



BROADWAY
Restaurant Group

LEARNING THROUGH LEADERSHIP



RTI Training Manual

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Cash Systems – Counting Tills (NCR Systems)

Managing cash in RTI includes the following items:

1. Counting tills (NCR Only)
2. Entering safe counts (petty cash)
3. Entering deposits (NCR Only)

NOTE FOR SICOM POS USERS: Tills (inserts) must be counted and entered into SICOM.

Step 1

From the “Deposits, Drawers & Sales Activity” tab, select “Balance Drawers”, then “Import” from the bottom right of the pop up windows.

This will bring the till information from the register into RTI.

Store #	Descript.	Till #	Cashier	Date	Status	Over/Short
9518	9518 - ..	181		8/30/2020	Pending	-56.90
9518	9518 - ..	2799		8/30/2020	Counted	-0.18
9518	9518 - ..	2799 (2)		8/30/2020	Pending	0.00
9518	9518 - ..	6409		8/30/2020	Pending	-5.39
9518	9518 - ..	7548		8/30/2020	Counted	-8.50
9518	9518 - ..	7548 (2)		8/30/2020	Pending	7.85
9518	9518 - ..	2918		8/31/2020	Pending	-121.32
9518	9518 - ..	6737		8/31/2020	Pending	-21.84

Step 2

Once the POS Data has been imported, Review the “Status” to determine which tills need to be counted.

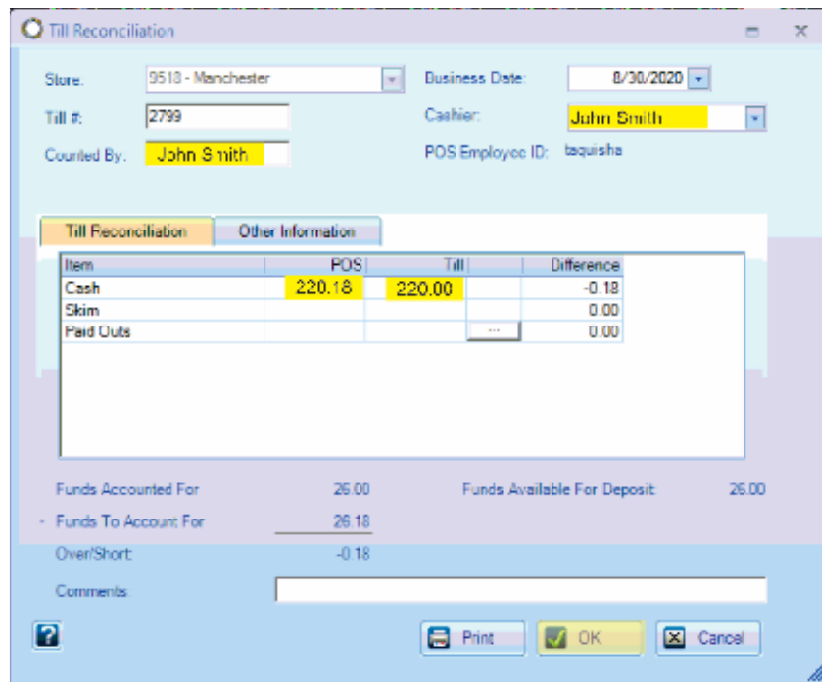
Pending tills have not yet been counted. Counted tills have been counted.

To count a “Pending” till, highlight the till and select “Change”. This will open the till information.

Step 2 cont.

Enter the following information:

1. Cashier (from the drop down)
2. Counted By (name of the person counting)
3. Till Amount (NOTE: The POS amount is the expected cash that was rung up and the Till amount is the actual amount of cash counted).
4. The box with 3 dots next to the Till amount is a pop up calculator allowing you to enter the count of bills and coin.
5. Click the "OK" button to save and exit.



Item	POS	Till	Difference
Cash	220.18	220.00	-0.18
Skim			0.00
Paid Outs		...	0.00

Funds Accounted For: 26.00 Funds Available For Deposit: 26.00
 - Funds To Account For: 26.18
 Over/Short: -0.18

Comments:

Buttons: Print, OK, Cancel

Cash Systems – Counting Tills (Sicom Systems)

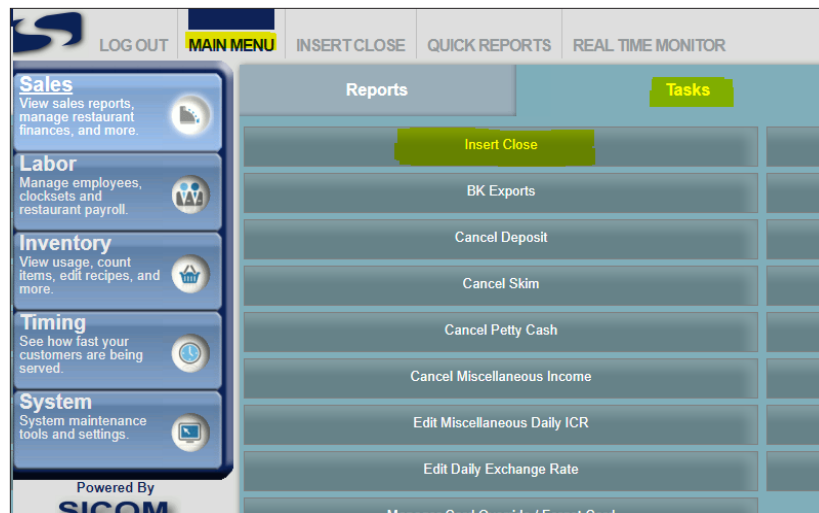
Managing cash in in Sicom systems includes the following items:

1. Counting tills (Sicom)
2. Closing Shifts/Entering Deposits (Sicom)
3. Entering safe counts (petty cash)

NOTE FOR SICOM POS USERS: Tills (inserts) must be counted and entered into SICOM.

Step 1

From the Main Menu in the POS, go to “Tasks” tab, and select “Insert Close”.



This will bring up the “Insert Close” Screen.

The screenshot shows the 'Insert Close' screen. It displays a table with columns for Name, Computed, Counted, Variance, and Currency Calc. The 'Counted' column for 'Declared Cash' is highlighted in yellow, showing a value of 247.00.

Name	Computed	Counted	Variance	Currency Calc
Drawer Skims	500.00	500.00	N/A	N/A
Declared Cash	247.72	247.00	0.00	<input type="checkbox"/>
Total Cash	747.72	747.72	0.00	N/A
Petty Cash	0.00	0.00	N/A	N/A
Misc Income	0.00	0.00	N/A	N/A
Credit Receipts	1360.10	1360.10	0.00	N/A
Gift Card Recharge	0.00	0.00	0.00	N/A
Gift Card Redeem	3.57	3.57	0.00	N/A
Total Receipts	2111.39	2111.39	0.00	N/A

Step 1 cont.

Once the “Insert Close” screen appears, from the drop down menu labeled “Insert Close”, select the name of the cashier who’s drawer you are counting.

Enter the total amount of money counted in the drawer in the space on the “Declared Cash” line and “Counted” column.

You will see that it auto populates any drawer skims, credit cards, etc so you should not count those.

Click the “Submit” button on the top left of the screen.



NOTE:

- ✚ Please enter EXACTLY what you are depositing into the safe. For Example, if you count \$247.72, you will only deposit \$247 in the safe so you should enter \$247 in the box.
- ✚ Only Logged Off or Deactivated inserts can be closed. If the insert you want to close is not in the “Insert Close” dropdown list, go to the POS terminal where the insert is still logged on, and log it off or deactivate it. The logged off or deactivated insert will not be on the insert closed list until you exit and the reenter the Insert Close function.

Step 2

The second piece to counting drawers in Sicom systems is to complete the shift close and enter your deposit.

Each manager should complete a shift close and enter a deposit at the end of their shift. There should never be two managers using one shift.

From the “Sales” main menu, select the “Tasks” tab, and then “Shift Close” And this will bring up the “ShiftClose” screen.



Step 2 cont.

LOG OUT MAIN MENU INSERT CLOSE QUICK REPORTS REAL TIME MONITOR

SUBMIT BACK HELP

Shift Close # 1

Closed Inserts from this Shift

Ins. #	Employee	Computed Cash	Declared Cash	Cash O/S	Computed Others	Declared Others	Others O/S	O/S	Total Cash	Closed By
3	4224 Madison, Patricia	247.72	243.00	-4.72	28.09	0.00	-28.09	-32.81	743.00	Nrobinsom

Active Inserts

Ins. #	Employee	Opening Cash	Skims
8	1 Ordering, BK Mobile	0.00	0.00
10	301 1, Kiosk	0.00	0.00
1	4224 Madison, Patricia	0.00	0.00
2	4224 Madison, Patricia	0.00	0.00
4	1328 Brown, Alexius	0.00	0.00

Expected Cash this Shift

Shift Starting Cash	1700.00
+ Declared Total Cash this Shift	243.00
+ Skims this shifts (from inserts closed in this shift)	500.00
+ Misc Income from this Shift [Safe]	0.00
NA Misc Income from this Shift [Drawer]	0.00
- Petty Cash from this Shift [Safe]	0.00
NA Petty Cash from this Shift [Drawer]	0.00
+ Skims this shift (from unclosed inserts)	0.00
NA Skims in previous shifts (from inserts closed in this shift)	0.00
= Computed Shift Cash	2443.00

Cash Reconciliation

Total Cash	-	Computed Shift Cash	=	Shift Cash Over/Short Manager
0.00		2443.00		-2443.00

Shift Cash Over/Short Breakdown

Shift Over/Short Manager	-2443.00	+	Shift Cash Over/Short Cashier	-4.72	+	Shift Others Over/Short Cashier	-28.09	=	Shift Over/Short
									-2475.81
									Running Daily Over/Short
									= -2475.81

[Show Over/Short Incident Report](#)

Cash Deposits Made this Shift

Username	Bag Id.	Amt.

