organization Configuration**.
2. Update the form, and then click **Save**.
  - a. If you do not want employees to declare tips while creating or editing their time cards, or if your organization does not require tipping, you can select **Hide Indirect Tips Prompt** and **Hide Cash Tips Prompt**. Make sure to provide a separate method for employees to declare their tips.
  - b. To allocate overtime hours as an away store instead of standard overtime pay, select **Allocate Overtime to Away Store**.
  - c. If you do not want Labor Management to perform database optimization immediately after an administrator makes changes, select **Delay Labor Aggregation After Adjustment**.
  - d. Enter overtime, overtime pay, and overtime hours labels. Do not leave a blank field.
  - e. Select **Show terminated employees in Other Pay** and then enter a number of months. Labor Management includes the amount paid to terminated employees within the last entered number to months under Other Pay.

## Choosing the Pay Rate Modifier

Labor Management enables you to set up rules for modifying pay rates. Use the following table to access more information on pay rate modifiers:

**Table 2-10 Pay Rate Modifiers**

I Want To	Go To
<p>Configure rules for when an employee surpasses the maximum work hours specified for them or for their store. The system treats the additional hours worked as overtime hours, and automatically applies a configured overtime rate for these hours instead of the standard pay rates for the job.</p> <p>Configure legal compliance with overtime eligibility and the calculation of overtime wages.</p>	<a href="#">Overtime</a>
<p>Configure pay rate modifiers that you can apply to individual employees or locations for specific time frames.</p> <p>For example, you can configure a holiday to apply a 1.2 pay rate modifier, weekends to apply a 1.1 pay rate modifier, or working a 5-7 PM rush hour period on Fridays to give a flat \$15 pay rate modifier.</p>	<a href="#">Premium Pay, Bonuses, and Deductions</a>
<p>Configure one-time pay rate modifiers that you can apply to individual employee time cards.</p> <p>For example, you can configure a \$20 bonus as gratitude for an employee working an emergency shift. You can also configure a \$75 pay deduction for a to account for replacing a damaged uniform.</p>	<a href="#">Premium Pay, Bonuses, and Deductions</a>

## Configuring Reason Codes

Labor Management uses reason codes to indicate types of time card adjustments, black out periods, pay rate changes, and leave of absence. After you set up reason codes, Labor Management users select them when completing forms in the application.

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources** or **Payroll Preprocessing**, click **Admin**, and then click **Reason Codes**.
2. For each reason type in the application, select the reason type, and then click **Select**.
3. Click **Add**, enter a name for the reason, and then click **Save**.
  - a. For time card adjustments, select **Default** to set a new default reason.
  - b. For leaves of absence, enter the **Maximum Days** that the employee can request off.
  - c. For forecasts, click the **Reason Category** tab to add categories, and then select the category for the reason.

## Configuring External Payroll ID

When an employee is created, you can configure the system to let you assign an External Payroll ID.

1. To enable the External Payroll ID option:
  - a. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Organization Configuration**.
  - b. Select **Allow User Defined Payroll ID**.

 **Note:**

Optionally, also select **Enforce User Defined Payroll ID Uniqueness by Organization** which lets you update the external payroll ID from Labor Management.

- c. Click **Save**.
2. Before enabling Symphony to use the External Payroll ID as the object number:
  - Confirm that all transactions have posted from all locations.
  - Confirm that all the existing External Payroll IDs meet the guidelines defined in step 5. If there are existing records that do not meet the guidelines, the system does not let you enable the feature. To update existing external payroll IDs, follow the note in step 1.
3. To enable Symphony to use the External Payroll ID as the object number:
  - a. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Organization Configuration**.
  - b. Select **Use External Payroll ID As Object Number**.
  - c. Click **Save**.
4. Depending on which release number you have, follow one of these options:
  - If your release number is 20.1.14 or earlier, in Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Employee**, and then click **General**.
  - If your release number is 20.1.15 or later, in Reporting and Analytics, click the side navigation menu, click **People**, click the person, click **Manage Employment Information**, and then click **General**.
5. In the **External Payroll ID** field, enter an ID. Keep the following guidelines in mind when entering the ID:
  - It must be unique across the entire organization.
  - It must be a numeric value in the range of 1 - 999,999,999.
  - It can't be created with a null value.
  - You can't change the value after it's assigned.

# 3

## Timekeeping

Labor Management integrates with Oracle MICROS Point-of-Sale (POS) workstations to enforce timekeeping rules at the workstations.

### Configuring Timekeeping

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Labor Pay Rules**.
2. Click **Add** or select a set of rules to edit them.
3. To require time-keeping for salaried employees, select **Require Salaried Employees To Clock In**.
4. To define a minimum amount of time that must elapse after clocking out before an employee can clock in, select an hour and minute for **Minimum Interval Between Clock-Out and Clock-In**.

For example, if you set the interval to 6 hours, an employee that clocks out at 2 AM cannot clock in until after 8 AM without manager authorization.

5. To close all open timecards at a designated time for End of Day operations, select a time from the **Scheduled Time To Clockout All The Open Timecards** drop-down list.
6. Use the **Effective From** date editor to select the first day in which the rule becomes active. You can use the **Effective To** date editor to select a day in which the rule becomes inactive.
7. To restrict access to the Time Clock Application to scheduled employees, perform the following steps. This option requires that managers authorize employees to clock in when not scheduled to work.
  - a. Click the **Time Clock Schedule** tab, and then select **Enable Time Clock Schedule**.
  - b. To let employees select the job to which they are clocking in, select **Enable Scheduled Job Override**.
  - c. If an employee does not have permissions to perform early or late clock-in and clock-outs, you can select options under **Authorization Required For** to enable managers to authorize the early or late clocking operations.
  - d. To set a time in minutes during which an employee can clock in and clock out early or late without requiring manager authorization, enter values for the respective **Grace Period** fields.
8. Click **Save**.

### Configuring Timekeeping Privileges By Employee

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Employee Privilege Administration**.
2. Click **Add**, or select an existing set of privileges and then click **Edit**.

3. Enter a **Name** for the configuration. Establish a naming scheme that suits your organization, because the configuration is assigned at the employee details level.  
For example, you can name the configuration `Managers`, but because you assign the configuration at the employee level, the application does not prevent assigning the configuration to non-manager employees.
4. Select a privilege level from 0 through 3, with 0 being the lowest, that the application checks against the clock-in privilege assigned to the job.
  - a. **Authorize Clock Ins:** Authorizing clock ins by other employees.
  - b. **Perform Clock In:** Clock in to the system.
5. Update selections for the form as described in the following table, and then click **Save**:

**Table 3-1 Employee Time Keeping Privilege Configurations**

Option	Description
Clock In/Out Outside Schedule	Employees can clock in or clock out when they are not scheduled for work.
Override Clock In/Out Grace	Employees can override the configured grace period for other employees.
Override Scheduled Jobs	Employees can clock into an unscheduled job without requiring authorization.
Authorize ID Assignment	Employees can assign magnetic card ID numbers to other employees.
Clock Out With Open Checks	Employees can clock out while having assigned open checks without requiring authorization.
Clock Out With Open Tills	Employees can clock out while having assigned open tills without requiring authorization.
Reprint Timecard	Employees can reprint their time cards.
Authorize Clock Out with Open Checks	Employees can provide authorization when another employee wants to clock out with assigned open checks.
Authorize Clock Out with Open Tills	Employees can provide authorization when another employee wants to clock out with assigned open tills.
Authorize Clock In Out Outside Schedule	Enables an employee to clock in or out when they are not scheduled for work and to authorize other employees to do so.
Limit Clock In to Workstations in RVC	Restrict employees to clock in only at workstations belonging to their assigned revenue center.
Limit Clock Out to Workstations in RVC	Restrict employees to clock out only at workstations belonging to their assigned revenue center.

# 4

## Labor Law Compliance

Labor Management enables you to define settings to comply with child labor laws and wage and tip laws. Compliance requirements can vary by location. Review compliance requirements for your location before defining settings.

### Configuring Compliance with Wage and Tip Laws

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Wage and Tip Law**.
2. Enter the **Minimum Wage** as required by law.
3. If federal or state law includes maximum tip credit restrictions, enter one or both of the **Maximum Tip Credit Amount** and **Maximum Tip Credit Percentage**.

A tip credit is the percentage or monetary amount set by federal or state law that is deducted from the minimum wage of tip-applicable employees.

For example, state law sets a \$6.15 minimum wage and allows up to a 50 percent tip credit if the employee receives enough tips to earn the minimum wage amount for each hour. If the employee's combined earnings (tip plus wage after tip credit adjustments) average out to being less than the minimum wage, the employer must make up the difference.

4. If federal or state law sets a separate minimum wage for tipped jobs:
  - a. Select **Minimum Wages for tipped jobs**.
  - b. Enter the minimum wage for jobs that qualify for tips. This value overrides the standard minimum wage.
  - c. Enter the minimum wage for when an employee becomes eligible for overtime pay while working a job that qualifies for tips. The weighted average overtime formula uses the value entered in this field instead of the minimum wage entered in Step 4b. [Weighted Average Overtime with Tip Credit](#) contains further information regarding the calculation of overtime pay with tip credit.
5. Select the starting date for law, and then click **Save**.

### Configuring Compliance with Child Labor Laws

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Child Labor Law**.
2. Click **Add**, click the **General** tab, and then set the age and labor restrictions:
  - a. Enter the permissible age range for the law or restriction.
  - b. Enter the maximum number of consecutive days that employees in the entered age range can work.
  - c. Select whether employees in the entered age range are required to show an age certificate and a work permit by law.
  - d. Select the start date for the law or restriction. If applicable, select an end date.



3. Click the **Overtime Rules** tab and select the overtime rules that apply to the law or restriction. This tab only shows overtime pay rules created for minor employees or employees subject to work restrictions.
4. Click the **Work Restrictions** tab and specify additional restrictions for school days and non-school days.
5. Click **Save**.

# 5

## Pay Periods

Pay periods define the start and end of pay cycles. You can assign pay periods at the organization level or you can assign them at the location level. For example, regulations prohibit a group of locations from using the organization-level pay period. You can set up a separate pay period and assign it to each of those locations.

### Configuring a Pay Period Cycle

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Pay Period Calendars**.
2. Click **Add**, or select pay period cycle and click **Edit**.
3. Select the **Start Date** and **End Date** for the pay period cycle.
4. Select the pay period interval from the **Frequency** drop-down:
  - Weekly: Every 7-day interval beginning with the start date.
  - Bi-weekly: Every 14-day interval beginning with the start date.
  - Four Weeks: Every 24-day interval beginning with the start date.
  - Monthly: Every start of the month.
  - Semi-Monthly: Every start of the month and a day in the middle of the month.
  - Single Pay Period: A single pay period extending from the start date to the end date.

### Closing a Pay Period

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, and then click **Close Labor Period**.
2. Select a pay period, and then select one or more locations, then click **Close Period(s)**.
3. You can no longer create or adjust time cards for the closed period.

