

Methodology example 1:

Converting 'key-stroke' instructions / guides for IT systems



Before

- Mostly 'key stroke' level documentation
- The actual process is obscured, buried in detail



After

- Key process steps are clear
- Process exceptions highlighted using 'Notes'
- Keystroke documentation separated into manageable pieces of information as 'Guides'

SUBJECT: PAYROLL PROCEDURES

Purpose

To retrieve all payroll records from each restaurant on a weekly basis to ensure payment of wages.

Method

1. Every Tuesday afternoon run a Check Received Payroll Report in the STM system.
 - Type **3. Payroll** enter
 - Type **1. Check Received Payroll Records** enter
 - Type **Y** to Proceed enter
 - This will take a minute or two to run
 - Press enter to display report

2. Check the following information is on the report. If not, make a note of that restaurant to resend later.
 - All Restaurants are in numerical order
 - Make note of missing restaurants
 - Check number of employees in restaurant. If less than 16 you may need to do a resend that restaurant.
 - To end out of the screen type **Q** and then down arrow to **Email File**, give the file a name and enter.
 - Type **end**, enter to get back to main menu
 - Type **4. Electronic Mail System** enter
 - Type **1. Send Email** enter
 - Type initials of person you are sending it to
 - Enter in a subject
 - Enter through CC, Urgent, Print and ID
 - Enter in name of file
 - Enter through all lines until you reach the end, **N to not print email**
 - Enter **Y to save**, this will send the email

**** Please note that Restaurant 65 (Dairy Flat) has no connection with Head Office, each week one of the IT guys will get this data for you.****

3. To log into individual stores you will need to do the following:
 - i. Type **end**, to get back to main menu
 - ii. Type **LOGOFF**
 - iii. At this prompt, **STM9400:/app/rms/obj#**, type **ssh stm9401** (or which ever restaurant number you want to enter into
 - iv. At this prompt, **[root@stm9401 root]#**, type **su rmsasi**
 - v. At this prompt, **stm9401:/opt/rms/rmsobj#**, type **run**
 - vi. Once you are logged into the store, type **1, Back of Store**



Before

- vii. Type **5, Employee Sub Hours Menu**
 - viii. Type **9, Transfer Weekly Payroll**
 - ix. Make sure week end date is correct (it will always default to current week ending date) **enter**
 - x. Type **Y to Resend Data,**
 - xi. Type **Y to Proceed With Post,**
 - xii. Once it has finished it's transfer it will automatically go back to the menu
 - xiii. Type **End** to end out of menu
 - xiv. Type **LOGOFF** to end out of store
 - xv. At this prompt, **stm9401:/opt/rms/rmsobj#** type **wantrn \$RMSCFG** to transfer data to head office
 - xvi. At this prompt, **stm9401:/opt/rms/rmsobj#** type **exit**
 - xvii. At this prompt, **[root@stm9401 root]#** type **exit**, this will take you back to the this prompt **STM9400:/app/rms/obj#**, where you can enter into another store using the steps above from number **iii** or go back into the head office menu by typing **run**
4. If at number **xii**, it doesn't go back to menu and comes up with a message that says "*****" (**crew number**) **complete data on dd/mm/yy**" the payroll has NOT been reconciled and will not send.
- i. If the date is **within** the current pay week, either call the restaurant manager and ask them to reconcile their hours or:
 - At main menu, Type **1. Back of Store**, enter
 - Type **5. Employee Sub Hours Menu**, enter
 - Type **2. Weekly Hours Maintenance**, enter
 - Enter week end date, enter
 - Enter crew number to be reconciled, enter
 - **END** to complete the reconciliation process
 - Enter the next employee number or page down
 - Enter to bring up the current hours
 - Check the hours and **END** to completeFollow this procedure for every employee who is not reconciled.
 - ii. If the date is **outside** the current pay week:
 - At main menu, Type **2. System Functions**, enter
 - Type **2. Serviceman Utilities**, enter
 - Type **4. Transfer Weekly Payroll**, enter
 - Enter date of payroll to resend, enter
 - Type '**N**' (No) to resend, enter
 - Type '**Y**' to proceed, enter
 - Go back to main menu by hitting **End**
 - Type **1. Back of Store**, enter
 - Type **5. Employee Sub Hours Menu**, enter
 - Type **2. Weekly Hours Maintenance**, enter
 - Enter week end date, enter
 - Enter crew number to be reconciled, enter
 - **END** to complete the reconciliation process
 - Enter the next employee number or page down
 - Enter to bring up the current hours
 - Check the hours and **END** to complete

1 Before

Follow this procedure for every employee who is not reconciled.