Include a Deposit with Shift Close

Bag Id

Amount

Use Currency Calculator

Actual Cash this Shift

Safe Count

Use Currency Calculator

+ Cash in Active Inserts	0.00
+ Other Cash On-site/Receipts	0.00
+ Cash Deposits this Shift	0.00
= Total Cash	0.00
Ending Cash	0.00

Enter the following information in the appropriate block:

- ✚ Bag ID – IF you use bank bags, enter the bag number. If you use a smart safe, enter 12345.
- ✚ Amount – This is the actual dollar amount of your deposit. If you take deposits to the bank, this will be the counted total of all of your tills. If you use a smart safe, you will run a report from the safe showing the total amount of deposits from your shift and enter that number here.
- ✚ Safe Count – Enter the total amount of change on hand in your safe.

Once all data is entered, click on the “Submit” button on the top left.

NOTE:

If your cash Over/Short exceeds tolerance levels, a pop up window will appear and require you to enter the reasons for the variance, and any coaching steps taken. Once this is entered, you may close this window out and hit “Submit” again.

When RTI completes the next import, it will automatically pull all information on counted tills, and deposits into the system.

Sicom systems should never need to manually enter a deposit into RTI. If this is the case, you should contact your support team right away.

Cash Systems – Safe Counts

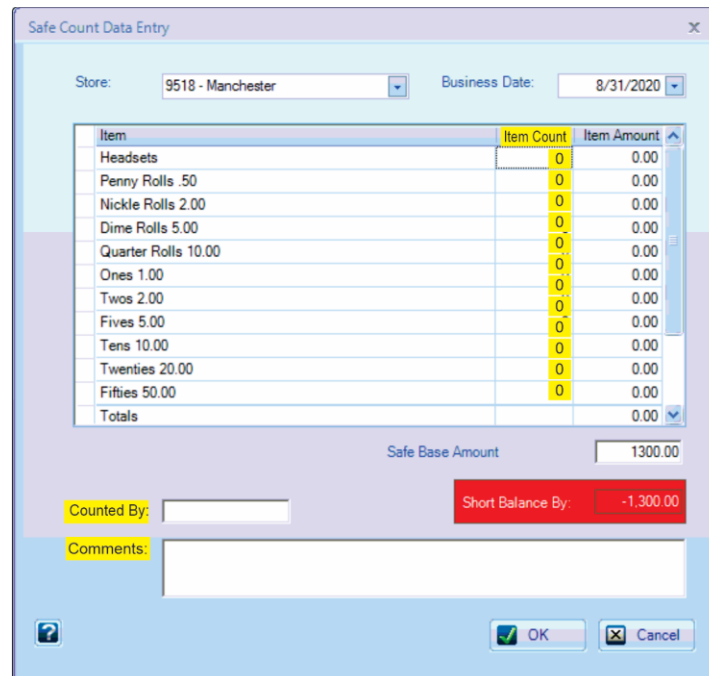
At open, close and each shift change, the manager on duty must verify the safe count.

Step 1

From the “Daily Checklist” tab, select “Opening Tasks”, “Shift Change Tasks”, or “Closing Tasks” depending on what time of day it is. Select the “Add” button to enter a new safe count.

Complete the following information:

- Item Count: Select the quantity of each item: Headsets, cash, and coin
- Counted By: Enter the name or initials
- Comments: If the balance does not match, a comment must be entered.



Safe Count Data Entry

Store: 9518 - Manchester Business Date: 8/31/2020

Item	Item Count	Item Amount
Headsets	0	0.00
Penny Rolls .50	0	0.00
Nickle Rolls 2.00	0	0.00
Dime Rolls 5.00	0	0.00
Quarter Rolls 10.00	0	0.00
Ones 1.00	0	0.00
Twos 2.00	0	0.00
Fives 5.00	0	0.00
Tens 10.00	0	0.00
Twenties 20.00	0	0.00
Fifties 50.00	0	0.00
Totals		0.00

Safe Base Amount: 1300.00

Counted By:

Comments:

Short Balance By: -1,300.00

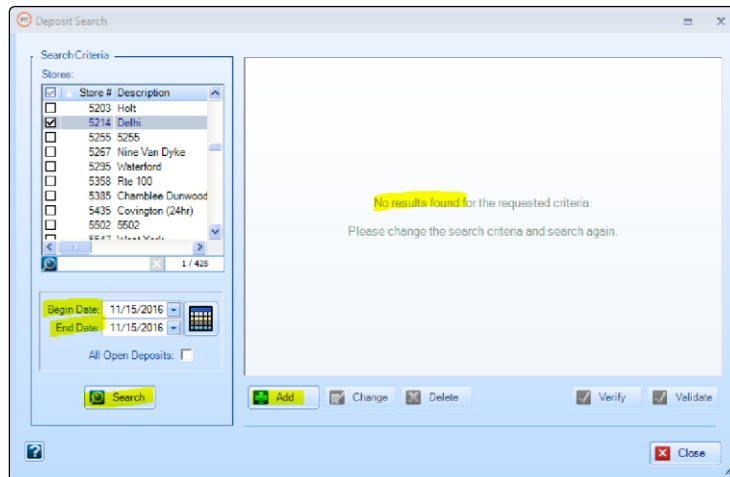
OK Cancel

Cash Systems – Adding a Deposit (NCR only)

Step 1

From the “Daily Checklist” tab, select “Shift Change Tasks” or “Closing Tasks” depending on time of day and then select “Enter Deposit (ALOHA STORES ONLY)”.

A Deposit Search box will pop up – click “Add” to add a new deposit.



Step 2

Clicking “Add” will bring up a “Create New Deposit” box with the restaurant and business date pre-populated. Select the “Till” button to view all of the counted tills that are available to be included.

To complete the deposit, fill in the following information:

1. Deposit Bag #
2. Created By (name of manager creating the deposit)
3. Comments – Any issues or feedback entered here.

Sales Projections – Add / Update Projections

Step 1

From the “Schedule, Punches & Labor Cost” tab, select “Projections”

Step 2

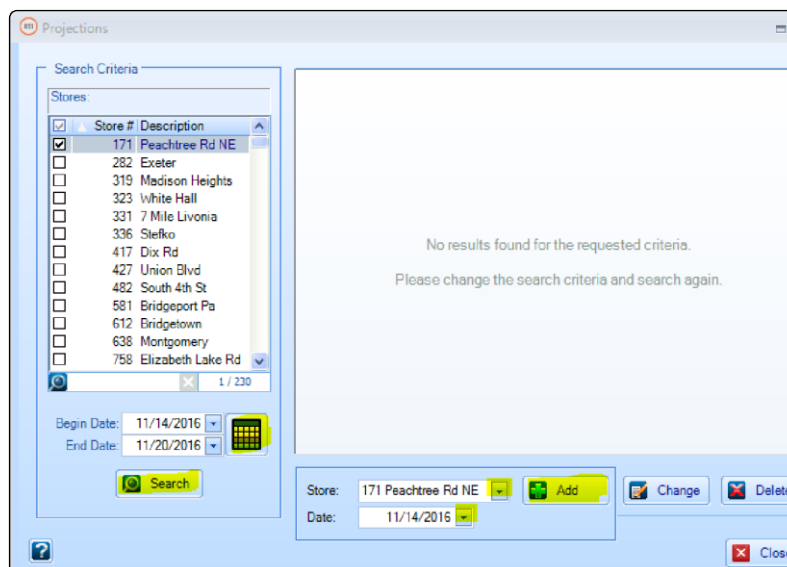
Start by selecting the week you are creating projections for by clicking the calendar icon, selecting the proper date range, then press “Search”

Step 3

If no projections exist for the week selected, you will “Add new projections.

Step 4

To “Add” projections select any day in the week you are projecting, then select the “Add” button.



Tips

- If you “Add” projections for a time period where projections already exist, you will delete and overwrite your previous work.
- If you see projections after searching, do not Add - you should highlight a day within that week and press the “Change” button to edit the existing projections.

Good to Know

There are several important areas of the Projections function:

- ✦ **Trend:** This is a weighted average of 4 previous sales days. The trend determines “how” sales are spread hourly throughout the day – it does not determine what you projection should be.
- ✦ **Projections:** This area will be populated with you sales proejctions for the week – the projected sales wil be “spread acrtoss the hours within the day based on your trend.
- ✦ **Special Even / Promotions:** You may attach comments to sales days about coupon drops, holidatys, etc. to better inform future trends. Special Events can be added through the Labor tab.
- ✦ **Use Trend:** This button allows you to use your trend as your projection. While this is a good starting point, you must still adjust your projections by what you anticipate happening in the future.
- ✦ **Trend Dates Tab:** This tab allows you to select which 4 previous sales days will be used to create your trend.
- ✦ **Daily Projections Tab:** This is where you will enter your projections for the week.
- ✦ **Day Part Projections Tab:** This tab allows you to enter projections in specific day parts, rather than have daily projections spread according tio you trend.
- ✦ **Detail Projection Tab:** This tab allows you to enter projections in 30 minnte increments to help smooth sales when trend dates have unusual spikes and dips in sales.

Projection Date	Trend	Projection	Special Events/Promotions	<input type="checkbox"/> Completed	<input type="checkbox"/> Approved
Wednesday 09/16/2020	2,180			<input type="checkbox"/>	<input type="checkbox"/>
Thursday 09/17/2020	1,884			<input type="checkbox"/>	<input type="checkbox"/>
Friday 09/18/2020	2,185			<input type="checkbox"/>	<input type="checkbox"/>
Saturday 09/19/2020	2,091			<input type="checkbox"/>	<input type="checkbox"/>
Sunday 09/20/2020	1,602			<input type="checkbox"/>	<input type="checkbox"/>
Monday 09/21/2020	1,749			<input type="checkbox"/>	<input type="checkbox"/>
Tuesday 09/22/2020	1,936			<input type="checkbox"/>	<input type="checkbox"/>
Total:	13,627	0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Use Trend

Sales Projections – Trend Dates

Step 1

Begin creating projections by selecting the “Trend Dates” tab – you want to make sure you are using sales days in your trend that are most similar to the week you are creating projections for.

Step 2

The “Default Dates” are populated with the previous 4 weeks of sales data. If you are working on Monday projections – the 4 previous Monday sales amounts are used.

Step 3

Remove days from the “Default Dates” by highlighting, then using the up arrow to eliminate them from your trend.