### Reopening a Pay Period

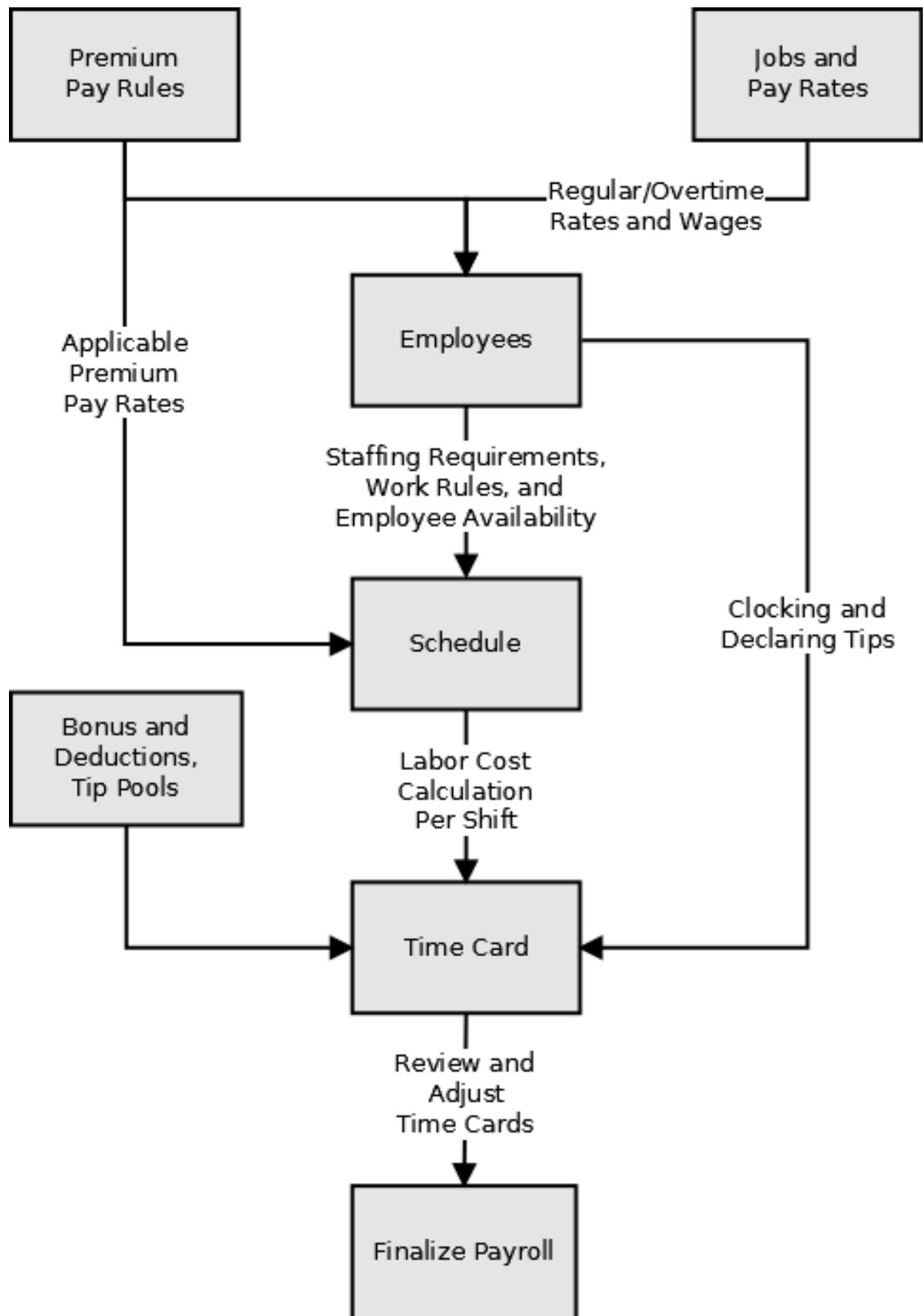
1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, and then click **Reopen Closed Labor Period**.
2. Select a pay period, and then select one or more locations, then click **Reopen Period(s)**.
3. You can now create or adjust time cards for the reopened period.

# 6

## Preprocessing Payroll

Labor Management enforces the configured employee, location, and job constraints to generate a time card for every employee shift. Authorized employees can then review and make adjustments to time cards. When the pay period ends, authorized employees can finalize the time cards by closing the pay period, and then perform the steps needed to process the payroll.

The following image provides an overview of the data and constraint workflow:



## Using Payroll Preprocessing

These instructions provide guidelines for preprocessing the payroll at the end of a pay period:

1. Review time cards for the pay period.
2. If needed, adjust time cards for the pay period.
3. Close the pay period. Employees can no longer create or adjust time cards for the pay period.

Authorized employees can reopen closed pay periods to create or adjust time cards.

## Time Cards

Employee Time Cards consist of the following information:

- Shift information (clock-in date, time, and clock-out time)
- Clocking status
- Job and total wage due
- Direct and indirect tip amounts
- Premium pay hours and wage due

## Viewing a Summary of Time Cards

You can use the Time Card Summary screen to view a consolidation of time card information by location and by store, with the ability to drill down to:

- View a list of all open time cards at a selected location.
- View a list of all open time cards at a selected location and date.
- Adjust individual employee time cards.

## Viewing a Summary of Time Cards for Shared Employees

You can use the Time Card Summary Shared Employee screen to view a consolidation of time card information pertaining to employees shared by the home store to which you belong, with the ability to drill down to:

- View a list of all open time cards for employees that worked more than one location.
- View a list of all open time cards by location and job for each employee.
- Adjust individual employee time cards.

## Adding or Adjusting Time Cards

You cannot add or make adjustments to a time card if the pay period has been closed.

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, and then click **Bulk Edit Time Cards**.
2. Select a location, and then click **Edit**.
3. Select an employee.
  - a. To add a new time card for the employee, update the time card form and then click **Add**.
  - b. To adjust an existing time card for the employee, select the shift from the list of time cards, update the time card form, and then click **Save**.

If you are sorting the list of time cards **By Date**, select the date, then select the employee.

4. Click **Calculate** to update the labor cost totals. If you do not click calculate, the labor totals do not reflect the updated time card information.

## Adding or Adjusting Drill-Down Time Cards for Employee Shifts

You cannot add or make adjustments to a time card if the pay period has been closed.

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, and then click **Time Cards**.
2. Select an employee, and then click **Edit**.
3. Select the time card you want to adjust and then click **Edit**, or click **Add Time Card** to create a time card for a new shift.
4. Update the form, and then click **Save**.
  - a. Select the clock-in date, clock-in time, and clock-out time.
  - b. Select the clock in and clock-out status.
  - c. Select the **Reason** that you are adjusting the time card.
  - d. Select the break period rules that applied to the shift.
  - e. Enter the amount of direct tips, indirect tips, and premium pay earned or worked by the employee during the shift.

# 7

## Work Hours and Break Periods

Labor Management enables you to define work hours and break periods such as lunch breaks and coffee breaks. After you set up work hours and break periods, you assign them to locations.

### Configuring Work Hour Restrictions

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Work Rules**.
2. Click **Add**, or select a work rule and then click **Edit**.
3. Update the minimum and maximum limits that an employee can work, and then click **Save**.

### Assigning Work Hour Restrictions and Setting Store Hours

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Location Assignment**.
2. Select the configured **Work Rules** from the drop-down to assign the work hour restrictions.
3. To share employees with a location, select a location from the **Labor Share Level** drop-down.
4. Select the day of the week that a work week begins from the **Labor Week Start Day** drop-down.
5. To override the day of the week that scheduling begins, select a day from the **Schedule Week Start Day** drop-down.
6. To override the day of the week that forecasting begins, select the day from the **Forecast Week Start Day** drop-down.
7. Select the time that the location begins a work day from the **Start Business Day Fixed Period** drop-down list.
8. To override the store work hours configuration, select the configured **Store Work Hours** from the drop-down.
9. Select the hour at which each work day begins from the **Start Labor Hour** drop-down.
10. If the store is used as a beta test site, select **Beta Store**.
11. In the **Start Labor Grace Minutes** field, define the number of minutes that an employee may clock in prior to the Start Labor Hour without allocating the time punch to the Clock-in Labor Date.

As an example, the time punch allocation method chosen in the Labor Pay Rule has been set to allocate the hours of a time punch to the clock-in labor date. The Start Labor Hour is 6:00 a.m. and the employee clocks in from 5:50 a.m. to 10:50 a.m. If the you do not define the **Start Labor Grace Minutes**, then all 5 hours are allocated to the first labor date, rather than the second labor date starting after 6:00 a.m. If you set the **Start Labor Grace Minutes** to 15, then the 5 hours worked are allocated to the second labor date starting

after 6:00 a.m. As a best practice, define a value when the allocation method in the Labor Pay Rules is set to use Clock-In Labor Dates.

12. If the Enterprise Time Clock application is installed, you can verify the version in the **Currently Installed Time Clock Version** field.
13. Click **Save**.

## Configuring Store Work Hours

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Store Work Hours**.
2. Click **Add**, and enter a name for the store hours or the name of the specific location.
3. For each day of the week, use the drop-downs to set the start time and end time, and then click **Save**.

If you leave the drop-down for minutes as **Closed**, Labor Management considers the day as closed for business.

4. You can now assign the store hours to locations.

## Assigning Store Work Hours to a Location

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Store Work Hours**.
2. Select a set of work hours, and then click **Edit**.
3. Click the **Assign to Locations** tab, select **Assign** for each location to which this set of work hours applies, and then click **Save**.

## Configuring Break Rules

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Break Rules Administration**.
2. Click **Add**, or select a break period and then click **Edit**.
3. In the **Break Duration** field, enter a duration in minutes.
4. Select **Paid Break** if employees continue to receive hourly or salary wages during the break period.
5. Select **Minor** if the break period can be used by minors.
6. Select **Make Break Paid if Less Than Break Duration** if employees can choose to take a shorter break in exchange for a paid break.
7. Enter grace period intervals for clocking in and out of the break period.
8. Select **Auto Schedule Breaks** to enable the automatic scheduler to insert the break period.
9. Select **Available for Manual Schedule** to enable managers to insert the break period when manually creating schedules.
10. Enter the minimum and maximum amount of minutes that an employee must work before they can take the break.



11. Select **Duration before Break Repeatable Pattern** to enforce the minimum and maximum amount of minutes repeatedly throughout a work day to accommodate short, repeated break periods.
12. Use the **Effective From** date editor to select the first day in which the break period becomes active. You can use the **Effective To** date editor to select a day in which the break period becomes inactive.
13. Click **Save**.

## Assigning Break Rules to Locations

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Break Rules Location Assignment**.
2. In the **Location Selection** list, select one or more locations that you want to configure.
3. On the **Rules** tab:
  - a. Click **Add Break Rule** to add a row to the list of break periods. You can then select a break period and set the time frame in which the break period is enabled.
  - b. Click **Add Minor Break Rule** to add a row to the list of break periods specific to minor-aged employees. You can then select a break period and set the time frame in which the break period is enabled.
  - c. Click **Cancel** to reset the list of break periods to the last saved configuration.
  - d. You can click **Show Inactive** to toggle showing inactive break periods.
4. On the **Config** tab:
  - a. To require employees to take a break during the scheduled time period, select **Enforce Scheduled Breaks**.
  - b. To prompt employees at the Point-of-Sale to take a break, select **Prompt for Break**.
  - c. Select the respective options for requiring management authorization for early or late clock-ins and clock-outs for paid or unpaid breaks.
5. Click **Save**.

# 8

## Overtime

Use overtime rules to require employees to work a certain number of hours and a certain number of consecutive days within a week before they are eligible for overtime pay. For example, a store that operates Monday through Sunday requires employees to work 40 hours per week and at least three consecutive days. In this case:

- An employee who works 15 hours across Monday and Tuesday and then 30 hours across Friday, Saturday, and Sunday is eligible for overtime.
- An employee who works 18 hours across Monday and Tuesday, 18 hours across Thursday and Friday, and then 10 hours on Sunday is not eligible for overtime because the employee did not work three consecutive days.

### Weighted Average Overtime

When an employee works under more than pay rate, Labor Management supports compliance with regulations requiring weighted average overtime calculations. For example, at a location configured with an overtime labor pay rule using 1.5 as the wage modifier, an employee might work the following two jobs and pay rates:

- Bartender, \$10 per hour, 10 hours
- Kitchen, \$12 per hour, 32 hours

Without factoring overtime pay, the employee would earn \$100 (10 x 10) for the bartending shifts and \$384 (12 x 32) for the kitchen shifts, for a total of \$484. Because the employee worked two hours over the weekly threshold of 40 hours, Labor Management uses the following formulas to calculate overtime pay to account for the two overtime hours:

- $\text{Total Pay} / \text{Total Hours} = \text{Weighted Average Rate}$
- $[\text{Weighted Average Rate} \times (\text{Wage Multiplier} - 1)] = \text{Overtime Rate}$

Labor Management calculates  $484 / 42 = \$11.52$  as the weighted average rate and  $[\$11.52 \times (1.5 - 1)] = \$5.76$  as the overtime rate. Multiply the overtime rate by the number of overtime hours worked to determine the overtime pay:  $5.76 \times 2 = \$11.52$ .

### Weighted Average Overtime with Tip Credit

Labor Management supports calculating weighted average overtime rates for tipped employees who work under more than one pay rate. When the location uses tip credits to deduct from the minimum wage, Labor Management uses the minimum wage to calculate the total pay to establish the overtime rate, and then Labor Management deducts the amount owed for tip credits. For example, at a location configured with an overtime labor pay rule using 1.5 as the wage modifier and in a state with a \$5.15 minimum wage, an employee might work the following two jobs and pay rates:

- Bartender, \$11 per hour, 7 hours
- Server, \$2.38 per hour, 35 hours

Without factoring overtime pay, the employee would earn \$77 (11 x 7) for the bartending shifts and \$83.30 (2.38 x 35) for the server shifts, for a total of \$160.30. Because the employee

worked two hours over the weekly threshold of 40 hours, Labor Management uses the following formulas to calculate overtime pay to account for the two overtime hours:

- $\text{Total Pay} / \text{Total Hours} = \text{Weighted Average Rate}$
- $[\text{Weighted Average Rate} \times (\text{Wage Multiplier} - 1)] = \text{Overtime Rate}$

Labor Management enforces the state minimum wage and calculates  $(5.15 \times 35) + (7 \times 11) = \$257.25$  as the total pay,  $257.25 / 42 = \$6.12$  as the weighted average rate, and  $[6.12 \times (1.5 - 1)] = \$3.06$  as the overtime rate. Multiply the overtime rate by the number of overtime hours worked to determine the overtime pay:  $3.06 \times 2 = \$6.12$ .