- When all hours have been reconciled end out of option '2' and return to '9', Transfer Weekly Payroll.

Follow resend payroll procedures (3 vi), running the Transfer Weekly Payroll twice, otherwise if there was a locked record from previous week only 1 employee's data will come across.

5. Once you have completed steps 3 and 4 for all missing stores, go back to H/O Menu by typing **run** at this prompt: **STM9400:/app/rms/obj#** and then hit **enter** to enter into the main menu.

Then type:

- **1. Store Administration System**, enter
 - **1. Load Store Data**, enter
 - **2. Check Received Directories**, enter. This will take a while to come up.
 - Check that all the stores that you transferred are there, end out of there
 - **5. Load Received Data**, enter
 - Hit **Home** if all data received is payroll otherwise type individual store numbers
 - **Y** to proceed, enter
 - When it has finished, hit end or Q or enter
 - Hit end twice to get back to main menu
6. Run another Check Received Payroll Report following the steps in number 1.
 - Check all stores are in, if there are some missing still, go back to steps 3, 4 and 5

To Unsend Payroll

If a restaurant calls on Tuesday morning asking to unsend payroll so they can adjust some hours, follow these steps:

- Type **end**, to get back to main menu
- Type **LOGOFF**
- At this prompt, **STM9400:/app/rms/obj#**, type **ssh stm9401** (or which ever restaurant number you want to enter into)
- At this prompt, **[root@stm9401 root]#**, type **su rmsasi**
- At this prompt, **stm9401:/opt/rms/rmsobj#**, type **run**
- Once you are logged into the store, type **2. System Functions**, enter
- Type **2. Serviceman Utilities**, enter
- Type **4. Transfer Weekly Payroll**, enter
- Enter date of payroll to resend, enter
- Type '**N**' (No) to resend, enter
- Type '**Y**' to proceed, enter
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**** DO NOT PROCEED TO THE NEXT STEP UNTIL ALL RESTAURANTS HAVE BEEN RECEIVED IN. FOLLOW STEPS 3, 4 & 5 UNTIL ALL COMPLETE.**

7. The following process is to load all payroll records ready for transfer to Affinity Payroll System

1 Before

- Type **3. Payroll** enter
- Type **2. Load Received Payroll Records** enter
- Press **Y** enter to produce report
- Press **Y** enter to proceed
- Check number of employees on bottom of report equals the updated Check Received Directories report
- Make doubly sure ALL restaurants are loaded and ready to go

8. You are now ready to transfer payroll for import to Affinity Payroll System

- Press **4. Send Payroll To Mantrack** enter
- *Week Ending Date* Type Mondays date enter
- *Resend* Press **N** enter
- *Sent Batch* Skips over
- *Starting Store Code* 9401
- *Ending Store Code* Whatever restaurant number we are up to (9965?)
- *Proceed With Dump* Press **Y** enter

9. Open another session within the STM System (session two)

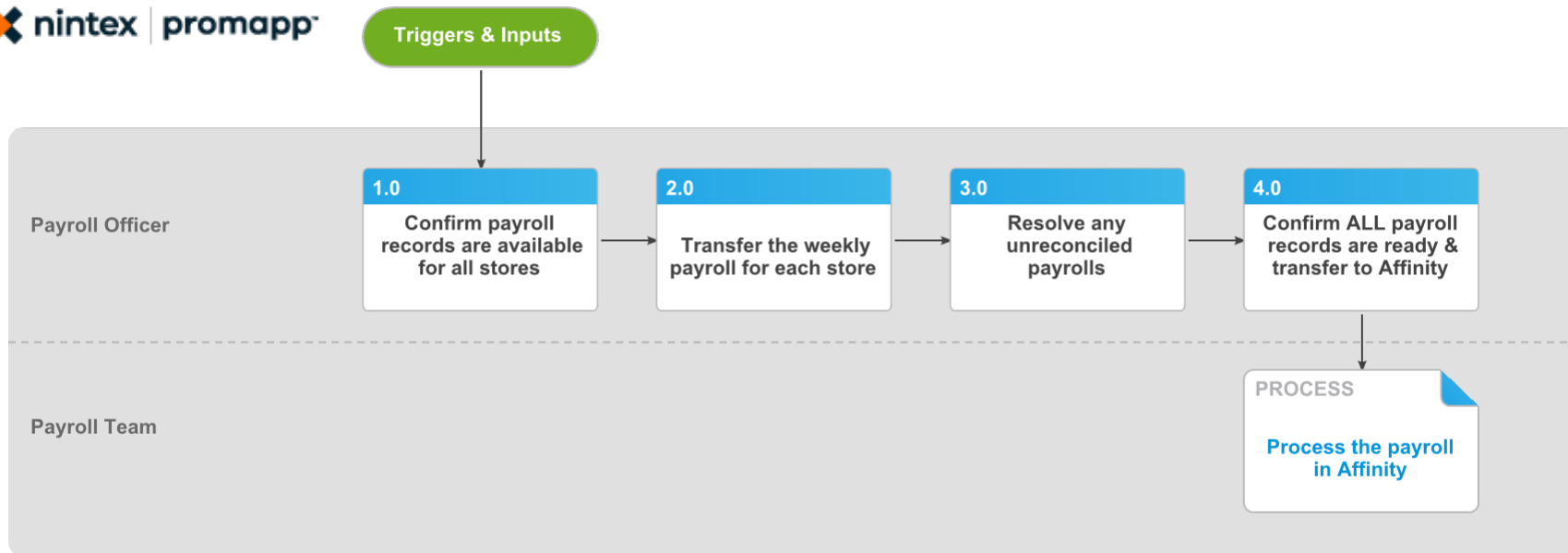
- Then at the **STM9400:/app/rms/obj#:** command (before you type run to get into main menu) type **chkpay**. This will then show the number or records loaded. It should be several thousand (400,000 at least)
- If it says **0** at the **#:** command type **delpay**. STM will give you what week of payroll to delete. Choose **this** week.