Step 4

Bring additional days down to your trend from the top section by highlighting and using the down arrow.

Step 5

Notice how comments will help you select appropriate days – in the example below you would not want to use Labor Day sales in your future trend.

Step 6

Select the “More Dates” tab to search additional sales days. Always use 4 days in your trend – this will help smooth out hourly sales.

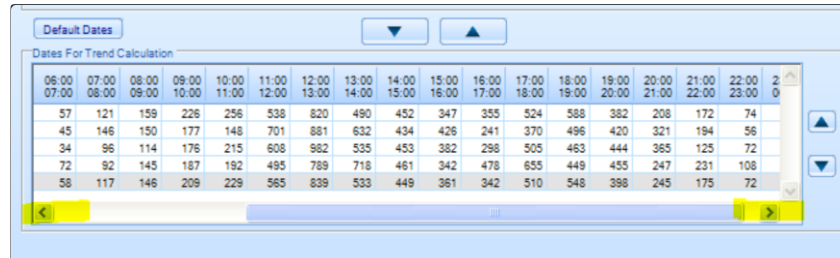
Step 7

Select trend days for each day of the week by using the day of the week tabs – Monday, Tuesday, etc.

The screenshot shows a software interface with several tabs: "Trend Dates", "Daily Projections", "Day Part Projections", and "Detail Projections". The "Trend Dates" tab is active, showing a grid of dates from Friday 11/18/2016 to Thursday 11/17/2016. Below this, there are two data tables. The first table, titled "Prior Dates", has columns for Date, Sales, Weather, Special Events/Promotions, Comments, and BusDate. It lists dates from 9/26/2016 to 8/22/2016, with sales values ranging from 4,877 to 6,324. A comment for 9/5/2016 says "labor day". The second table, titled "Default Dates", also has columns for Date, Sales, Weather, Special Events/Promotions, Comments, and BusDate. It lists dates from 10/24/2016 to 10/3/2016, with sales values ranging from 5,882 to 6,204. A "Trend" row is highlighted with a value of 5,871. At the bottom, there are "OK" and "Cancel" buttons.




Step 8

You can view the hourly sales for trend days by using the left & right arrows or by sliding the task bar on the bottom of the sales projections box.



06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00	2
57	121	159	226	256	338	820	490	452	347	355	524	588	382	208	172	74		0
45	146	150	177	148	701	881	632	434	426	241	370	496	420	321	194	56		
34	96	114	176	215	608	982	535	453	382	298	505	463	444	365	125	72		
72	92	145	187	192	495	789	718	461	342	478	655	449	455	247	231	108		
58	117	146	209	229	565	839	533	449	361	342	510	548	398	245	175	72		

Tips

-  Use similar sales days in your trend
-  Use 1st of the month sales days if you are projecting the first of the month
-  Use coupon drop days if you have a coupon drop coming up, etc.

Sales Projections – Adjusting Projections

Step 1

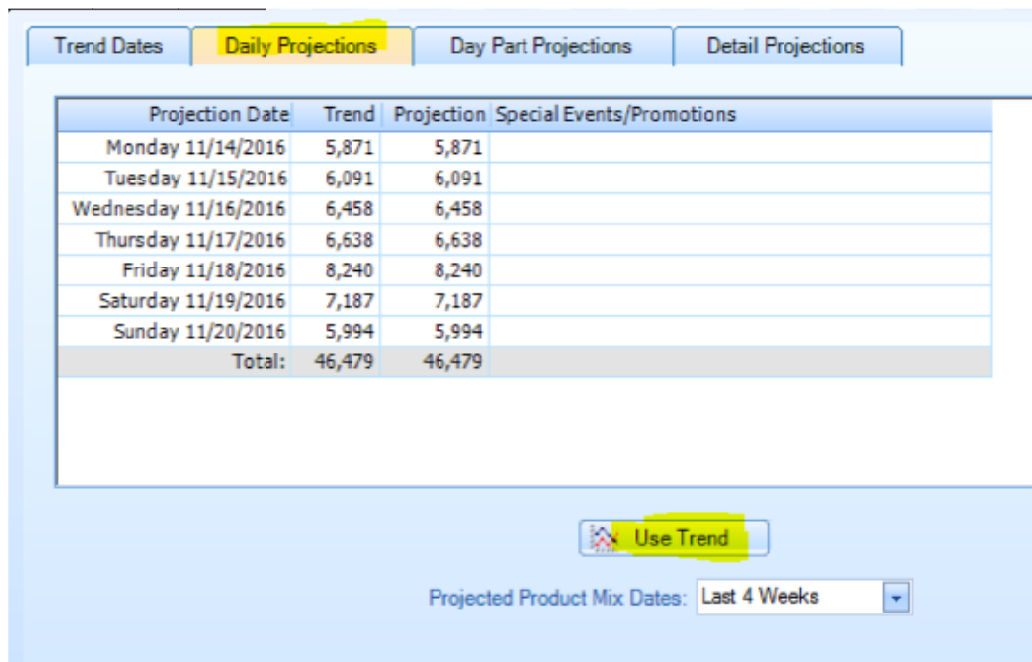
Once you have reviewed and selected correct trend dates, select the “Daily Projections”: Tab to create projections for the week.

Step 2

Select the “Use Trend” button to move the trend sales amounts over to the “Projection” column.




Step 3

Adjust the Projection amount based on your estimate of the future sales.



Projection Date	Trend	Projection	Special Events/Promotions
Monday 11/14/2016	5,871	5,871	
Tuesday 11/15/2016	6,091	6,091	
Wednesday 11/16/2016	6,458	6,458	
Thursday 11/17/2016	6,638	6,638	
Friday 11/18/2016	8,240	8,240	
Saturday 11/19/2016	7,187	7,187	
Sunday 11/20/2016	5,994	5,994	
Total:	46,479	46,479	

Tips

-  Remember that trend sales are an average of the past. Your projections should be based on an aggressive (but not unrealistic) estimate of future sales. For example, if a trend includes a \$3000 day and a \$2000 day, it will result in a trend of \$2500. Using the trend will not prepare you for another \$3000 day.
-  Keep the following in mind when projections sales: promotions, seasonality, holidays, 1st & 15th of the month (paydays), local events and weather.
-  Changes to sales under the Projections column will spread the sales hourly according to the days used in your trend.

Step 4

To adjust sales projection to specific day parts, select the “Day Part Projections” tab.

Step 5

Add sales to specific day parts based on the business you anticipate, such as after school snack sales, breakfast promotions, etc.

Step 6

When you add or subtract sales to day parts, the new total will be reflected back on the “Daily Projections” tab.

Projections for 7166 Wyomissing (Period 11, Week 4, Ending 11/20/2016)

Day Part	Monday 11/14/2016	Tuesday 11/15/2016	Wednesday 11/16/2016	Thursday 11/17/2016	Friday 11/18/2016	Saturday 11/19/2016	Sunday 11/20/2016
Breakfast 6-10	530	625	633	671	691	708	429
Standard 10-2	2,166	2,147	2,326	2,219	2,831	2,360	2,180
Standard 2-8	2,608	2,759	2,927	3,026	3,635	3,341	2,944
Off Peak 8-9	245	254	301	303	432	357	217
Late-Night 9-6	322	306	271	419	651	421	224
Total:	5,871	6,091	6,458	6,638	8,240	7,187	5,994

The “Detail Projections tab is used to smooth half-hourly sales throughout the day.

Step 7

In the example to the right, half hourly sales on Tuesday seem out of sync with typical traffic patterns compared to Monday and Wednesday. You may choose to bump up sales from 1:30 to 2:00 and drop a few dollars in sales from 2:00 to 2:30 to match sales flow from other days in the week.

Time Frame	Monday 11/14/2016	Tuesday 11/15/2016	Wednesday 11/16/2016	Thursday 11/17/2016	Friday 11/18/2016	Saturday 11/19/2016
12:30 PM - 01:00 PM	367	367	401	369	551	
01:00 PM - 01:30 PM	270	376	369	356	430	
01:30 PM - 02:00 PM	263	222	308	326	517	
02:00 PM - 02:30 PM	220	260	173	273	301	
02:30 PM - 03:00 PM	229	179	238	224	225	
03:00 PM - 03:30 PM	195	210	201	148	188	
03:30 PM - 04:00 PM	166	182	183	171	242	
04:00 PM - 04:30 PM	172	214	162	239	265	
04:30 PM - 05:00 PM	170	208	258	252	346	
05:00 PM - 05:30 PM	229	236	256	240	351	
05:30 PM - 06:00 PM	281	274	367	357	305	
06:00 PM - 06:30 PM	284	291	348	352	421	
06:30 PM - 07:00 PM	264	232	286	314	357	
07:00 PM - 07:30 PM	231	250	225	247	343	
07:30 PM - 08:00 PM	167	223	230	209	291	
08:00 PM - 08:30 PM	140	167	156	197	220	
08:30 PM - 09:00 PM	105	87	145	106	212	
09:00 PM - 09:30 PM	84	88	99	102	207	
09:30 PM - 10:00 PM	91	60	59	137	170	
10:00 PM - 10:30 PM	30	60	49	59	63	
10:30 PM - 11:00 PM	42	22	28	47	65	

Step 9

When you have completed adding projections, adjusting day part and detail sales amounts, return to the “Daily Projections” tab.

You will notice that adjustments to projections have created projections that are now different from the trend.

Do not click the “Use Trend” button after adjusting projections – that will overwrite all of your work!

To complete projections, click the “OK” button to save and exit.

Projection Date	Trend	Projection	Special Events/Promotions
Monday 11/14/2016	5,871	5,941	
Tuesday 11/15/2016	6,091	6,091	
Wednesday 11/16/2016	6,458	6,650	
Thursday 11/17/2016	6,638	6,700	
Friday 11/18/2016	8,240	8,240	
Saturday 11/19/2016	7,187	7,230	
Sunday 11/20/2016	5,994	6,200	
Total:	46,479	47,052	

Projected Product Mix Dates:

Step 10

To complete projections, click the “OK” button to save and exit.