Deduct the tip credit amount from the total pay as shown in the following formula:

$\text{Total Pay} + \text{Overtime Pay} - \text{Tip Credit} = \text{Amount Owed}$

## Configuring Work Requirements for Overtime Eligibility

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Labor Pay Overtime Rules**.
2. Click **Add** or select a set of rules and click **Edit**.
3. In the **Overtime Multiplier** field, enter the amount by which to multiply the starting hourly wage to calculate the starting overtime wage.
4. Select an **Overtime Level** from the drop-down. Job definitions can be assigned to overtime levels.
5. To set daily thresholds for overtime eligibility:
  - a. In the **Hours Before Overtime** fields, enter the number of hours that an employee must work before being eligible for overtime pay.
  - b. In the **Hours Before Consecutive Overtime** field, enter the number of hours that an employee must work consecutively before being eligible for overtime pay.
6. To set weekly thresholds for overtime eligibility:
  - a. In the **Hours Before Overtime** fields, enter the number of hours that an employee must work before being eligible for overtime pay.
  - b. In the **Hours Before Consecutive Overtime** field, enter the number of hours that an employee must work consecutively before being eligible for overtime pay.
  - c. In the **Consecutive Days To Start Overtime** field, enter the number of days that an employee must work consecutively before being eligible for overtime pay.
  - d. In the **Days In A Week To Start Accumulated Days Overtime** field, enter the number of days that an employee must work before being eligible for overtime pay.
7. If the overtime rules apply to minors, select **Minor Rule**.
8. Use the **Effective From** date editor to select the first day in which the rule becomes active. You can use the **Effective To** date editor to select a day in which the rule becomes inactive.

## Configuring Calculations and Rules for Overtime Pay

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Labor Pay Rules**.
2. If you do not want daily overtime values to be included in weekly overtime calculations, select **Exclude Daily from Weekly Overtime**.

3. Select **Enable Weighted Average Overtime** for compliance with regulations requiring weighted overtime calculations. This option enables weighted overtime calculations for tipped and non-tipped employees.
4. If an overtime shift spanned multiple labor dates:
  - a. Select **Allocate to Clock-In Labor Date** to apply all overtime costs to the day the employee clocked in.
  - b. Select **Allocate to Actual Labor Date** to apply overtime costs to each day worked.
5. To calculate overtime on a daily basis, select **End OT Accumulated At The End of Labor Day**.
6. To calculate overtime on a weekly basis, select **End OT Accumulated At The End of Labor Week**.
7. Use the **Effective From** date editor to select the first day in which the rule becomes active. You can use the **Effective To** date editor to select a day in which the rule becomes inactive.
8. Click the **Overtime Rules** tab, and then select the applicable overtime rules.
9. Click **Save**.

# 9

## Premium Pay, Bonuses, and Deductions

Premium pay is additional pay for situations such as night shifts, holiday work, Sunday work, and standby duty. Labor Management enables you to set up premium pay by:

- **Amount:** Flat amount or percentage increase to employee pay. For example, an employee working on Christmas receives a flat increase of \$50.
- **Hours:** Pay increase based on additional hours charged at a flat rate or a set wage. For example, employees working on Christmas receive normal wages a second time for the hours worked, effectively doubling their wages.
- **Split Shift:** Compensation worth an extra hour of work or cases where an employee works more than one shift in a day. For example, some states legally require stores to compensate employees for an hour if two shifts are more than one hour apart.

You can configure flat or percentage-based additions and deductions for adjustments such as uniform fees and holiday bonuses. For example, you can configure a \$50 repair fee as a flat deduction for damaging uniforms or you can configure \$20 bonuses for winning employee of the month honors.

### Configuring a Premium Pay Rate

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Premium Pay Rules**.
2. Click **Add**, or select a rule and click **Edit**.
3. To include the premium pay in all labor cost calculations and reports, select **Include in Labor Cost**.

If you do not select this option, premium pay only shows on payroll reports.

4. To assign the premium pay to minors, select **Include Minor**.
5. To include the premium pay in all average rate calculations, select **Add To Average Rate**.
6. Enter a **Priority** for the premium pay.
7. Select whether to enable the premium pay type based on **Day of Week**, a single **Calendar Day**, or a **Calendar Day Range**.

You can then select details based on the effective date type.

8. Select the date on which the rule becomes effective from the **Effective From** date editor. Use the **Effective To** date editor to select a day in which the rule becomes inactive.
9. Select the **Minimum Duration Threshold** and **Maximum Duration Threshold** for assigning the premium pay type.

10. To configure an amount-based rate:
  - a. Click the **Type** tab, and then select **Amount**.
  - b. Select the **Start Time** and the **End Time** for the premium pay rule to be active.
  - c. To make overtime rates eligible for the premium pay, select **Rate Affected by Overtime**.

- d. To configure a flat amount, select **Flat Amount**, and then enter the amount.
  - e. To configure a percentage, select **Percentage of**, enter a percentage integer, and then select the base rate from which to calculate the percentage.
11. To configure an hours-based rate:
    - a. Click the **Type** tab, and then select **Hours**.
    - b. Select the **Start Time** and the **End Time** for the premium pay rule to be active.
    - c. In the **Additional Hours** field, enter the number of hours worth of premium rate to add.
    - d. To include the premium pay in calculating overtime wages for labor costs and reports, select **Include additional hours in overtime calculations**.
    - e. Select the pay rate for additional hours. If you select **Flat Amount**, enter the amount per hour.
  12. To configure a split-shift rate:
    - a. Click the **Type** tab, and then select **Split Shift**.
    - b. Enter the minimum and maximum hours between shifts for an employee to be eligible for compensation.
    - c. Select the **Start Time** and the **End Time** for the premium pay rule to be active.
    - d. In the **Additional Hours** field, enter the number of hours worth of premium rate to add.
    - e. To include the premium pay in calculating overtime wages for labor costs and reports, select **Include additional hours in overtime calculations**.
    - f. Select the pay rate for additional hours. If you select **Flat Amount**, enter the amount per hour.
  13. Click **Save**.

## Assigning a Premium Pay Rate by Location and by Job

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Premium Pay Rule Location Assignment**.
2. From the **Location Selection** tree, select one or more locations.
3. Select the job from the **Job Code Name** drop-down.
4. Select the premium pay type from the **Premium Pay Rule** drop-down.
5. Select the date on which the rule becomes active from the **Effective From** date editor. Use the **Effective To** date editor to select a day in which the rule becomes inactive.
6. Click **Save**.

## Assigning a Premium Pay Rate by Employee

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, and then click **Assign Premium Pay Rules to an Employee**.
2. Select an employee, and then click **Edit**.

To configure an employee who is terminated or on a leave of absence, select **Include Terminated & LOA Employees**.
3. To add a new premium pay rate for each location and job:

- a. Click **Add Premium Pay**.
  - b. Select the **Premium Pay Rule** and the active **Effective From** and **Effective To** date range, and then click **Save**.
4. To remove a premium pay rate:
    - a. Click the expand icon next to a location and job.
    - b. Click **Delete** for the premium pay rate, and then click **Save**.

## Configuring a Payroll Bonus or Deduction

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Other Pay Administration**.
2. Click **Add**, or select a bonus or deduction and then click **Edit**.
3. Select whether the bonus or deduction is a flat amount, a percentage amount, or an hourly charge from the **Type** drop-down.

If you select **Percentage**, select the total value from which the percentage amount is calculated.
4. Enter the default percentage or amount.
5. Enter a **Reference** or the bonus or deduction.
6. Enter the percentage of the bonus or deduction to be added to labor cost calculations.
7. Select the country for which the bonus or deduction is active.
8. Select whether to **Add To Payroll**, to **Deduct From Payroll**, or to not act on the amount.
9. Select **Prorate Labor Cost Across Payroll Period** to divide the amount by the number of labor cost calculations in the payroll period.
10. Select **Allow Rate Override** to enable other factors, such as overtime and premium pay, to override the amount.
11. Select **Recurring Debit/Credit** if the amount counts as a recurring debit or credit charge.
12. Select **One Per Pay Period** if the bonus or deduction recurs every pay period.
13. Use the **Effective From** date editor to select the first day in which the bonus or deduction becomes active. You can use the **Effective To** date editor to select a day in which the bonus or deduction becomes inactive.
14. Click **Save**.

## Configuring Pay Codes

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, click **Other Pay Administration**, and then click **Pay Code Definitions**.
2. Click **Add**, or select a pay code and then click **Edit**.
3. Enter a number, select whether to enable or disable the pay code, and then click **Save**.

# 10

## Tip Pools

Tip pools let organizations collect a percentage of tips from tipped employees for distribution to non-tipped employees. For example, you can set up a tip pool to collect a portion of tips from servers and distribute the money to hosts. Follow federal and state regulations for tip pools because percentages for non-tipped employees may vary. Use tip periods to define time periods in a work day for tip pool calculation. For example, if a store regularly changes staff between day and evening shifts, you can set a day and night tip period so the two periods have separate collection and distribution pools.

Tip pools have many configuration options to meet the needs of different organizational systems. An organization may have multiple tip pool profiles that can be assigned to different locations. It is also possible to use one tip pool profile for several locations.

You can configure the collection of tip pool money in one of two ways:

- **Manual:** Each day, the manager determines how much to collect from tipped staff and then enters that amount into the Manual Collection module.
- **Automatic:** Labor Management is configured to calculate the correct amount to collect and then the manager follows the collection calculations and collects the tips.

### Manual Tip Pools

Set up tip pools for manual collection so an authorized employee, such as a restaurant manager, can enter the amount to collect for the day. The tip pool profile defines the percentages for distributing tips. The system then determines an hourly wage for each job.

For example, you have three jobs that receive tip pool distributions. You configure distributions as follows:

- Bus Boys: 20 percent
- Hosts: 30 percent
- Bartenders: 50 percent

If you entered a tip pool amount of \$75.00 for the day, the amount per job based on the percentages would be:

- Bus Boys: \$15.00
- Hosts: \$22.50
- Bartenders: \$37.50

The system calculates the hourly tip rate based on the total hours worked for the job:

- If bus boys worked 30 hours that day, the hourly rate of tips is \$0.50.
- If hosts worked 25 hours, the hourly rate of tips is \$0.90.
- If bartenders worked 10 hours, the hourly rate of tips is \$3.75.

The system applies the hourly rates to each employee's hours worked. A bartender who worked a 5-hour shift earns \$18.75 in tips.



If one or more jobs do not have hours logged for the specific business day or tip period, the tip pool is distributed proportionally among the jobs that had hours logged. For example, if the bar is closed for a day, the system maintains the proportions and distributes the tip pool as 40 percent to bus boys and 60 percent to hosts.

## Configuring Manual Tip Pooling

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Tip Pool Profile**.
2. Click **Add**, or select a tip pool profile and then click **Edit**.
3. In the **Distribution Method** drop-down list, select whether to distribute from the tip pool by cash or directly in a paycheck.
  - If you select **Cash**, then Labor Management calculates how tips are divided amongst the staff and then the manager is responsible for physically distributing the cash tips to employees. The distribution amount will not be recalculated if changes are made to time records for previous days.
  - If you select **Paycheck**, then Labor Management calculates how tips are divided amongst the staff and the tips are included in their paycheck or another non-cash payment. The distribution amount will be recalculated if changes are made to any time records in the current pay period.

### Note:

You can eliminate the need to add tips to time cards individually by using the **Paycheck** option in conjunction with the **Post Indirect Tip to Time Card** setting.

4. Select **Post Indirect Tip To Timecard** to post the amount distributed through the tip pool as an indirect tip to employee timecards.
5. To implement tip periods:
  - a. Select **Enable Tip Period**.
  - b. Under **Tip Period Configuration**, enable and set a duration in hours for up to four tip periods. The durations must total 24 hours.
6. Select **Manual Collection**.
7. For each job that accepts indirect tips, enter the **Percentage** of the tip pool that each job receives.
8. Use the **Effective From** date editor to select the first day in which the profile becomes active. You can use the **Effective To** date editor to select a day in which the profile becomes inactive.
9. Click **Save**.

## Entering a Manual Tip Pool Amount

Perform these steps when using a tip pool profile configured for manual collection. Amounts entered in this module may only be edited if the distribution method is **Paycheck** and the pay period is open.