10. Back in the STM System session one

- Press **4. Send Payroll To Mantrack** enter
- *Week Ending Date* Type Mondays date enter
- *Resend* Press **Y** enter
- *Sent Batch* 00 enter
- *Proceed* Press **Y** enter

11. Back in session two of the STM system

- Repeat step 9 and 10 until all records are present (should be several thousand)



Summary

To retrieve accurate payroll records from each restaurant on a weekly basis and to transfer them to the Affinity System once they are confirmed as correct and complete.

Owner Promapp Promaster

Expert Promapp Promaster

Procedure

1.0 Confirm payroll records are available for all stores

Payroll Officer

- a** Run the Check Received Payroll Report in the STM system

How to run the STM Check Received Payroll Report.docx

- b** Check that all restaurants are included and that the number of employees per store looks valid

NOTE **What if all required information is missing?**

If a restaurant is missing from the report or if number of employees is less than 16, make a note to resend to applicable restaurants later

NOTE **What if store has no connection with head office?**

The Dairy Flat Store has no connection with head office. The payroll record for this store will be provided by the IT Team.

2.0 Transfer the weekly payroll for each store

Payroll Officer

- a** Transfer the weekly payroll for each store - refer to the Guide below for detailed instruction

How to transfer weekly payrolls.docx

NOTE **What if restaurant request to unsend the payroll?**

If a restaurant calls on Tuesday morning asking to unsend the payroll so they can adjust some hours refer to the Guide below

How to un-send a payroll.docx

3.0 Resolve any unreconciled payrolls

Payroll Officer

- a** If a payroll does not reconcile and the date is within the current pay week call the Restaurant Manager and ask them to reconcile their hours or perform reconciliation yourself with reference to the Guide below

How to reconcile a payroll inside the current pay week.docx

- b** If a payroll does not reconcile and the date is outside the current pay week perform reconciliation yourself with reference to the Guide below

How to reconcile a payroll outside the current pay week.docx

4.0 Confirm ALL payroll records are ready & transfer to Affinity

Payroll Officer

- a** Once you have transferred all weekly payrolls, including those which had to be reconciled check that all the stores you transferred are there

- b** Run a Check Received Payroll report and confirm all stores are accounted for

How to run the STM Check Received Payroll Report.docx

- c** Once you are sure all payroll records have been received and are reconciled, transfer them to Affinity. Refer to the guide below for detailed instructions

How to transfer Restaurant payroll records to Affinity.docx

PROCESS **Process the payroll in Affinity**
Payroll Team

Triggers & Inputs

TRIGGERS

None Noted

INPUTS

None Noted

Outputs, Linked Process Stakeholders & Performance Targets

OUTPUTS

None Noted

STAKEHOLDERS FROM LINKED PROCESSES

Process	Owner	Expert	Process Group
Process the payroll in Affinity	Promapp Promaster	Promapp Promaster	Training Material Processes

STAKEHOLDERS

None Noted

PERFORMANCE TARGETS

Measure	Target
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