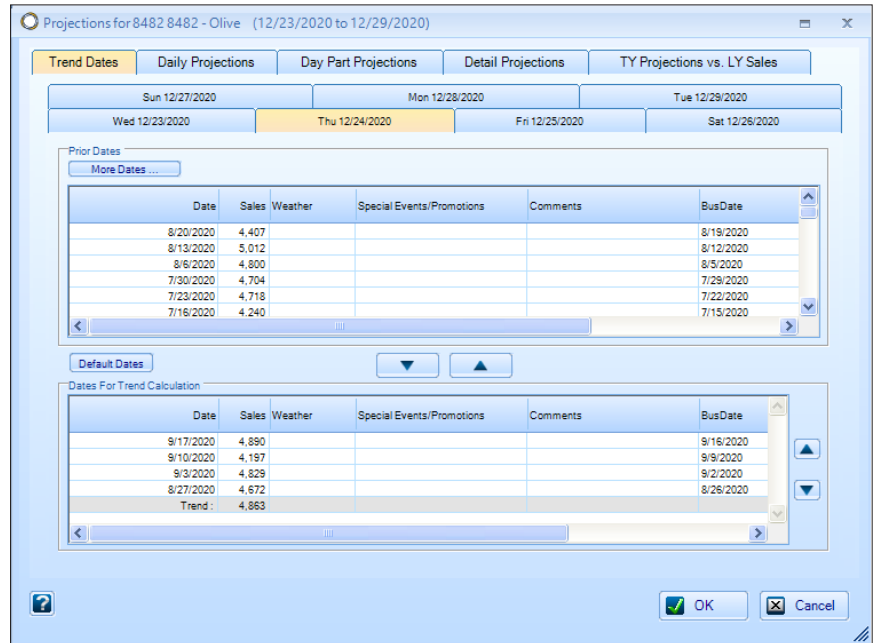
Sales Projections – Recurring Holidays/Special Events

Circumstances arise where you may want to create projections based solely on one specific day from the previous year. A perfect example here would be Christmas Eve. To create accurate projection for this, or another holiday of this type, you will need to change the specific day trend to match just that day from prior year. For an example we will use Christmas Eve.

Step 1

Navigate to the Projections Pop Up Window and select the “Trend Dates” tab.

Select the specific day/date you are adjusting. (Thu 12/24/2020)



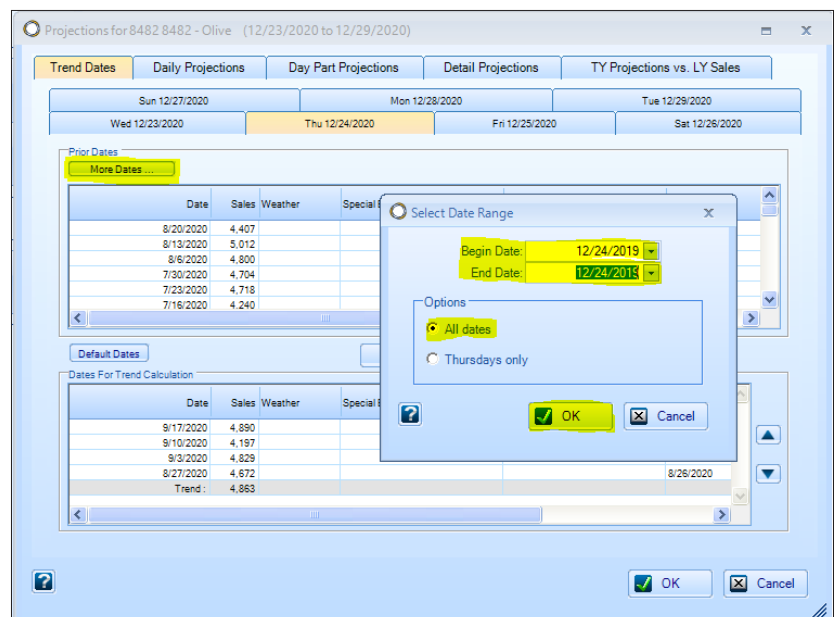
Step 2

Click the “More Dates...” button.

Select the Begin Date AND the End date as the specific date from year prior. (12/24/2019).

Leave the box “All dates” checked.

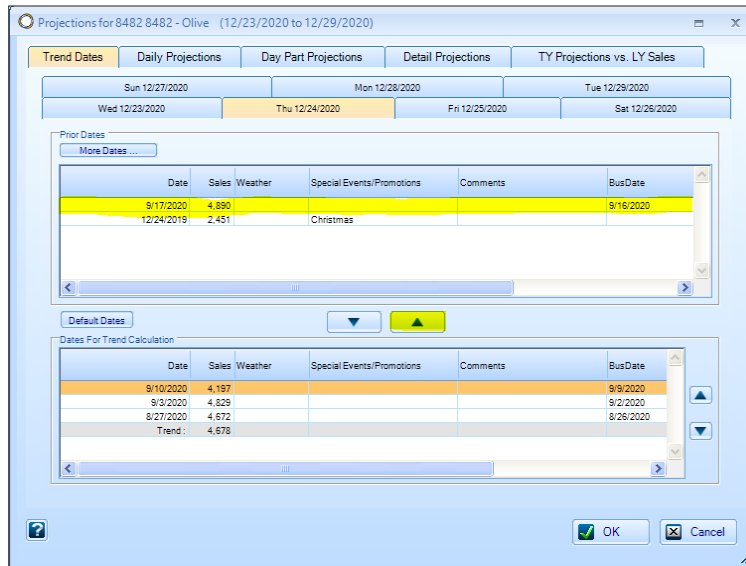
Select “OK”



Step 3

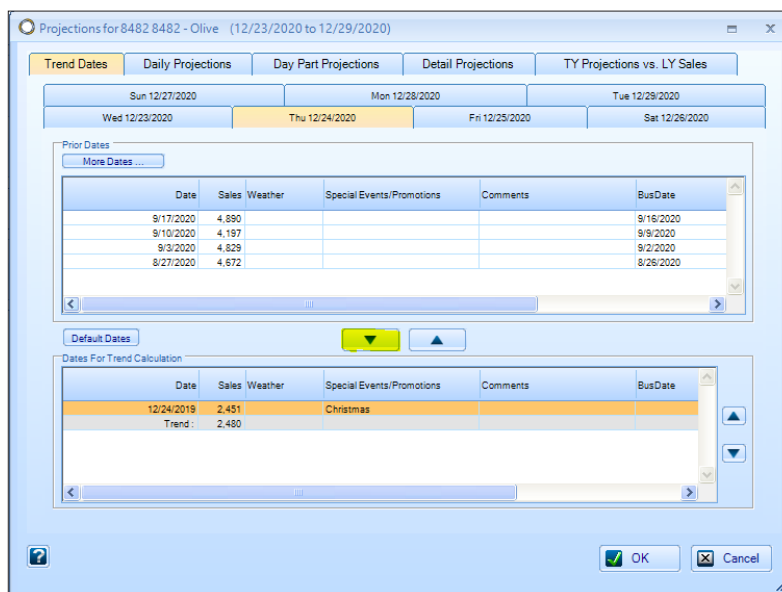
Now you will see that the “Prior Dates” section is populated with only Christmas Eve from the prior year.

In the lower section, titled “Dates for Trend Calculation”, select a line, and then press the “^” arrow centered on the pop-up window. You will see the selected date will move up to the “Prior Dates” section. Do this for each date in the lower section.



Step 4

In the “Prior Dates” Section, select the line containing the date you wish to use, and press the “v” down arrow. This will move the date (Christmas Eve) to the lower section titled “Dates for Trend Calculation”. It should now look like the sample below.



Step 5

Select the “Daily Projections” tab and then “Use Trend”.

Verify the projected sales are now accurate in the tablet and select “OK”

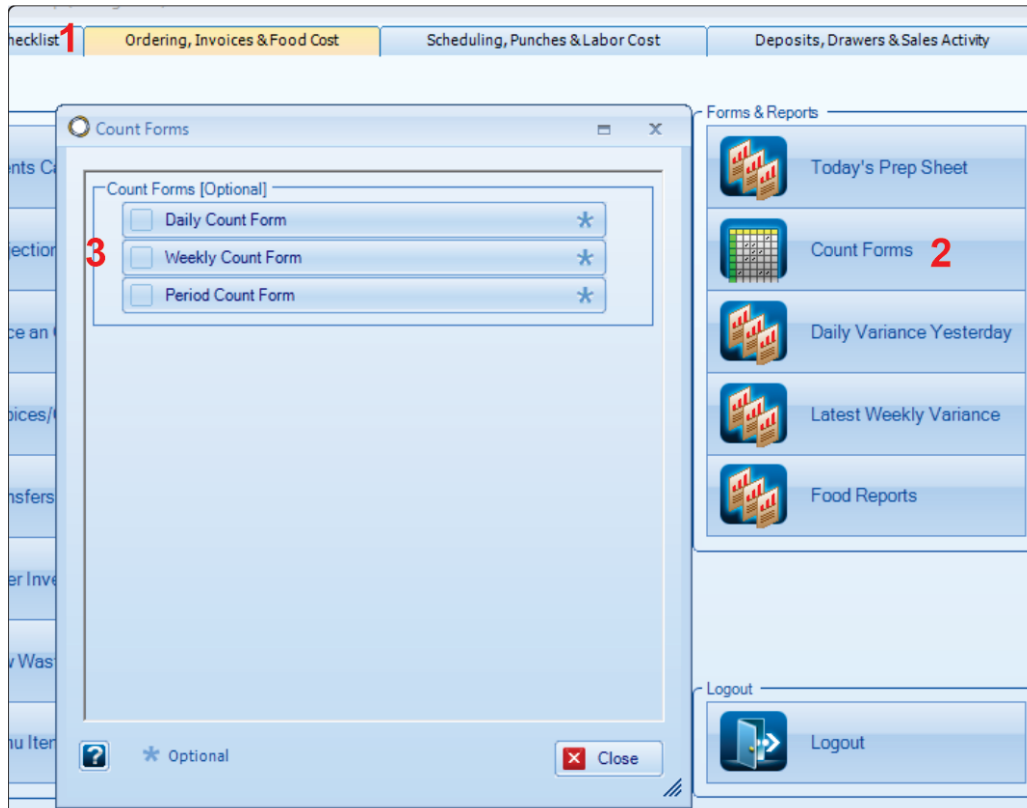
Projection Date	Trend	Projection	Special Events/Promotions	Completed	Approved
Wednesday 12/23/2020	4,293	4,293		<input type="checkbox"/>	<input type="checkbox"/>
Thursday 12/24/2020	2,480	2,480		<input type="checkbox"/>	<input type="checkbox"/>
Friday 12/25/2020	4,801	4,801		<input type="checkbox"/>	<input type="checkbox"/>
Saturday 12/26/2020	3,495	3,495		<input type="checkbox"/>	<input type="checkbox"/>
Sunday 12/27/2020	3,123	3,123		<input type="checkbox"/>	<input type="checkbox"/>
Monday 12/28/2020	3,575	3,575		<input type="checkbox"/>	<input type="checkbox"/>
Tuesday 12/29/2020	4,291	4,291		<input type="checkbox"/>	<input type="checkbox"/>
Total:	26,058	26,058		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Finally, verify again that all Projections are now visible on the “Projections” pop-up window.