Cash distribution may be edited on the same day the cash totals were entered, as long as the End of Day has not run yet. When an entry is changed, the system will recalculate the distribution and save it to the employees' records.

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, and then click **Manual Tip Pool Allocation**.
2. Select the location, and then click **Edit**.
3. For each day and tip period, enter the tip pool amount to be distributed based on the tip pool profile, and then click **Save**.

## Automatic Tip Pools

You can configure tip pools for automatic collection so the system calculates the amount that the manager should collect for the day based on percentage of tip and type of sales total.

For example, you have three jobs that accept indirect tips. You configure the tip pool as follows:

- Bus Boys: 5 percent of Net Sales
- Hosts: 3 percent of Revenue Center Net Sales
- Bartenders: 8 percent of Beer, Wine, and Liquor Gross Sales

The system then calculates the distributed amount based on the respective sales totals.

## Configuring Automatic Tip Pooling

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Tip Pool Profile**.
2. Click **Add**, or select a tip pool profile and then click **Edit**.
3. Enter a name and a description for the tip pool profile.
4. In the **Distribution Method** drop-down list, select whether to distribute from the tip pool by cash or directly in a paycheck.
5. Select **Post Indirect Tip To Timecard** to post the amount distributed through the tip pool as an indirect tip to employee timecards.
6. If the tip pool profile must account for work periods when tip pools are not collected:
  - a. Select **Enable Tip Period**.
  - b. Under **Tip Period Configuration**, enable and set a duration in hours for up to four tip periods. The durations must total 24 hours.
7. Select **Automatic Collection**.
8. For each job that accepts indirect tips:
  - a. In the **Sales Method** drop-down list, select the total sales value from which to calculate the percentage.
  - b. Enter the **Percentage** of the total sales value that the job receives.
  - c. Select the revenue center, major item group, or order type to which the selected total sales value applies.
9. Use the **Effective From** date editor to select the first day in which the profile becomes active. You can use the **Effective To** date editor to select a day in which the profile becomes inactive.
10. Click **Save**.

# 11

## Jobs

Labor Management enables you to define jobs for tracking labor activity for employees by work category. When you define a job, you associate it with a job category, labor category, and a revenue center.

Job categories let you group jobs for reporting and scheduling. For example, you can create a job category named Kitchen Staff for dishwashers and cooks. Use labor categories for reporting on hours worked for a specific job. For example, create a labor category for tipped employees and a labor category for non-tipped employees. After you define the job, you set it as salaried or hourly and then define rate details.

### Adding a Job Category

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Job Category Master**.
2. Click **Add**, enter a name, and then click **Save**. Depending on permissions, you can configure the following options:
  - a. **Report**: The job category can be used for reporting.
  - b. **Active**: The job category is active.
  - c. **Enterprise Managed**: The category is controlled by Enterprise Management. If this option is enabled, you cannot see or configure the job category when configuring master items.

Labor Management automatically assigns a **POS Reference** number.

### Adding a Labor Category

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Labor Category Master**.
2. Click **Add**, enter a name, and then click **Save**. Depending on permissions, you can configure the following options:
  - a. **Report**: The labor category can be used for reporting.
  - b. **Active**: The labor category is active.
  - c. **Enterprise Managed**: The category is controlled by Enterprise Management. If this option is enabled, you cannot see or configure the labor category when configuring master items.

Labor Management automatically assigns a **POS Reference** number.

### Creating a Job

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Job Definitions**.
2. Click **Add**, click the **General** tab, and then update the form:

- a. Select the **Job Category** and the **Labor Category** to which the job belongs.
  - b. Select an **Overriding Employee Class** to override employee normal privileges when working this job.

For example, if the assistant manager for a restaurant is off on Monday evenings and the restaurant appoints the head waiter to work as the assistant manager on those nights, by default, the head waiter does not have the correct privileges even if they clock in as an assistant manager. If the restaurant sets the **Overriding Employee Class** to grant assistant manager privileges for the assistant manager job, Labor Management overrides the head waiter's privileges with assistant manager privileges.
  - c. Select the **Revenue Center** for the job. Labor Management does not let you link jobs to higher levels.
  - d. Select the **Clock-In Privilege** level that an employee must have to be able to clock in for this position.

You can assign the clock-in privilege level for an employee in Oracle MICROS Reporting and Analytics Employee Configuration.
  - e. Enter a minimum age requirement for the job. Labor Management enforces the minimum age and prevents assigning the job to younger employees.
  - f. **Declare direct tips on clock out** and **Declare indirect tips on clock out**: Select to require employees to declare direct and indirect tips when clocking out.
  - g. **Allow early or late clock out**: Select to enable employees to clock out early or late. This option overrides the employee class setting.
  - h. **Print tips declared on clock out**: Select to print declared tips when an employee clocks out.
  - i. **Tipped Job**: Select if tip credits apply for the job.
  - j. Enter the **External Reference** from the Point-of-Sale application.
  - k. Select an **Employee Role**.
3. Click the **Type** tab to specify the wage type and if applicable the rates:
    - a. Select whether the job is paid **Hourly** or **Salaried**.
    - b. Select the first day that the job can be assigned.
    - c. Select the **Overtime Levels** that can be assigned to this job.
    - d. If the job is paid hourly, enter the regular and overtime pay rates and restrictions.

## Assigning a Job to a Location

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Job Definitions**.
2. Select a job, and then click **Assign to Locations**.
3. In the **Location Selection** menu, select every location to which you want to assign the job.
4. Fill out the form to override any default wage configurations, and then click **Save**.

You can only enter one set of override values to all locations.

# 12

## Employee Management

Configuring Labor Management for Human Resources consists of the following high-level steps:

- Configuring organization settings, such as employee skill levels, working hours, and legal compliance.  
You configure these settings after installing Labor Management. You update these settings as necessary to satisfy changing business requirements. In enterprise organizations, you assign the configurations to the locations.
- Configuring the employee information form to control viewing and editing permissions for employee records.  
You apply permissions to roles. You can also enable change tracking for auditing.
- Configuring and maintaining jobs, wages, pay rates, and employee job assignments.  
You set up job and labor categories to improve the accuracy and focus of wage- and job-related reports.

### Organization Settings

You set up initial organization settings to set guidelines and restrictions on subsequent configurations. These settings include:

- Ethnicity
- Employee skill levels
- School districts
- School year calendars and vacation days
- Direct deposit banks
- Store work hours
- Reasons for change

You typically do not have to change these settings after you first define them.

### Employee Information

You configure the employee information form using the Human Resources templates to:

- Streamline the information available for viewing and editing.
- Add role-based permissions for viewing and editing the form.
- Employee create, edit, and assignment permissions by role.
- Configure the audit trail for changes to employee information.

### Jobs, Wages, and Pay Rates

You configure settings for:

- The list of available jobs.

- Wages and pay rates.
- Job and labor categories for improved reporting data.

## Employee Home Locations and Away Locations

When you add an employee, the user must assign the employee to a location. The system handles the assignment as the home location for the employee. If an employee works at another location, you can assign them to the other location, known as an away store. You must also assign the employee to a job at the away store. This ensures that the employee will be scheduled to work at one store at a time and prevents double booking.

1. Depending on which release number you have, follow one of these options:
  - If your release number is 20.1.14 or earlier, in Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Employee**, and then click **General**.
  - If your release number is 20.1.15 or later, in Reporting and Analytics, click the side navigation menu, click **People**, click the person, click **Manage Employment Information**, and then click **Location Configuration**.
2. Click **Assign Employee to Another Store**, select the store, and then click **Assign**.
3. Click **Save**.

## Human Resources Templates and Permissions

You can configure human resources templates to:

- Control viewing and editing permissions for entering and updating employee information.
- Create pre-set values and guidelines for employees by location.
- Create and configure custom fields for additional information.

For example, you can configure a template for Store Managers, who typically do not need to see or edit every available field.

You can further configure the template by hiding the necessary fields. While an administrative Human Resources employee can view all the available fields, a Store Manager might only need to view and configure basic information. You can then hide fields such as Prefix and Suffix, hide region-specific options, and hide detailed address information to only show basic contact information.

## Assigning Human Resources Templates to Roles

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Template Assignment**.
2. For each role, select a template for the following columns:

The list of roles shown in this configuration screen depend on the **Can Be Assigned in HR Form** role permission.

  - a. Home Store Template: the template to use when creating an employee record at an assigned location.

- b. Away Store Template: the template to use when creating an employee record while working as a visitor.
- c. Home Store Edit Template: the template to use when editing an employee record at an assigned location.
- d. Away Store Edit Template: the template to use when editing an employee record while working as a visitor.

## Configuring Access to Employee Classes by Role

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Access Employee Classes**.
2. Select a role, and then click **Configure**.
3. Select the employee classes for which this role can add, edit, and assign employees, and then click **Save**.

For example, if you grant a Shift Manager role privileges to all employee classes other than the General Manager and the Property Expert, the Shift Manager can:

- Create a new employee entry.
- View and edit the employee details of a bartender.
- Assign a new employee to the cashier class.

But the Shift Manager cannot view, edit, or assign employees to the General Manager or Property Expert class.

## Employee Information Change Records

You can configure Employee Change Tracking rules to monitor changes made to specific information in employee data. You can then generate the Employee Change Tracking Report to view a log of changes containing details about the change, the date and time of the change, and the user who made the change.

For example, if the organization tracks changes to First Name and Last Name, you can run the Employee Change Tracking Report to see all cases of an employee name being changed. You can use this information to correct errors and to audit attempts at fraud.

Employee Change Tracking configurations can be in the following states:

- Active: The Tracking configuration has tracked at least one modification within a specified activity time frame.
- Inactive: The Tracking configuration has tracked at least one modification but has not tracked a modification within a specified activity time frame.
- Deletable: The Tracking configuration has not tracked a modification and can be deleted.

## Configuring Employee Change Tracking

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Employee Change Tracking**.
2. For each data field you want to track:
  - a. Click **Add**, and then enter an identifier name.
  - b. Select the **Table** and then the corresponding **Field Name**, and then click **Save**.

You can configure tracking for employee information detail fields, payroll wage fields, and for data from the Point-of-Sale application.

## Importing Employee Information from a Microsoft Excel Spreadsheet

If you are transferring employee information from a Point-of-Sale application, you can enter employee data into a provided Microsoft Excel spreadsheet, and then import the spreadsheet to perform a bulk entry of employee data. This method only enters basic account and personal data and does not function as an alternative for entering employee data through the employee administration interface.

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, and then click **Enterprise Employee Interface**.
2. Right-click **Enterprise Employee Worksheet**, and save the file to your local drive.

If your enterprise has some locations that use timekeeping and some that do not, the locations that do not use it should download the **Hybrid Labor Enterprise Employee Worksheet**. The locations that use timekeeping should use the standard **Enterprise Employee Worksheet**.

3. Follow the instructions in the Microsoft Excel spreadsheet to populate a list of employee information, job and pay rate information, and Point-of-Sale application account information, and then save the file.

If you are using this method to update information for existing employees, click the **Options** tab, and then change the **Execution Mode** value to 2.

4. Click **Choose File**, select the spreadsheet, and then click **OK**.
5. Click **Import**, and then wait for the confirmation screen to verify the import processed without errors.
6. Depending on which release number you have, follow one of these options:
  - If your release number is 20.1.14 or earlier, in Reporting and Analytics, click **Labor**, click **Employee Administration**, and then click **Employee**.
  - If your release number is 20.1.15, in Reporting and Analytics, click **People**.
7. Verify all imported employees, and update information for all employees as required by system configurations.

## Including Salaried Employees in Labor Cost Calculations

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Payroll Preprocessing**, click **Admin**, and then click **Labor Pay Rules**.
2. Select **Include Salaried Employees in Labor Costs** to include wages paid to salaried employees in Labor Cost reports.
3. Select **Allocate Salaried Labor To Defined Salary Week** to allocate an employee's salary equally for each salary week or the store.
4. Select **Allocate Salaried Labor To Actual Clock in or Schedule Days** to allocate an employee's salary for each hour the employee is clocked in to work. The hourly amount adjusts as the employee clocks additional hours or as the employee is scheduled for more hours.



5. Select **Allocate Salaried Labor To Defined Pay Period**. This determines the labor cost per 15 minute fixed period interval for each calendar month based on the store work hours and the employee's salary. This method has no rounding differences and generates salaried labor cost even on the days that no salaried employees have clocked in.
6. Enter the **Number of Hours in Salaried Labor Week** to define the work hours used by labor calculations when incorporating salaried labor.
7. Use the **Effective From** date editor to select the first day in which the rule becomes active. You can use the **Effective To** date editor to select a day in which the rule becomes inactive.
8. Click **Save**.