Inventory – Printing Count Sheets

Step 1

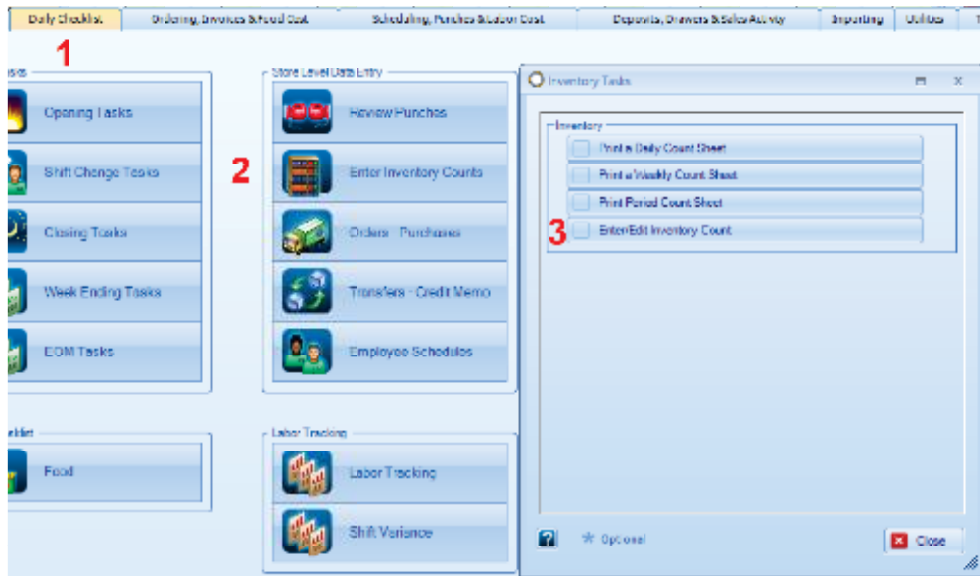
From the (1) “Ordering, Invoices & Food Cost” tab select (2) “Count Forms”, then print the (3) Daily, Weekly, or Period count sheet.



Inventory – Entering Counts

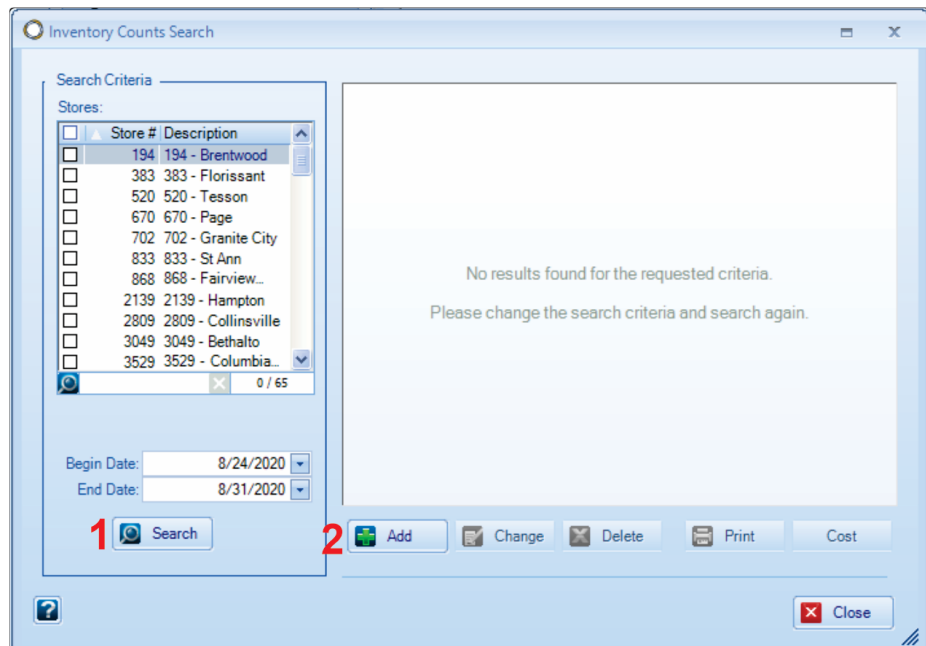
Step 1

From the (1) “Daily Checklist” tab, select (2) “Enter Inventory Counts”, then select (3) Enter/Edit Inventory Count



Step 2

Select the date range and then choose (1) “Search” to preview counts, or you can add new counts by pressing (2) “Add” button.



Step 3

When entering a new count, first choose the correct type of counts: (1) Period, Weekly, or Daily. Counts will populate for each of the categories: (2) Freezer, Walk-in Cooler, Dry Storage, Front Counter, Paper, Supplies, and Toys.

Item	Count	Unit Price
Item : Fries - Shoestring - 3 item(s)		
Case		36.00 Lbs./Case
Bag		6.00 Lbs./Bag
Lbs.		1 Lbs./Lbs.
Item : Patty - Fish - 3 item(s)		
Case		180.00 Each/Case
Bag		18.00 Each/Bag
Each		1 Each/Each
Item : Onion Rings - 2 item(s)		
Case		35.00 Lbs./Case
Bag		2.50 Lbs./Bag
Item : Croissant - 3 item(s)		
Case		150.00 Each/Case
Tray		30.00 Each/Tray
Each		1 Each/Each
Item : Bun - Potato - 3 item(s)		

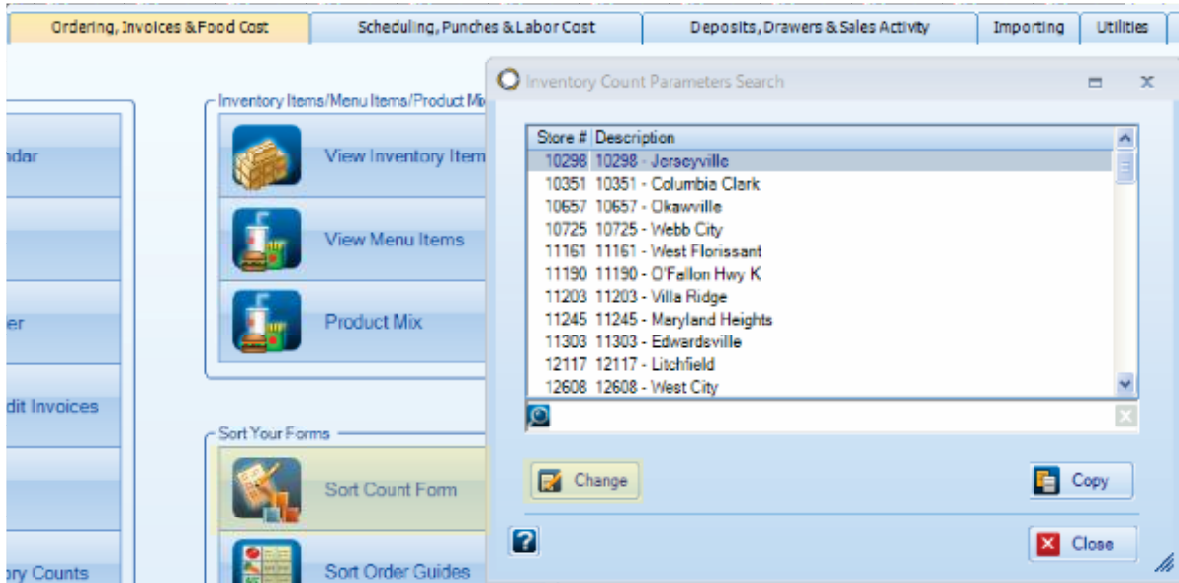
Tips

- ✚ If “Adding” a new count on a day that counts already exist, you will be asked if you would like to overwrite the old counts. You can overwrite to start over, or you can hit the “Change” button to edit previous counts.
- ✚ Only enter counts for items you have on inventory – it is not necessary to enter zeros.
- ✚ If items appear in two places, such as freezer and cooler, the system will add inventory counts from each storage area together – enter the actual amount found in each area.
- ✚ Remember to enter counts for all areas.

Inventory – Customizing Inventory Count Sheets

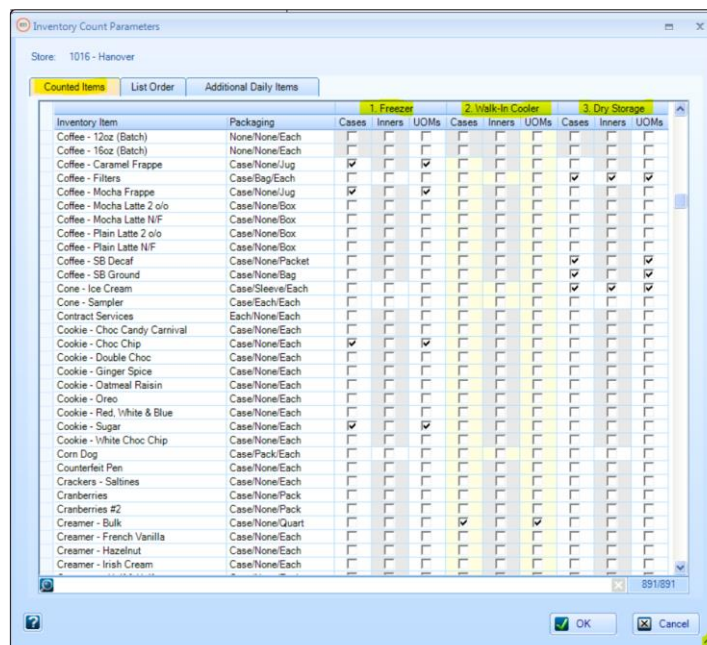
Step 1

From the “Ordering, Invoices & Food Cost” tab, select “Sort Count Form”, then press the “Change” button.