## Adding an Ethnicity

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Ethnicity**.
2. Click **Add**, enter the name, suffix, and sorting order for the ethnicity, and then click **Save**.

## Adding Skill Levels

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Skill Level**.
2. Click **Add**, update the form, and then click **Save**.
  - a. Enter an integer between 1 and 10 for the **Skill Level**, where 10 is the least proficient and 1 is an expert.
  - b. Enter an integer for **Skill Level Value** to quantify the skill level, with higher skill levels corresponding to higher skill level values.

For example, you can define three skill levels Expert, Intermediate, and Newbie. The values would be as follows:

**Table 12-1 Example Skill Level Definitions**

Name	Skill Level	Skill Level Value
Expert	1	100
Intermediate	2	75
Newbie	3	50

## Adding a School District

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **School District**.
2. Click **Add**, update the school district name and location, and then click **Save**.
3. You can now assign the school district to a location, and configure the school year and vacation days for the district.

## Assigning a School District to a Location

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **School District**.
2. Select the school district you created, and then click **Edit**.
3. Click the **Assign to Locations** tab, select **Assign** for each location to which this school district applies, and then click **Save**.
4. You can now configure the school year and vacation days for the district.

## Configuring a School Year and Vacation Days

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **School District**.
2. Select a school district, click **Edit**, and then click the **School District Calendars** tab.
3. Click **Add**, configure the general parameters for the school year, and then click **Save**.
  - a. Select the start and end dates for the school year.
  - b. Select the start and end times for a standard school day.
  - c. Select the days of the week in a standard school week.
4. Select the school year, click **Edit**, and then click the **Vacation Days** tab.
5. Add each vacation day or period, and then click **Save**.
  - a. Click **Add**, and then enter a name.
  - b. Select the start and end dates and times for the vacation day or period, and then click **Save**.

## Adding a Direct Deposit Bank

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Payroll Bank**.
2. Click **Add**, update the form, and then click **Save**.
  - a. Enter the address for the bank.
  - b. If applicable, enter a **Building Society Roll Number**.
  - c. Enter any information that Human Resources employees might need in the **Alpha-Numeric Field**.
3. You can now assign the bank to a location.

## Assigning a Direct Deposit Bank to a Location

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Payroll Bank**.
2. Select a bank, and then click **Edit**.
3. Click the **Assign to Locations** tab, select **Assign** for each location to which this bank applies, and then click **Save**.

## Employee Maintenance

You can create and maintain a database of employees containing the following sets of information:

- Personal Information
- Contact Information
- I9 Employment Eligibility
- Tax Exemptions
- Payroll Information
- Employment Status
- Position and Pay

You can search the database, retrieve a list of contact information, and create employee templates for a quicker hiring process.

## Adding Employees

Employees are added through Reporting and Analytics. See [People Management \(20.1.15\)](#) in the *Oracle MICROS Reporting and Analytics User Guide* for instructions.

## Point-of-Sale Account Configuration

1. Depending on which release number you have, follow one of these options:
  - If your release number is 20.1.14 or earlier, in Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Employee**, and then click **General**.
  - If your release number is 20.1.15 or later, in Reporting and Analytics, click the side navigation menu, click **People**, click the person, click **Manage Employment Information**, and then click **Location Configuration**.
2. Select a location from the **Filter by Location** list, and then click the **POS Configuration** tab.
3. Update information for the Point-of-Sale (POS) application account at the location, and then click **Update List**.
  - a. Enter and confirm the password for the POS Application and the PC Application.
  - b. Select the **Employee Class** and **Back Office Class** for the employee. The drop-downs are populated by the POS applications.
  - c. Select the **Employee Privilege** to assign to the employee at the POS application. The drop-down list is populated by the Employee Privilege Administration configurations.
  - d. Select whether the employee needs **Cashier** access, and specify the **Cash Drawer Id** and the **LDS ID** (Liquor Dispensing) to which the employee needs access.
  - e. In the **Password** field, enter the POS login password for the employee.

If Oracle MICROS RES 3700 is linked to Labor Management, you can click **Generate Password** to send an automatically-generated password to the employee's email address. This lets the employee set a new password.

- f. Select **User Account Disabled** to disable the POS account.
- g. Select **In Training** to designate the account as a training account.
- h. To assign a magnetic card to the employee, swipe the card through an attached and configured magnetic card reader. The reader automatically populates the **Magnetic Card Number** field with the number encoded on the back of the card.
- i. You can then specify an HTML page to associate with the employee's login, and any additional alphabet and numeric information to be appended to the employee's POS account information.

## Configuring the Non-Labor Template for Hybrid Labor Setups

You can configure your enterprise to use a hybrid model of Labor Management, with some locations using it and other locations that use third party applications for time tracking. Follow the instructions below to configure employees working at a location that does not use Labor Management.

### Set up

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, click **Admin**, and then click **Organization Configuration**.
2. Select **Enable the Non-labor HR Template** and then click **Save**.

#### Note:

To see the **Enable the Non-labor HR Template** option:

- a. There must be a labor category and a job category. See [Adding a Labor Category](#) and [Adding a Job Category](#) for more details.
- b. Then assign a template to the person's role. See [Assigning Human Resources Templates to Roles](#) for more details.

3. In Reporting and Analytics, click **Configuration**, and then click **Portal Admin**.
4. Edit the location or locations that are not using Labor Management features and confirm that **Enable Enterprise Labor** is deselected.
5. Click **Save**.

### Onboard Employee

1. In Reporting and Analytics, click **Labor**, click **Human Resources**, and then click **Employees**.
2. Click **Add**.
3. Enter the employee **First Name**, **Last Name**, and select their **Date of Birth**.
4. (Optional) Select the **Employee Role** and **Employee Level**.
5. Click **Status** and then enter the employee's **Hire Date**.
6. Click **Location Configuration** and select the **Employee Class** and the **Job Code Name**.
7. Click **Save**.
8. Proceed to the workstation and assign an Employee ID.

The employee can now sign in and perform check functions without the need to clock in or out. If the employee needs to be assigned to additional locations or auto-generated jobs, that can be done from the **Location Configuration** tab.

# 13

## Scheduling

Labor Management uses schedule profiles to control schedule appearance and settings at a location. Labor Management can create schedules based on staffing requirements generated from forecast and sales data or you can create schedules. To set up Labor Management to create the schedules, configure the schedule profile for auto-scheduling. After Labor Management creates schedules, authorized employees can edit the schedules.

Scheduling requirements can vary by organization. In most cases, setting up scheduling consists of the following high-level steps:

1. Verifying your environment has the following portlets and their privileges have been configured:

- Scheduling - Schedule
- Scheduling - Admin
- Staffing - Profile

The *Oracle MICROS Reporting and Analytics User Guide* provides more information on adding portlets.

2. Adding stations and skill levels (optional).
3. Configuring reason codes for blackout periods.

A blackout period is a time period during which employees cannot switch shifts or request time off. For example, you can configure a holiday weekend as a blackout period. Employees receive an error when they try to switch shifts or request time off during a blackout period.

4. Configuring break rules and assigning them to locations.
5. Creating stations and assigning them to the organization level.
6. Creating schedule profiles.
7. Configuring schedule edit restrictions.

Schedule edit restrictions enable you to control schedule changes that result in labor cost increases.

8. Assigning staffing profiles to the organization level.

## Employee Work Hours and Availability

Labor Management lets authorized employees set, incorporate, and override an employee's availability for schedules and for manual shift assignments. For example, you can configure the work hour rules and availability settings for a part-time employee who has time commitments for classes.

The employee-specific work hour rules are configured so the employee must work at least 20 hours in a week but is only required to work Monday, Wednesday, and Friday per an agreement to accommodate classes on Tuesday and Thursday.

**Table 13-1 Employee Work Hour Rules**

Day of the Week	Minimum Hours	Maximum Hours
Week	20	40
Sunday	0	8
Monday	4	8
Tuesday	0	8
Wednesday	4	8
Thursday	0	8
Friday	4	8
Saturday	0	8

The employee availability settings are configured to specify unavailability on Tuesday and Thursday to account for classes, preferred times on Monday, Wednesday, and Friday, and on-call status on weekends.

**Table 13-2 Employee Availability Settings**

Time Segment	All Day Event	Start Day of Week	Start Time	End Day of Week	End Time
Preferred	No	Monday	10:00 AM	Monday	4:00 PM
Preferred	No	Wednesday	10:00 AM	Wednesday	4:00 PM
Preferred	No	Friday	10:00 AM	Friday	4:00 PM
Unavailable	Yes	Tuesday	12:00 AM	Tuesday	11:45 PM
Unavailable	Yes	Thursday	12:00 AM	Thursday	11:45 PM
On Call	No	Saturday	12:00 PM	Saturday	9:00 PM
On Call	No	Sunday	12:00 PM	Sunday	9:00 PM

Depending on the schedule profile, the forecast and automated schedule generator can take the preferred, unavailable, and on-call time segments as feedback for generating shifts and shift assignments. For example, during a week forecasted with a busy weekend, the system can schedule the employee to help with 3 hours on Saturday and on Sunday to account for the extra staffing needs.

## Schedule Approval Process

Labor Management includes a review and approval process for schedules. Each schedule profile includes the ability to configure approval and automatic approval settings.

### Blank

The schedule for a labor period begins without an approval status and can be generated, edited, and saved by any authorized employee.

When an authorized employee clicks **Submit** in a schedule editor:

- If automatic approval is not enabled, the approval status changes to *Pending*.
- If automatic approval is enabled, the approval status changes to *Approved* or *Rejected*.

### Pending

A schedule in the `Pending` state cannot be changed.

Authorized employees can change the status to `Approved` or `Rejected`.

### Rejected

The system does not implement a schedule in the `Rejected` state. Authorized employees can edit, save, and submit a rejected schedule.

### Approved

A schedule in the `Approved` state cannot be changed, and the system implements and enforces the shifts in an approved schedule. Authorized employees can then:

- Send the schedule by email.
- Make changes to the schedule, and then click **Publish** to submit the changed schedule for review. The system continues to enforce the approved schedule.

## Creating Schedule Profiles

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Scheduling - Admin**, and then click **Schedule Profiles**.
2. Click **Add**.
3. On the **Scheduling Configuration** tab, configure schedule properties.
4. On the **Color Code Themes** tab, assign colors to job and employee status.  
Apply colors to job and employee status to differentiate between statuses when working with the schedule editor.
5. On the **Blackout Period** tab, configure blackout periods.
6. On the **Schedule Place Holder** tab, configure schedule placeholders.

After you create schedule profiles, you assign them to locations.

## Configuring Schedule Profile Properties

1. Click the **Scheduling Configuration** tab.
2. To use forecast and sales data from Oracle MICROS Forecasting and Budget to generate staffing requirements for scheduling, select **Enable Auto Scheduling**.
3. To use shift pools, select **Enable Shift Pool**.  
If an employee cannot work a scheduled shift, the employee can add the shift to a pool so another employee can pick up the shift.
4. In the **Max Number of Time off Requests a day** field, enter the maximum number of requests per employee that the scheduler accommodates.
5. Configure the following schedule exceptions, or situations where the schedule requires additional adjustments:



**Table 13-3 Schedule Exceptions**

Field	Description
Enable overlapping shifts	Select <b>Manual</b> to allow configuring hours with more than one shift. For example, you can configure a 10 AM to 4 PM lunch shift, and a 3 PM to 10 PM dinner shift.
Enable 'On call' employees if requirements are not fulfilled	Select <b>Manual</b> to allow scheduling On Call employees, or employees that are available to fill spots in the schedule when needed.
Enable 'Not Available' employees if requirements are not fulfilled	Select <b>Manual</b> to allow scheduling employees set as unavailable to fill spots in the schedule. Select <b>Exclude Minors</b> if this option should continue to enforce unavailability for minor-aged employees.
Enable 'Overtime' employees	Select <b>Manual</b> to allow scheduling employees even if they would be paid overtime wages.
Enable placeholders to be allocated to the shifts	Select <b>Manual</b> to allow creating and scheduling placeholder employees to indicate that additional resources are required.

6. Configure the following scheduling parameters, or options that can be enforced for automatic generation or manual configuration:

**Table 13-4 Other Scheduling Parameters**

Field	Description
Enable schedule breaks	Select how the schedule incorporates break period configurations into the schedule.
Enable break costs	Select <b>Manual</b> to allow payroll calculations to incorporate the cost of scheduled breaks.
Enable skill levels	Select how the schedule incorporates skill level requirements and the configured skill level of each employee.
Apply Set Schedule	Select <b>Auto</b> to automatically generate a set schedule every week.
Prohibit scheduling of shifts greater than max hours of employee	Select <b>Manual</b> if you do not want to enforce the maximum work hours configured for the employee or location's labor rules. Select <b>Exclude Minors</b> to enforce the maximum work hours for minor-aged employees.
Prohibit scheduling of shifts less than min hours of employee	Select <b>Manual</b> if you do not want to enforce the minimum work hours configured for the employee or location's labor rules. Select <b>Exclude Minors</b> to enforce the minimum work hours for minor-aged employees. Select <b>Suppress the warning messages for min weekly/monthly hours</b> if you do not want Labor Management to show a warning when employees do not meet the minimum hour requirement.

**Table 13-4 (Cont.) Other Scheduling Parameters**

Field	Description
Enforce Labor Scheduled Percent	If your environment includes Oracle MICROS Forecasting and Budget and you want to enforce flexible hour percentages, select <b>Manual</b> , and then enter the percentage you want to enforce. The system calculates the Forecast Sales values and enforces the value when you manually create or configure a schedule.

7. If you enabled automatically generating schedules, configure the criteria considerations:

**Table 13-5 Scheduling Criteria Considerations**

Field	Description
Best cost	Select whether to use the lowest possible labor cost among the available options. For example, if a site can choose between scheduling a cashier that makes \$6.15 an hour and a cashier that makes \$7.00 an hour, the automatic scheduler selects the cashier that makes \$6.15 an hour if all other considerations are equal.
Back to back shifts	Select whether an employee can be scheduled for more than one consecutive shifts. Select <b>Exclude Minors</b> to exclude minor-aged employees from being scheduled for back-to-back shifts.
Employee maximum minimum hours	Select whether to enforce maximum weekly hours, maximum daily hours, and minimum daily hours. Select <b>Exclude Minors</b> if the threshold does not apply to minor-aged employees.
Set auto schedule length	Select whether to use the same length in hours for every shift. If you select <b>Yes</b> , enter the shift length in the <b>Auto Schedule Length (Hours)</b> field.
Percentage of 'Time off' requests over the past period	Select whether to maintain the same percentage of accepted time off requests as the previous schedule period.
Percentage of 'Switch Shift' requests over the past period	Select whether to maintain the same percentage of shift switch requests as the previous schedule period.
Schedule 'On Call' employees	Select whether to allow the scheduling of On Call employees, or employees that are available to fill spots in the schedule when needed.
Schedule 'Preferred' employees	Select whether to account for the <b>Preferred</b> setting for employees.
Schedule 'Unavailable' employees	Select whether to allow the scheduling of employees who have been set as unavailable to fill spots in the schedule.

**Table 13-5 (Cont.) Scheduling Criteria Considerations**

Field	Description
Day of week to begin auto schedule	Select the day of the week to begin automated schedules, such as Monday.

8. If you want schedules created using this profile to automatically publish without requiring review and approval, select **Schedule does not require approval**.
9. To automatically approve the schedule once the schedule hits a certain time period before the start of the scheduled week, select **Auto Approval**. You can then enter the **Number of Hours before the new schedule week begins**.  
  
For example, if the scheduled weeks for a store begin on Monday, and you select this option and enter two, the schedule remains open and editable through the end of Friday. On Saturday, the schedule closes, generates, and is implemented for the schedule week. You can use this to implement a hard deadline for schedule changes or to implement a soft review and change process.
10. To turn off labor cost calculations using the Labor Management API, select **Disable Labor Cost Calculation (Scheduler API)**.
11. To send the schedule by email when it is generated, enter an **Email Address**.

## Configuring Blackout Periods

1. Click the **Blackout Period** tab.
2. Click **Add**, or select a blackout period, and then click **Edit**.
3. To configure a regular blackout period:
  - a. Select **Blackout Period**.
  - b. Select a **Reason for Blackout**.  
  
Your administrator adds the blackout reason codes when setting up Labor Management.
  - c. To set the blackout period only or a specific time range, enter start and end times for the blackout period. For example, if you enter 10 AM to 2 PM, employees can still request unavailability for the selected date range as long as they request times outside of the entered time range.  
  
If you want the blackout period to encompass the whole day for the selected date range, select **All Day Event**.
  - d. Select start and end dates for the blackout period. You can then select whether the blackout period affects **Selected Days of the Week** within the selected date range, **All Days** within the selected date range, or only **Selected Days of Month** within the selected date range.
  - e. Click **Update List**.
4. To configure a blackout period deadline before a new scheduled week:
  - a. Select **Days before start of scheduled week**.
  - b. Select a start and end date for the blackout deadline rule.
  - c. In the **Days before start of scheduled week** field, enter the number of days after which employees cannot request unavailability.
  - d. Click **Update List**.

## Color-Coding Job Types and Employee Status

When you create the schedule profile, you can assign color codes to job types and employee status.

1. Click the **Color Code Themes** tab.
2. For each job type, open the color picker, and then select the color.
3. Click the **Legend** tab.
4. For each employee status, open the color picker, and then select the color.

## Configuring Staffing Placeholders

A placeholder is a visual indicator on a schedule that shows where you need employees to satisfy staffing requirements.

1. Click the **Schedule Place Holder** tab.
2. Click **Add**, or select a placeholder and then click **Edit**.
3. Update or select resource detail information, and then click **Update List**:
  - a. Select the **Job Category** and **Job** that the placeholder indicates as required.
  - b. Enter the pay **Rate** for the job.

## Configuring Schedule Edit Restrictions

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Scheduling - Admin**, and then click **Schedule Edit Restrictions**.
2. Specify restriction percentages for the roles that can edit schedules.

The percentage is a limit on the change in labor cost associated with schedule changes. Labor Management does not let role members make schedule changes that result in labor cost increases over the specified percentage.
3. Click **Save**.

## Configuring Employee Work Hours and Availability

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Human Resources**, and then click **Employee Availability**.
2. Select the employee, and then click **Edit**.
3. In the **Employee Work Rules** section, enter the minimum and maximum hours that the employee can work per week and per day.
4. To add an availability setting:
  - a. In the **Employee Availability** section, click **Add**.
  - b. In the **Time Segment** drop-down, select whether to create an unavailability period, a period where the employee is available for on-call scheduling, and a preferred time period for scheduling.
  - c. Select the start and end day of the week for the segment. Labor Management automatically repeats the rule every week until you delete or modify the rule.

- d. Select the start and end times for the segment, or select **All Day Event** to designate the entirety of each day included in the segment.
- e. Click **Save**.

You can now view employee availability intervals in the schedule editors. You can override availability intervals based on schedule configurations.

## Creating Schedules

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Scheduling - Schedule**, and then click **Basic Schedule Editor**.
2. Select the location, and then click **Edit**.
3. To zoom in on a day, double-click the day in the editor.
4. To copy a schedule from the previous week, click **Copy Previous**. This operation fails if a valid schedule was not submitted or generated for the previous week.
5. To copy a schedule from another week, click **Copy Other Week**. The operation fails if a valid schedule was not submitted or generated for the selected week.
6. To filter schedule data from the **Filters** pane, select a job category, job, or availability status.
7. Click **Shifts**, and then select one of the following methods to add a shift:
  - To add a fixed-length shift, drag a time block (for example, **7 hr**) to the employee row in the schedule editor.
  - To add a custom-length shift, place the cursor in the employee row, and then drag the cursor to define the start and end times.
  - To move a shift to another employee, drag the shift to the new employee.
  - To move all shifts from one employee to another employee, right-click the name of the current employee, select **Assign To**, and then select the new employee.
8. To edit a shift:
  - Drag the cursor to adjust the start time or end time.
  - Right-click the shift, and then click **Edit**.

## Editing Schedules

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Scheduling - Schedule**, and then click **Basic Schedule Editor**.
2. Select the location, and then click **Edit**.
3. To zoom in on a day, double-click the day in the editor.
4. To edit only the shift start and end times, drag the shift block start and end points to the new times.
5. To edit more shift details:
  - a. Right-click the shift block, and then click **Edit**.
  - b. Edit the shift details, and then click **Save**.

## Submitting Schedules

1. Click **Calculate** to update labor cost calculations. The schedule editor updates total hours in real time, but does not calculate and update labor cost until you click **Calculate**.
2. Click the **Summary** tab to view the labor costs for the week.
3. Click an employee name to view a summary of their assigned shifts.
4. Click the **Schedule Notes** tab and enter notes, considerations, or messages about the schedule.
5. Click **Save** to check for schedule warnings and violations, and to save changes to the schedule. You can save the schedule with warnings, but you must resolve violations before you can save.
6. Click the **Violation/Warning** tab to review warnings and violations.

Warnings include scheduling employees outside of store work hours, and scheduling employees beyond their minimum or maximum work hours.

Violations include scheduling employees on Leave of Absence, or scheduling employees with approved Time Off requests.
7. Click **Submit** to finalize a saved schedule and begin the schedule review and approval process. Submitted schedules cannot be changed without requiring approval.

If you made changes to an approved schedule, click **Publish** to submit the changes for approval.

## Approving Schedules

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Scheduling - Schedule**, and then click **Schedule Approval/Rejection**.
2. Enter the parameters for filtering the overview, and then click **Display**:
  - a. Select the **Date** that you want to view. The **Schedule Approval/Rejection** page shows the selected date and the following six days. The page does not use labor weeks or financial weeks.
  - b. Select the approval **Status** that you want to view.
3. You can view a configured schedule by clicking **Basic** or **Advanced** in the **View Schedule** column, depending on the schedule editor(s) used in creating and configuring the schedule. The schedule editor opens for the selected location and labor week.
4. To change the approval status of a schedule, select the new status from the drop-down list in the **Status** column, and then click **Save**.

## Printing Schedules

1. Click **Print** from the menu bar.
2. Select whether to order the schedule **By Job** or **By Employee**.

For example, if you select **By Job**, each row of the table corresponds to a job, and each row includes a list of employees and shifts. If you select **By Employee**, each row of the table corresponds to an employee, and each row includes a list of jobs and shifts.
3. Select to **Show End Times** for each shift. If you do not select this option, the printed schedules only include the start times for each shift.

4. Select a **Job Code** or **Job Category** from the drop-downs to filter the printed schedule.
5. Click **View Printable Version** for a printable version of the schedule.

## Sending Schedules by Email

You can use Labor Management to send approved schedules to employees through email.

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Scheduling - Schedule**, and then click **Basic Schedule Editor**.
2. Select the location, and then click **Edit**.
3. Go to a week with an approved schedule.
4. Click **Email**.
5. Order the schedule **By Job** or **By Employee**.

For example, if you select **By Job**, each row of the table corresponds to a job, and each row includes a list of employees and shifts. If you select **By Employee**, each row of the table corresponds to an employee, and each row includes a list of jobs and shifts.

6. Select to **Show End Times** for each shift. If you do not select this option, the printed schedules include only the start times for each shift.
7. Select a **Job Code** or **Job Category** from the drop-downs to filter the printed schedule.
8. Click **Email Schedule**, and then enter the recipient email addresses.

## Creating Schedule Templates

Labor Management lets you create templates for setting up schedules.

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Scheduling - Schedule**, click **Advanced Schedule Editor**, and then click **Run Schedule Editor**.
2. Select **Save as weekly schedule**, and then click **Go**.

Labor Management saves the schedule as a weekly schedule and imports the weekly schedule each week. You can select **Copy from weekly schedule** to import shifts from the template to the schedule. The schedule editor does not import shifts that are already assigned in the current template.

3. Select **Save as set schedule**, and then click **Go**.

Labor Management saves the schedule as a set template schedule. You can select **Copy from set schedule** to import shifts from the template to the current schedule. The schedule editor does not import shifts that are already assigned in the current template.

4. Select **Organize Template(s)**, and then click **Go** to open a dialog box for adding, editing, and deleting set templates.

## Customizing Schedule Appearance

1. Click **Preferences**.
2. In the **Requirements Panel** section:
  - a. Click the color box next to **Shortfall** to select the label color shown when staffing requirements are not met. You can then select or enter the color, and then click **Add Color**.

- b. Click the color box next to **Over Schedule** to select the label color shown when the allocated staffing resources surpass the staffing requirements. You can then select or enter the color, and then click **Add Color**.
3. Use the **Fixed Shift Length** time picker to select the default duration of all manually entered shifts.
4. Configure the default schedule view in the **Default View Preference** section:
  - a. Select **Team Member** to list the schedules by employee.
  - b. Select **Jobs** to list the schedules by job.
5. Configure the visible columns in the schedule view in the **Show/Hide Columns** section:
  - a. Select **Jobs** to hide the Job column, which shows the name of the job. This also affects the Job view.
  - b. Select **In Time** to hide the In column, which shows the start time of the shift.
  - c. Select **Out Time** to hide the Out column, which shows the end time of the shift.
  - d. Select **Station** to hide the Station column, which shows the station to which the shift is assigned.
6. You can configure the following default visibility settings:
  - a. Select the visible revenue center from the **RVC** drop-down.
  - b. Select the visible **Job Category** from the drop-down.
  - c. Select the visible **Job** from the drop-down.
  - d. Select the visible **Employee Status** settings.
7. Click **Save**.