Step 2

The “Inventory Count Parameters” box will pop up. From the “Counted Items” tab, you can select which items show up on your inventory count sheets by checking or un-checking the appropriate boxes.



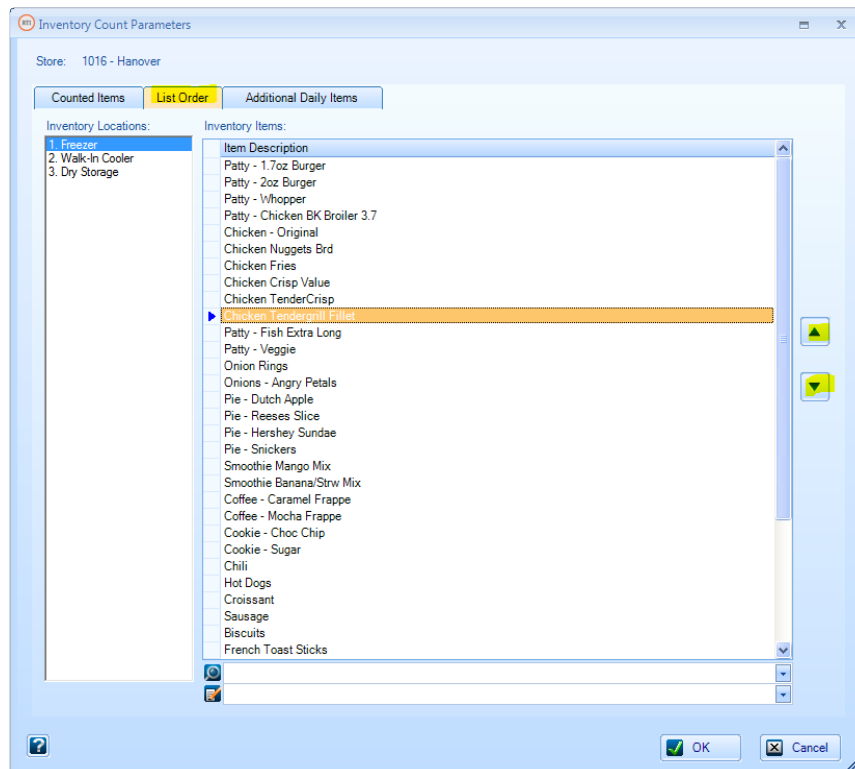
Step 2 cont.

Tips

- Use the “handle on the bottom right corner to expand the view to show all storage areas.
- Click boxes for each unit of measure (UOM) you want to inventory. e: Cas/Bag/Each

Step 3

To arrange the order of your count sheets, select the (1) “List Order” tab. Highlight the inventory item you wish to move (2), then use the up and down arrows to move it to the location where the item will appear when you print your count sheet..



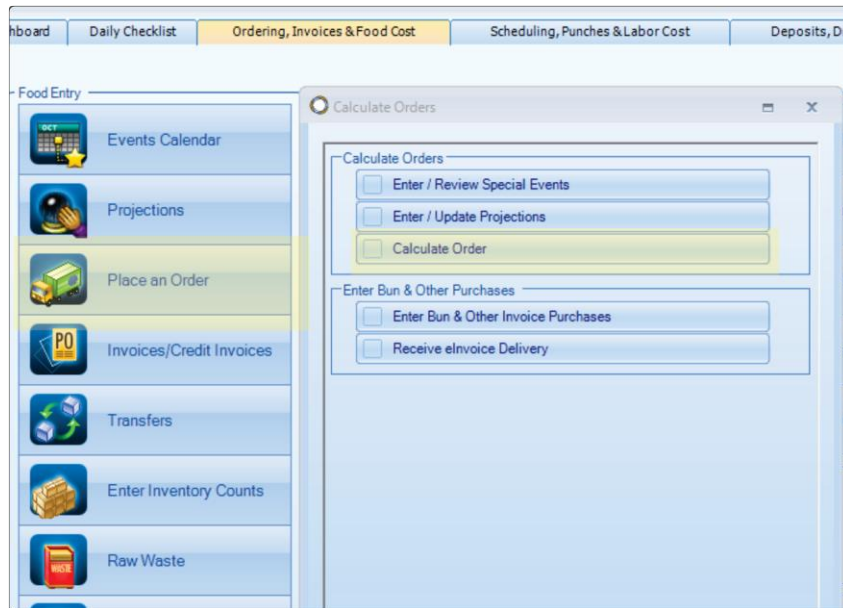
Tips

- You may also select an item, then use your mouse to “drag & drop” the location of the item.
- If you see items you do not need to inventory, then go back to the “Counted Items” tab and un-check the item to remove it from the count sheets.
- Remember to organize the count sheet for all locations.
- Press “OK” to save your list and exit.

Food – Calculating a Truck Order

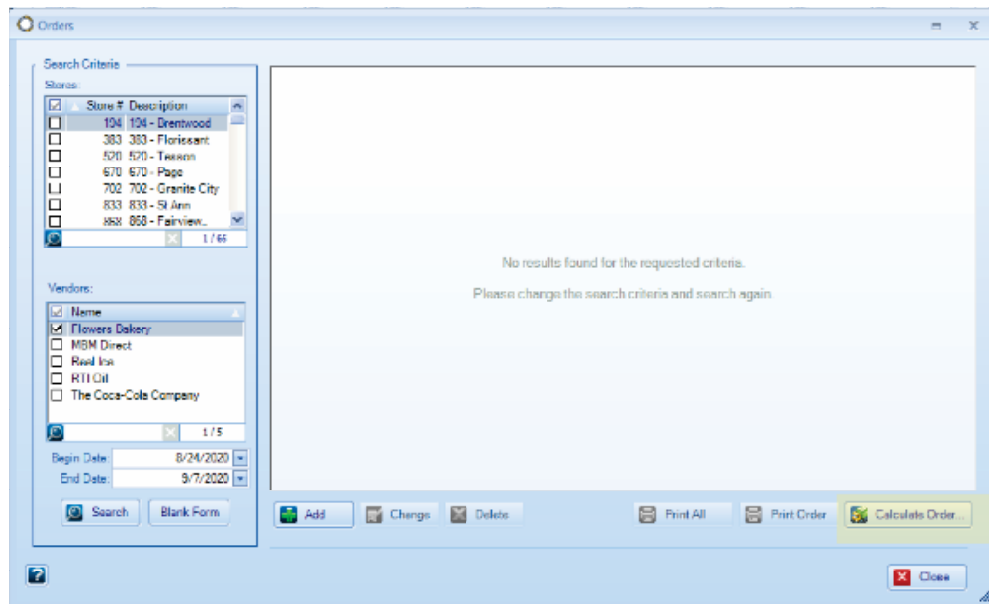
Step 1

From the “Ordering, Invoices & Food Cost” tab, select “Place and Order”, then “Calculate order”.



Step 2

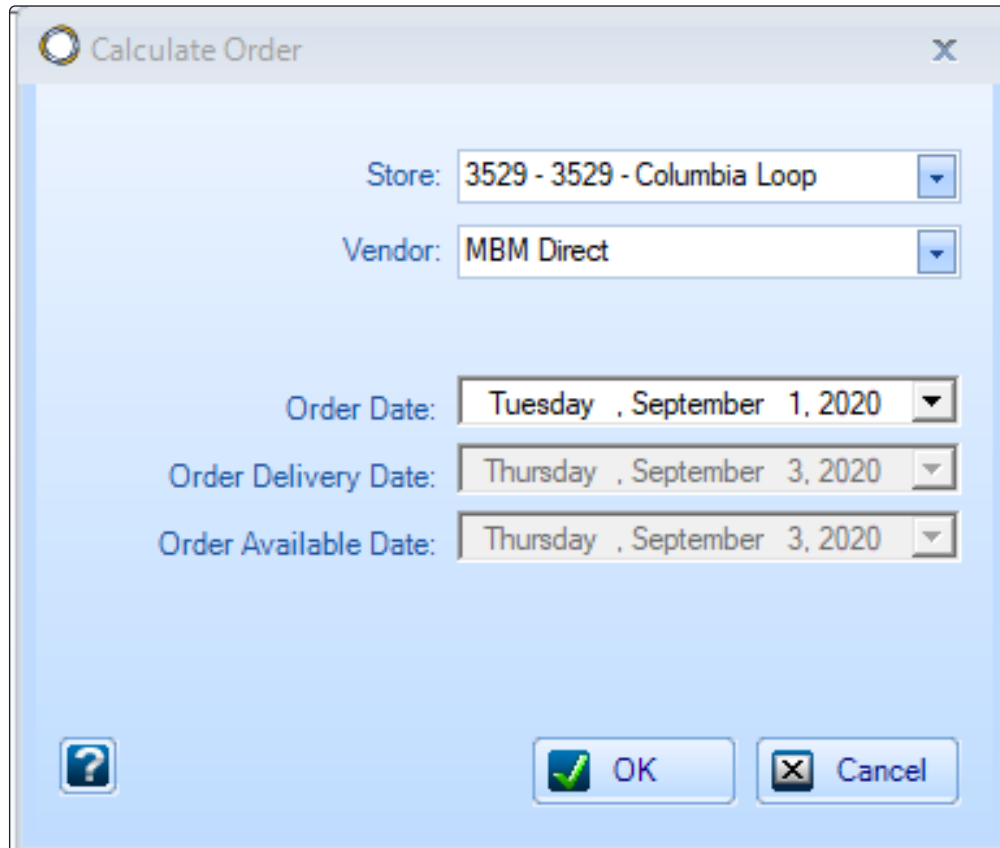
On the “Orders” pop up window, select “Calculate Order”



Step 3

Verify the order date and delivery date is correct. (Note: if order/delivery days are not correct, open a ticket with RTI requesting an update with the correct order and delivery days of the week.

Select "OK" to calculate an order.



Tips

- ✚ If you forget to place your order within the required time frame, your previous order will automatically be reshipped to you.
- ✚ Calculate Order accuracy is based on correct information in RTI: Complet & accurate inventories, all invoices & transfers received, and sales projections entered cfro current week and next week.
- ✚ If you submit an order after your order Date deadline, call the distributor to verify they have received the order.

Calculate Order Screen

- ✦ **Order/Delivery/Available Dates:** These dates should match the days/dates from the previous “Calculate Order” screen. Do not use the drop downs to change these dates from this screen.
- ✦ **Status:** This is for information only. Do not use the drop downs to change the status.
- ✦ **Calc Qty (Calculate Quantity):** This is the estimate of how much product you should order – accuracy is based on information in the RTI system: inventory, invoices, projections, etc.
- ✦ **Qty (Quantity):** This column shows the actual number of cases that will be ordered. **Enter your order in this column.** Note that the total pieces are shown at the bottom of the Qty column.
- ✦ **Item Drop Downs:** The drop down tabs are used to search the entire order guide and are typically used on blank lines to search for items not listed.
- ✦ **Search Function:** Can be used with a “dot search” to quickly find items in the order guide. For example, to search Whopper you can type ..whop then press enter.
- ✦ **View:** Allows you to toggle between viewing the entire order guide or just the items that will be ordered.
- ✦ **Print All / Print Order:** A best practice is to print the order before sending. The print sheets will show the on-hand inventory that is used to validate the order amounts.
- ✦ **Send Order:** This button will transmit the order to the distribution center.

Change Order

Store: Pearl Nix Vendor: Reinhart Food Service - ATL Order Date: 10/31/2016

Delivery Date: 11/2/2016 Available Date: 11/2/2016 Status: Not Placed

Item	Vendor Item	Calc Qty	Qty	Cost	Total Amount	UOM/Case
Knife Plastic Board	KNIFE PLST BOARD 10 (E1096)	0.00	0.00	\$10.9900	\$0.00	1 Each / Each
Biscuits	BISCUIT SOUTHERN STYLE BK (D9964)	3.23	3.00	\$15.7600	\$47.28	180 Each / Case
Bun - Brioche Style	BUN 4 BRIOCHE STYLE (E6122)	0.00	0.00	\$20.2400	\$0.00	120 Each / Case
Chicken - Original	CHICKEN PATTY BRD RAW (42492)	0.00	0.00	\$47.6900	\$0.00	144 Each / Case
Chicken 2.5oz Brk	CHICKEN BRST BRD 2.5 TFF (F0758)	0.00	0.00	\$73.5000	\$0.00	186 Each / Case
Chicken Crisp Value	CHICKEN PATTY VALUE (P7000)	0.00	0.00	\$53.4500	\$0.00	272 Each / Case
Chicken Fries	CHICKEN BREADED FRIES (53302)	0.00	0.00	\$73.9200	\$0.00	1200 Each / Case
Chicken Fries - Cheetos	CHICKEN FRIES CHEESE PUFF (B9408)	0.00	0.00	\$101.7500	\$0.00	1200 Each / Case
Chicken Nuggets Brd	CHICKEN NUGGET SHP BRD (R0166)	0.00	0.00	\$55.0800	\$0.00	944 Each / Case
Chicken TenderCrisp	CHICKEN BREAST 4.7oz -TC (BN828)	0.00	0.00	\$71.7700	\$0.00	136 Each / Case
Chicken Tendergrill Fillet	CHICKEN BREAST 4.0 OZ (V0756)	0.52	1.00	\$110.5600	\$110.56	140 Each / Case
Chili	SAUCE CHILI W/ BEEF (G8384)	0.00	0.00	\$38.5200	\$0.00	480 Oz. / Case
Cinnamon Roll	CINNAMON ROLL BAKED (M0420)	0.00	0.00	\$48.7100	\$0.00	144 Each / Case
Coffee - Caramel Frappe	FRAPPE MIX CARMEL BK 2016 (W4064)	0.00	0.00	\$31.5600	\$0.00	6 Jug / Case
Cookie - Choc Chip	DOUGH CKY CHOCHIP (D5024)	0.51	1.00	\$31.8400	\$31.84	240 Each / Case
Cookie - Red, White & Blue	DOUGH COOKIE CARNIVAL (J4722)	0.00	0.00	\$31.8400	\$0.00	240 Each / Case
Croissant	CROISSANT 2.0 OZ FROZEN (L4362)	2.22	2.00	\$25.4600	\$50.92	150 Each / Case
French Toast Sticks	FRENCH TOAST STICKS (63838)	0.00	0.00	\$16.3700	\$0.00	256 Each / Case
Fries - Shoestring	FRIES COATED 3/8 CUT (A9930)	0.00	0.00	\$23.6500	\$0.00	36 Lbs. / Case
Gravy - Sausage Breakfast	SAUSAGE BRKFST GRAVY FZ (64128)	0.00	0.00	\$17.2400	\$0.00	12 Lbs. / Case
Ham - Country	HAM CNTRY 1.25-1.5oz SL (M7300)	0.00	0.00	\$60.2000	\$0.00	108 Slice / Case
		79.00			\$2,198.91	

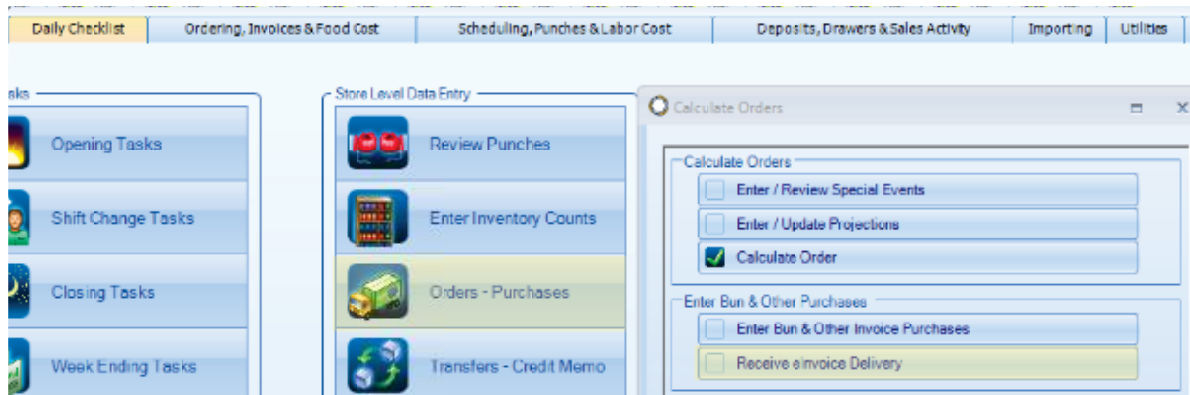
320/320 Edit only the quantity View: All Items

Send Order
 Print All
 Print Order
 OK
 Cancel

Food – Receiving Orders

Step 1

From the “Daily Checklist” tab, select “Orders – Purchases”, then select “Receive eInvoice Delivery”

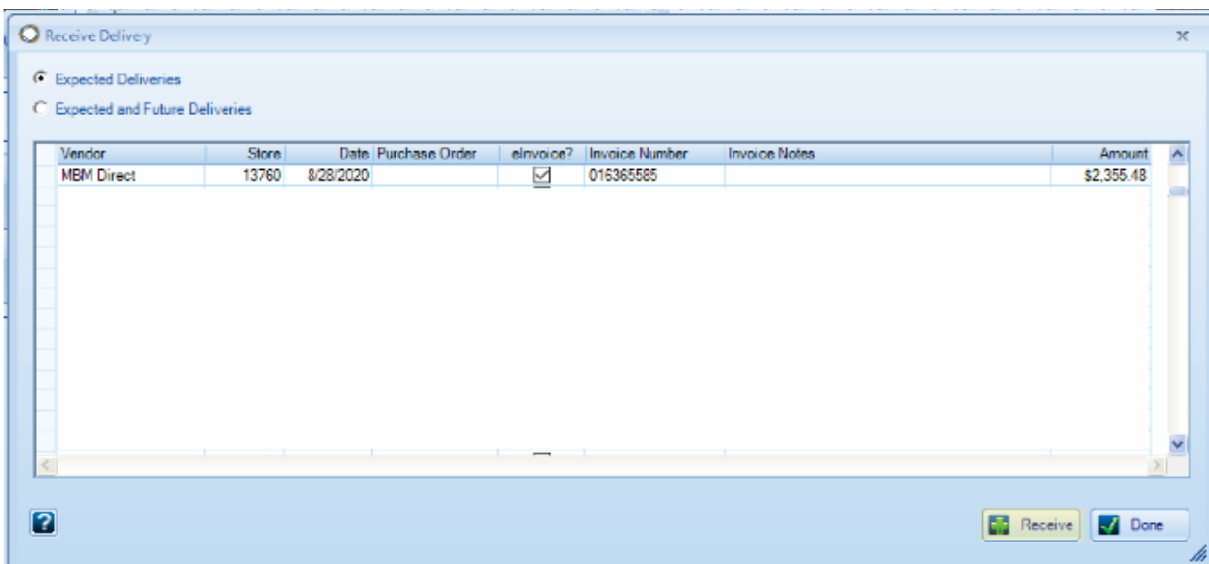


Step 2

All orders that are available to be received will be listed in the pop up box.

Step 3

Click on the order to highlight it, then press the “Receive” button.



Step 4

If all quantities are accurate and the “Balance Amount” matches, simply click “OK” to receive the order. This will add all of the quantities into your inventory and update all item costs.

Step 5

If you need to adjust the quantity (if you did not receive an item or did not accept delivery of an item), then click the “Create Adjustment” button.