## Configuring the Default View

1. Click **User Preferences**.
2. You can change the label colors in the job requirements graph:
  - a. Click **Select** next to the **Required**, **Scheduled**, or **Over Scheduled** labels.
  - b. Select the new color for the requirement type.
3. Set the default job category, job, and employee availability visibility settings:
  - a. Select the visible **Job Category** from the drop-down.

A selection in the **Job Category** drop-down list affects the available options in the **Job** drop-down.
  - b. Select the visible **Job** from the drop-down.
  - c. Select the visible **Employee Status** settings.
4. Select whether to show the **Requirements Graph** and the **Overview and Filters** by default.
5. Click **Save**.



# Employee Self Service

Employee Self Service enables you to work with scheduling functions through a desktop web browser or a mobile web browser. You log in to Reporting and Analytics through the browser to access Employee Self Service functions.

If using Reporting and Analytics release 20.1, you can access Employee Self Service from a mobile device or tablet by adding `/mobile` to the end of the original URL. For example: `https://<your Reporting and Analytics URL>/mobile`. To switch to the tablet and desktop-optimized page, click **Go To Desktop Site** at the bottom of the page.

## Configuring Employee Self Service Permissions

1. Add or configure the **MyScheduleESSPortlet** for each user role.
2. To let users approve changes to the schedule, select **Can Use Management Request Approval**.
3. Select **Can View All Function** to let users perform all scheduling functions, otherwise select the permissions you want to enable:
  - **Can Use Request Shift Change**
  - **Can Use Request Time Off**
  - **Can Use Shift Pool**
4. To let users access the master data table for employee information when using a mobile device, select **Can Access Employee Master Data on Mobile ESS**.

## Viewing Schedules

1. Log in to Reporting and Analytics.
2. Open the schedule list.

In a desktop web browser, click the side navigation menu, click **Labor Management**, click **Scheduling - Employee Self Service**, and then click **Employee Schedule**.

On a mobile device, tap **Display Approved Schedules**.

In a desktop browser, you can view a schedule for a specific week by selecting the date from the date editor. On a mobile device, you can only view the schedule for the current week.

## Printing Schedules

You can print schedules from a desktop web browser but not from a mobile device.

1. In Reporting and Analytics, click the side navigation menu, click **Labor Management**, click **Scheduling - Employee Self Service**, and then click **Employee Schedule**.
2. Click **Print Current Schedule**.

## Sending Schedules by Email

1. Log in to Reporting and Analytics.
2. To send a schedule by email from a desktop browser:
  - a. Click the side navigation menu, click **Labor Management**, click **Scheduling - Employee Self Service**, and then click **Employee Schedule**.
  - b. Click **Email Schedule**.
  - c. Specify the email address.

To send the schedule to the recipient's primary address, click **Yes** on the **Email Schedule to Primary Address** prompt. To send the schedule to a different address, click **No** on the **Email Schedule to Primary Address** prompt, type the address, and then click **Send**.
3. To send a schedule by email from a mobile device:
  - a. Tap **Display Approved Schedules**.
  - b. On the **Approved Schedules** page, tap **Send via Email**.

The system sends the schedule to the recipient's primary email address. When using a mobile device, you cannot send the schedule to a different email address.

## Requesting Time Off

1. Log in to Reporting and Analytics.
2. To request time off from a desktop browser:
  - a. Click the side navigation menu, click **Labor Management**, click **Scheduling - Employee Self Service**, and then click **Employee Schedule**.
  - b. Click **Request Time Off**.
  - c. Specify the date and time.
  - d. Select the reason for the request.
  - e. Click **Save**.
3. To request time off from a mobile device:
  - a. Initiate the request.

Tap **Create/View Time Off Request** or tap **Create New Time Off Request** if there are other requests pending.
  - b. Follow the prompts to specify the date and time, reason, and to confirm the request.
  - c. On the summary page, tap **Edit** to change the request or tap **Yes** to submit the request.

## Requesting Time Off for Other Employees

If you have a manager role, you can request time off on behalf of employees.

1. Log in to Reporting and Analytics.
2. Click the side navigation menu, click **Labor Management**, click **Scheduling - Employee Self Service**, and then click **Management Request Approval**.

3. Select the location, and then select the employee.
4. Select the date, time, and reason for the request.
5. Click **Save**.

## Requesting Shift Changes

Labor Management Employee Self Service enables you to request shift changes. In most cases, you can request changes from a desktop browser only. You can send shifts to a pool and take shifts from a pool from a desktop browser and a mobile device.

1. Log in to Reporting and Analytics.
2. Click the side navigation menu, click **Labor Management**, click **Scheduling - Employee Self Service**, and then click **Employee Schedule**.
3. Select the shift, and then click **Request Change**.
4. To request the change to the shift start time:
  - a. Select **Change Start Time**, and then select the date and time.
  - b. Type a note, and then click **Save**.
5. To assign the shift to another employee:
  - a. Select **Send to another Employee**, and then select the employee.
  - b. Type a note, and then click **Save**.
6. To accept or reject a shift sent to you from another employee, select **Accept Request** or **Reject Request**.
7. To withdraw the change request:
  - a. Select **Withdraw Request**.
  - b. Type a note, and then click **Save**.
8. To send the shift to a shift pool in a desktop browser:
  - a. Select **Send to Shift Pool**.
  - b. Type a note, and then click **Save**.
9. To send the shift to a shift pool on a mobile device:
  - a. Tap **Assign Shift to Shift Pool**.
  - b. Select the shift, and then tap **Next**.
10. To take shifts from a shift pool in a desktop browser:
  - a. Click **Shift Pool**, and then select the shifts.
  - b. Click **Apply**.
11. To take shifts from a shift pool on a mobile device:
  - a. Tap **Take Shift from Shift Pool**, and then select the shift.
  - b. Tap **Next**.

## Approving Shift Change Requests

If you have a manager role, you can approve employee change requests, such as adding shifts to a shift pool or taking shifts from a shift pool. You can approve requests in a desktop web browser only, not on a mobile device.

1. Log in to Reporting and Analytics.
2. Click the side navigation menu, click **Labor Management**, click **Scheduling - Employee Self Service**, and then click **Management Request Approval**.
3. To view all requests pending approval, select **Pending** from the **Status** drop-down.
4. To filter requests by type, select the type from the **Request Type** drop-down.
5. Select the change request, and then click **Apply**.

# 15

## Staffing

Labor Management can use forecast and sales data to generate staffing requirements for a labor period or you can manually generate them. Use the staffing requirements as a guideline for creating schedules. Setting up Labor Management for staffing requirements consists of the following high-level steps:

1. Creating a forecast profile.
2. Assigning the forecast profile to a location.
3. Creating a staffing profile.
4. Assigning the staffing profile to the location.
5. Generating the staffing requirements.

The *Oracle MICROS Forecasting and Budget User Guide* provides more information on forecast profiles.

You can set up the schedule profile to have Labor Management use the staffing requirements as input to automatically generate schedules.

## Choosing a Staffing Method

When you create a staffing profile, you add jobs to the profile, and then you select the method Labor Management uses to calculate staffing requirements for each job. Use the following table to access more information on staffing methods.

**Table 15-1 Staffing Methods**

I Want To	Go To
Define requirements by setting general threshold values based on one or two forecast profiles and forecast components, such as sales and checks. <a href="#">Example: Forecast threshold</a>	<a href="#">Defining General Forecast Requirements</a>
Define requirements by applying a productivity factor to a forecast. A productivity factor is a numeric productivity level your organization assigns to a specific job. <a href="#">Example: Forecast productivity</a>	<a href="#">Defining Forecast Productivity Requirements</a>
Define staffing requirements for job functions, such as cashiers and servers. You set a net sales threshold and Labor Management proposes the number of employees to staff based on forecast values. <a href="#">Example: Shift</a>	<a href="#">Defining Shift Requirements</a>

**Table 15-1 (Cont.) Staffing Methods**

I Want To	Go To
<p>Define staffing requirements for job functions, such as cashiers and servers, for day parts for each day of the week. You set a net sales threshold and Labor Management proposes the number of employees to staff based on the fixed resource requirements and forecast values.</p> <p><a href="#">Example: Fixed resources</a></p>	<a href="#">Defining Fixed Resource Requirements</a>
<p>Define staffing requirements according to the level of effort required to prepare menu items. You create skills, create stations, and then assign skill level requirements to the jobs associated with the profiles.</p> <p><a href="#">Example: Recipe</a></p>	<a href="#">Defining Recipe Requirements</a>
<p>Define staffing requirements by combining staffing methods:</p> <ul style="list-style-type: none"> <li>• Labor resource requirements by shifts.</li> <li>• Labor resource requirements by forecasting components.</li> <li>• Labor resource requirements for non-sales-driven activities, such as cleaning equipment and performing administrative tasks.</li> </ul> <p><a href="#">Example: Advanced General</a></p>	<a href="#">Defining Advanced General Requirements</a>

**General Step**

Define general forecast thresholds and assign staffing requirements based on the thresholds, as described in the following examples:

**Table 15-2 Single Forecast Staffing Requirements**

Forecast	Staffing Requirements
Greater than or equal to 0	1
Greater than or equal to 150	4
Greater than or equal to 500	7

If the forecast generates the value 120, the General Step method outputs a staffing requirement of 1. If the forecast generates the value 300, the General Step method outputs a staffing requirement of 4.

The following table shows staffing requirements based on two forecasts:

**Table 15-3 General Step Example for Two Forecasts**

Forecast 1 \ Forecast 2	Greater than 0	Greater than 125	Greater than 230
Greater than 0	1	3	5
Greater than 150	4	6	8

**Table 15-3 (Cont.) General Step Example for Two Forecasts**

Greater than 500	7	9	11
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If the forecast generates the values 215 and 135 for Value 1 and 2, Labor Management generates a staffing requirement of 8.

Check amounts can impact staffing requirements. For example, you have several guest checks. One check is for a very expensive bottle of wine. The check for the bottle of wine increases the forecast value causing Labor Management to increase the staffing requirement. Even though the forecast increased, additional staff is not necessary.

**Forecast Productivity**

Define productivity factors and then apply the factors to the forecasted values to determine the staffing requirements, as described in the following example:

**Table 15-4 Productivity Example**

Forecast	Productivity Factor
Greater than or equal to 0	0.037
Greater than or equal to 500	0.042
Greater than or equal to 1000	0.050

If the forecast generates the value 832, the Productivity method calculates  $832 \times 0.042$  and outputs a staffing requirement of 35.

**Shift**

Define staffing and shift requirements for each job code based on thresholds for **Net Sales of the entire system for the entire business week**, as described in the following examples:

**Table 15-5 Shift Example for Net Sales Greater Than or Equal to 0.00**

Job Code	Staffing Requirement	Start Day	End Day	Start Time	End Time
Cook 1	2	Monday	Friday	0800	1600
Cook 1	1	Monday	Saturday	1200	2000
Cook 2	1	Monday	Friday	1500	1900
Cook 3	3	Monday	Tuesday	1800	2000

**Table 15-6 Shift Example for Net Sales Greater Than 50,000**

Job Code	Staffing Requirement	Start Day	End Day	Start Time	End Time
Cook 1	4	Monday	Friday	0800	2200
Cook 1	3	Monday	Saturday	1000	2000
Cook 2	3	Monday	Friday	1500	2300
Cook 3	4	Monday	Tuesday	1700	2100

## Fixed Resources

Define staffing requirements for a day or day parts based on thresholds for **Net Sales of the entire system for the entire business week**. The following examples show requirements based on day parts:

**Table 15-7 Shift Example for Net Sales Greater Than or Equal to 0.00**

Day Part	Monday Requirement	Tuesday Requirement	Wednesday Requirement	Thursday Requirement	Friday Requirement	Saturday Requirement	Sunday Requirement
Breakfast	2	3	2	2	2	2	2
Lunch	3	3	3	3	3	3	3
Dinner	1	1	1	1	1	2	1

**Table 15-8 Shift Example for Net Sales Greater Than 50,000**

Day Part	Monday Requirement	Tuesday Requirement	Wednesday Requirement	Thursday Requirement	Friday Requirement	Saturday Requirement	Sunday Requirement
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

Define staffing requirements based on the effort required to prepare menu items. For example, you specify 90 seconds as the effort required to prepare a pizza, and the forecasted value of pizza sales for a shift is 250. The total effort required to make pizzas for the shift is 22,500 seconds (90 x 250) or 375 minutes. To determine staffing requirements for 15-minute intervals for the forecast, the total effort in minutes is divided by 15 (375/15) for a staffing requirement of 25.

## Advanced General

Combines the shift method and the general step forecast threshold method. The advanced general method enables you to configure:

- Labor resource requirements by shifts.
- Labor resource requirements by forecasting components.
- Labor resource requirements for non-sales-driven activities, such as cleaning equipment and performing administrative tasks.

# Creating Staffing Profiles

1. In Reporting and Analytics, click **Labor**, click **Staffing Profile**, and then click **Staffing Profile Creation**.
2. Click **Add**, and then type a profile name and description.



3. To consolidate all requirements within the staffing profile by the job code, select **Aggregate Requirements by Job Code**.
4. Click **Save**.
5. Add jobs to the staffing profile, and then define staffing requirements for the jobs.

## Adding Jobs to a Staffing Profile

1. In Reporting and Analytics, click **Labor**, click **Staffing Profile**, and then click **Staffing Profile Creation**.
2. Select the profile from the table, and then click **Add Job**.
3. Select the **Job Category** or **Job Code**.

Selecting a category applies the calculation method to all the jobs associated with the category. For example, a front-of-house (FOH) value applies to hosts, bartenders, waiters, and waitresses. Selecting a code applies the calculation method to a specific job such as a bartender. You can use skill requirements for job categories to control baseline requirements for all jobs that belong to a category.

You can exclude an employee from staffing requirement calculations for a job when you define the job and pay settings for the employee.

4. Type a labor name and description, such as `Bar` and `Runner`.
5. Select the staffing method from the **Method** drop-down.
6. Select **Active** to enable the job.
7. To define requirements for the selected staffing method, click **Next**.

## Defining General Forecast Requirements

1. Select the job duration:
  - To define requirements for day parts, such as breakfast and lunch, select **Day Part**, and then click **Next**.
  - To define requirements for the entire day, select **Day**, and then click **Next**.
2. Define job settings for the day or day parts. If you selected **Day** in step 1, start with step 2.c.
  - a. To define different settings for each day part, deselect **Day Part**. To apply the same settings to each day part, select **Day Part**.
  - b. In the **Duration** drop-down, select the length of time for day parts as a whole or for each day part.
  - c. Select a **Lead/Lag** value.

**Lead:** When determining the number of employees to fill a job, Labor Management includes a time period leading up to the staffing requirement. For example, a location needs two servers between 11:15 a.m. and 11:30 a.m. If you specify a lead duration of 15, Labor Management determines the location needs the two servers starting at 11:00 a.m.

**Lag:** When determining the number of employees to fill a job, Labor Management includes a time period after the staffing requirement. For example, a location expects a dinner rush from 5:00 p.m. to 8 p.m. Since there are not many dishes to wash at the beginning of the rush, the location needs only one dishwasher from 4:00 p.m. to 6:00 p.m. Labor Management detects a sharp increase in sales from 5:15 p.m. to 5:45 p.m.,

- meaning there are more dirty dishes. Set a lag duration value to staff more dishwashers starting at 6:00 p.m.
- d. To assign the job settings to revenue centers, click **Select**, select the revenue centers, and then click **Assign**.
3. Define driver settings for the day or parts:
    - a. Select the number of drivers:
 

**One Staff Driver:** Specify labor quantity threshold values for one forecast profile.

**Two Staff Driver:** Specify labor quantity threshold values for two forecast profiles.
    - b. Select the **Forecast Profile** and the **Forecast Component**.
    - c. To associate order types with the selected profile, click **Order Type**, select the order types, and then click **Assign**.
    - d. To associate menu items with the selected profile, click **Menu Item**, select the menu items and groups, and then click **Assign**.
    - e. In the **Requirement** section, specify the labor quantities needed for threshold values.
    - f. If necessary, repeat these substeps for the second driver.
  4. Click **Save**.

## Defining Forecast Productivity Requirements

1. Select the job duration:
 

To define requirements for day parts, such as breakfast and lunch, select **Day Part**, and then click **Next**.

To define requirements for the entire day, select **Day**, and then click **Next**.
2. Define job settings for the day or day parts. If you selected **Day** in step 1, start with step 2.c.
  - a. To define different settings for each day part, deselect **Day Part**. To apply the same settings to each day part, select **Day Part**.
  - b. In the **Duration** drop-down, select the length of time for day parts as a whole or for each day part.
  - c. Select a **Lead/Lag** value.
 

**Lead:** When determining the number of employees to fill a job, Labor Management includes a time period leading up to the staffing requirement. For example, a location needs two servers between 11:15 a.m. and 11:30 a.m. If you specify a lead duration of 15, Labor Management determines the location needs two servers starting at 11:00 a.m.

**Lag:** When determining the number of employees to fill a job, Labor Management includes a time period after the staffing requirement. For example, a location expects a dinner rush from 5:00 p.m. to 8 p.m. Since there are not many dishes to wash at the beginning of the rush, the location needs only one dishwasher from 4:00 p.m. to 6:00 p.m. Labor Management detects a sharp increase in sales from 5:15 p.m. to 5:45 p.m., meaning there are more dirty dishes. Set a lag duration value to staff more dishwashers starting at 6:00 p.m.
  - d. To associate the job settings with revenue centers, click **Select**, select the revenue centers, and then click **Assign**.
3. Define driver settings for the day or for day parts:

- a. Select the **Forecast Profile**.
  - b. To associate order types with the selected profile, click **Order Type**, select the order types, and then click **Assign**.
  - c. To associate menu items with the selected profile, click **Menu Item**, select the menu items and groups, and then click **Assign**.
  - d. In the **Requirement** section, specify productivity factors for threshold values.
4. Click **Save**.

## Defining Shift Requirements

1. Select the **Forecast Profile**.
2. To associate the requirements with a revenue center, click **Select**, select the revenue centers, and then click **Assign**.
3. In the **Net Sales** field, specify the net sales threshold value.
4. Define the labor requirements for the shift:
  - a. In the **Count** field, specify the number of employees.
  - b. Select the days of the week.
  - c. Select the shift start and end times for the selected days.
  - d. To define labor requirements for another shift, click **Add Row**, and then repeat these substeps.
5. To add a net sales threshold, click **Add Matrix**.
6. Click **Save**.

## Defining Fixed Resource Requirements

1. Select the job duration:

To define requirements for day parts, such as breakfast and lunch, select **Day Part**, and then click **Next**.

To define requirements for the entire day, select **Day**, and then click **Next**.
2. Define job settings for the day or day parts.
  - a. Select the **Forecast Profile**.
  - b. To associate the job settings with revenue centers, click **Select**, select the revenue centers, and then click **Assign**.
  - c. In the **Net Sales** field, specify the net sales threshold value.
  - d. Specify the number of employees needed for each day of the week or for each day part for each day of the week.
3. To add a net sales threshold, click **Add Matrix**.
4. Click **Save**.

## Defining Recipe Requirements

Because there is a dependency between skill level assignments, station assignments, and recipe staffing requirements, set up the assignments when you define the staffing requirements.

1. Select the **Forecast Profile**.
2. To assign order types to the job, click **Order Type**, select the order types, and then click **Assign**.
3. To assign revenue centers to the job, click **Revenue Center**, select the revenue centers, and then click **Assign**.
4. To assign menu items to the job, click **Menu Item**, select the menu items and groups, and then click **Assign**.
5. Select a **Lead/Lag** value.

**Lead:** When determining the number of employees to fill the job, Labor Management includes a time period leading up to the staffing requirement. For example, a location needs two cooks for a dinner rush from 5:00 p.m. to 7:00 p.m. To prepare for the rush, you specify a lead duration of 15. Labor Management determines the location needs the two cooks starting at 4:45 p.m.

**Lag:** When determining the number of employees to fill a job, Labor Management includes a time period after the staffing requirement. For example, a location anticipates a lunch rush from 11:00 a.m. to 1:00 p.m. Labor Management detects burger sales sharply increase starting at 12:15 p.m. Set a lag value to add another grill cook starting at 12:00 p.m.

6. In the **Duration for Lead/Lag** field, specify the lead or lag duration in 15-minute intervals.
7. In the **Default Efforts Required** field, specify the amount of time it takes to prepare the item in seconds.
8. Click **Save**.

## Defining Advanced General Requirements

1. Select the number of drivers Labor Management uses when generating the requirements.
2. On the **Fixed Resource** tab, define shift settings for the job:
  - a. Select the days, start time, and end time.
  - b. In the **Labor QTY** field, specify the number of employees needed to fill the shift.
  - c. To add a shift, click **Add Row**.
3. On the **Additional Resources** tab, define job settings according to thresholds for forecast values.
4. On each day part tab, define job settings according to thresholds for forecast values.
5. On each **Day** or day part tab, in the **Requirement** section:
6. Click **Save**.

## Assigning Skill Levels to Jobs

If you defined staffing requirements for jobs according to the level of effort needed to prepare menu items, you can assign skill levels to the jobs. Before you assign skill levels to jobs, verify you have completed the following tasks:

- Added job codes
  - Added job categories
  - Added skill levels
  - Created stations
1. In Reporting and Analytics, click **Labor**, click **Staffing Admin**, and then click **Assign Skill Levels to Staff Requirements**.
  2. To limit skill level assignments and requirements to one station, select **Enforce Unique Station**.
  3. Click **Add**, or select a job category or job code requirement and then click **Edit**.
  4. Select a **Job Category** or **Job Code**.  
  
Job categories apply to all jobs that belong to the category. You can use skill requirements for job categories to control baseline requirements for all jobs that belong to a category.
  5. To activate the skill requirement, select **Active**.
  6. Click **Day Part**, select the day parts for which the skill requirement applies, and then click **Assign**.
  7. Select the days of the week for which the skill requirement applies, and then click **Next**.
  8. In the **Requirement** field, enter an estimated number of employees required to fill the job category or job code.
  9. For each configured skill level, enter the number of employees to meet the skill requirement. The total number of employees across the skill levels cannot be higher than the number entered in **Requirement**. Labor Management automatically calculates the number of employees that can be **Any Level**.
  10. For each skill level with at least one employee, click **Assign Skills to Station** to specify the station breakdown for the requirement.
    - a. Click **Add**.
    - b. Select a station, and then enter the employee **Requirement**.
    - c. Repeat the process until you assign all employees to stations, and then click **Save**.  
  
For example, if you need three employees with a level 3 skill requirement, you can assign one to the Drink Bar station, one to the Grill station, and one to Any Station. Assign all three required employees.
  11. Click **Save**.

## Assigning Stations to a Location

If you defined staffing requirements for jobs according to the level of effort needed to prepare menu items, assign stations to a location.

1. In Reporting and Analytics, click **Labor**, click **Staffing Admin**, and then click **Station/Sections Definitions**.

2. To assign more than one station to one location (for example, after adding a new location):
  - a. Click the **Multiple Stations to One Location** tab.
  - b. Select the location from the **Locations** list.
  - c. In the **Stations** section, use the arrows to assign the stations.
  - d. Click **Apply** to continue making changes, or click **Save**.
3. To assign one station to more than one location (for example, after adding a station for use by all stores):
  - a. Click the **Single Station to Multiple Locations** tab.
  - b. Select the station from the **Stations** drop-down.
  - c. Select the **Locations**.
  - d. Click **Apply** to save and continue making changes, or click **Save**.

## Assigning Staffing Profiles to Organization Levels

Locations cannot use staffing profiles until you associate the profiles with organization levels.

1. In Reporting and Analytics, click **Labor**, click **Staffing Profile**, and then click **Assign Profiles to Organization Level**.
2. To search for a level, type part of the location name, and then click **Search**.
3. In the row for the organization level, select the profile from the **Staffing Profile** drop-down.
4. To view staffing profiles assigned to a location with a forecast profile different than the forecast profile assigned to the organization, click **Mismatch of Forecast Profiles**, and then update the profiles.
5. To save changes when working with multiple locations, click **Apply**, or click **Save** to save all changes.

## Creating Stations

A station is an area within a location. For example, the grill, the pantry, and the deep fryer are stations in the kitchen. After you create stations, you can assign them to shifts when editing schedules. In most cases, you use stations when basing staffing requirements on the effort required to prepare menu items.

1. In Reporting and Analytics, click **Labor**, click **Staffing Admin**, and then click **Station/Sections Definitions**.
2. Click **Add**, or select a station and then click **Edit**.
3. Update the **Name** and **Description**, and then click **Save**.