Electronic Invoice

Store: Pearl Nix Vendor: Reinhart Food Service - ATL Invoice Date: 10/25/2018 Invoice Number: 670673 Balance Amount: 4500.07

Approved

Item	Qty	Cost	Total Amount	UOM/Case
E6122-Bun - Brioche Style	1.00	\$20.2400	\$20.24	120 Each / Case
F0758-Chicken 2.5oz Brk	1.00	\$73.5000	\$73.50	186 Each / Case
53302-Chicken Fries	1.00	\$73.9200	\$73.92	1200 Each / Case
B9408-Chicken Fries - Cheetos	2.00	\$101.7500	\$203.50	1200 Each / Case
G8384-Chili	1.00	\$38.5200	\$38.52	480 Oz. / Case
A9930-Fries - Shoestring	28.00	\$23.6500	\$662.20	36 Lbs. / Case
M0420-Cinnamon Roll	1.00	\$48.7100	\$48.71	144 Each / Case
D5024-Cookie - Choc Chip	1.00	\$31.8400	\$31.84	240 Each / Case
63838-French Toast Sticks	1.00	\$16.3700	\$16.37	256 Each / Case
C1302-Hashbrowns	3.00	\$18.6100	\$55.83	30 Lbs. / Case
G8842-Hot Dogs	1.00	\$23.7800	\$23.78	80 Each / Case
F4492-Onion Rings	1.00	\$35.0300	\$35.03	35 Lbs. / Case
P4816-Pancakes	1.00	\$13.9400	\$13.94	144 Each / Case
R6418-Pattv - 1.7oz Burger	6.00	\$63.7700	\$382.62	320 Each / Case
	13.00		\$4,500.07	

66/66

 OK Cancel

Good to Know

When you “Create Adjustment” a new invoice will pop up and Invoice Number will match the original invoice, but the letters “ADJ” will be added indicating an adjustment invoice.

- ✚ To remove an item from your inventory, enter a negative number in the Qty column.
- ✚ Once all adjustments have been made, type the Total Amount of adjustments in the “Balance Amount” box.
- ✚ Remember to enter the Balance Amount as a negative number.
- ✚ Once complete, hit the OK button.

Item	Qty	Cost	Total Amount	UOM/Case
E6122-Bun - Brioche Style		\$20.2400		120 Each / Case
F0758-Chicken 2.5oz Brk		\$73.5000		186 Each / Case
53302-Chicken Fries		\$73.9200		1200 Each / Case
B9408-Chicken Fries - Cheetos		\$101.7500		1200 Each / Case
G8384-Chili		\$38.5200		480 Oz. / Case
A9930-Fries - Shoestring	-1.00	\$23.6500	(\$23.65)	36 Lbs. / Case
M0420-Cinnamon Roll		\$48.7100		144 Each / Case
D5024-Cookie - Choc Chip		\$31.8400		240 Each / Case
63838-French Toast Sticks		\$16.3700		256 Each / Case
C1302-Hashbrowns		\$18.6100		30 Lbs. / Case
G8842-Hot Dogs		\$23.7800		80 Each / Case
F4492-Onion Rings		\$35.0300		35 Lbs. / Case
P4816-Pancakes		\$13.9400		144 Each / Case
R6418-Patty - 1.7oz Burger		\$63.7700		320 Each / Case
	-1.00		(\$23.65)	

Tips

- ✚ Electronic invoices are available in RTI on the day your order is delivered, typically by 2:00PM.
- ✚ The delivery driver will provide a copy of the invoice so you check in the order.
- ✚ To add all of the inventory items in RTI, you will simply “Receive Truck Order”.

Food – Entering Purchases

Entering Purchases are done when a vendor does not provide electronic invoices.

Step 1

From the “Daily Checklist” tab, select “Orders – Purchases” then Enter Bun & Other Invoice Purchases.

When the “Purchase Search” window pops up, press “Add” to add a new purchase.

Step 2

Once you select “Add” you may select the vendor from the drop down tab. This will determine the category on the Invoice Register the item will be counted towards.

Step 3

Complete the Invoice Date, Invoice Number, and Balance Amount.

Step 4

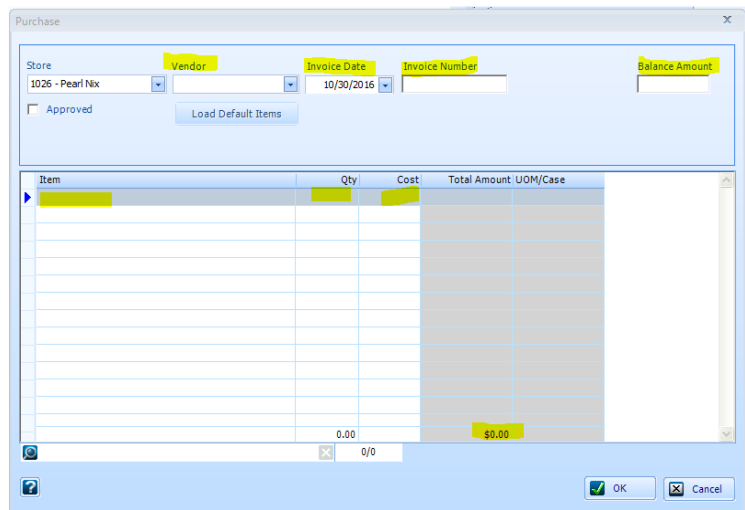
Use the drop down tab on the first line under the Item column to select an item to add, then type in the correct Qty and Cost received.

Step 5

Add additional lines until the entire invoice is entered.

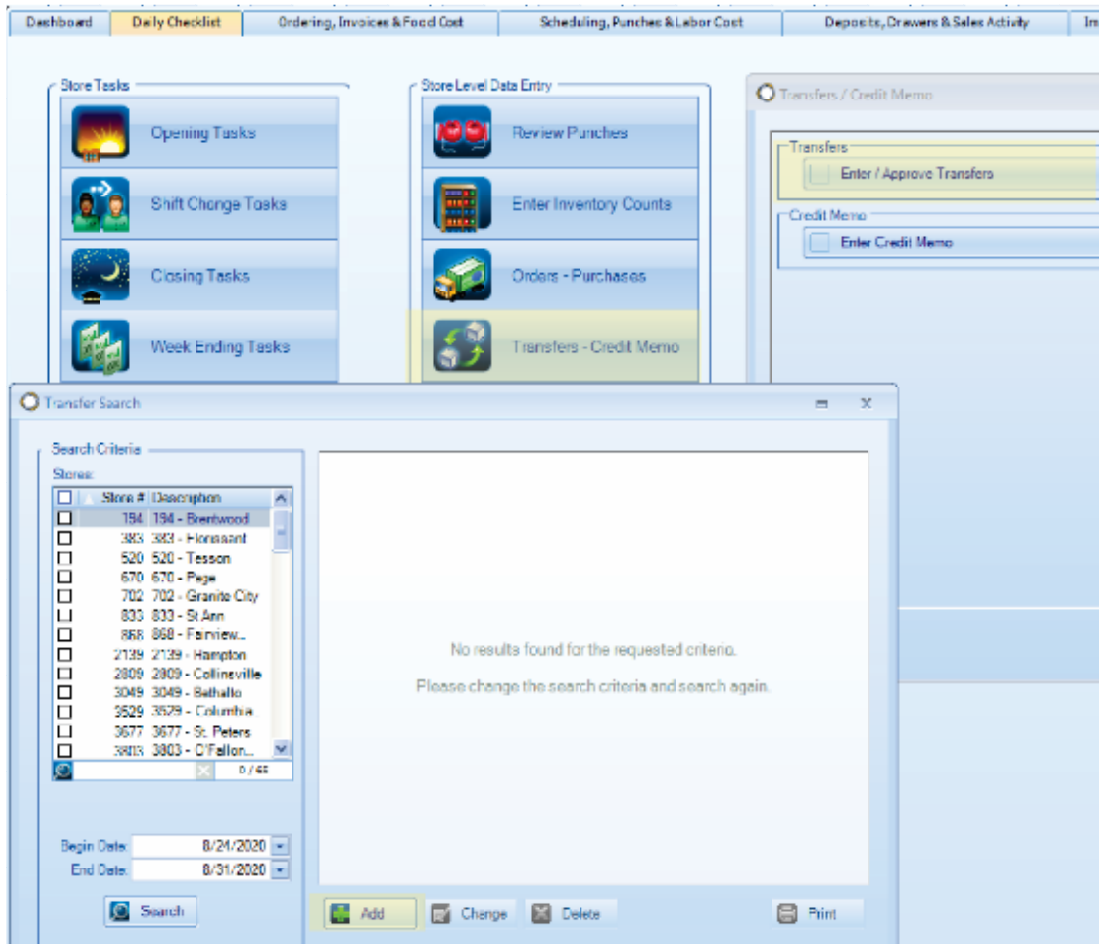
Step 6

Ensure the Balance Amount matches the Total Amount. Click OK to complete.



Step 1

From the “Daily Checklist” tab select “Transfers – Credit Memo”, then “Enter / Approve Transfers”.



Step 2

Select the date of the transfer from the drop down. In the “From” column select the store you are sending the transfer from.

Step 3

In the “To” column, select the store you are sending the transfer to, then choose the item from the drop down menu in the “Item” column.

Under “Item” you can also search by keyword. Use the following format to find your item: “..chicken”, or “..patty”. Be sure to always use the two periods prior to the keyword or the search will not work.

Date	From	To	Item	Order Unit Qty	Order Unit	Inner Pack Qty	Inner Pack	UOM Qty	UOM	Total Qty
10/30/2016	323 White Hall	1026 Pearl Nix	Patty - Whopper	1.00	Case (144.00 Each)				Each	144.00

Step 4

Enter a comment, such as the persons name who is receiving the product.

If you do not complete this step, you will be unable to move forward in the process.

Order Unit Qty	Order Unit	Inner Pack Qty	Inner Pack	UOM Qty	UOM	Total Qty	Cost	Override	Calc. Cost	Total	Comments
1.00	Case (144.00 Each)				Each	144.00	0.4538	<input type="checkbox"/>	0.4538	65.3472	Received by Ben

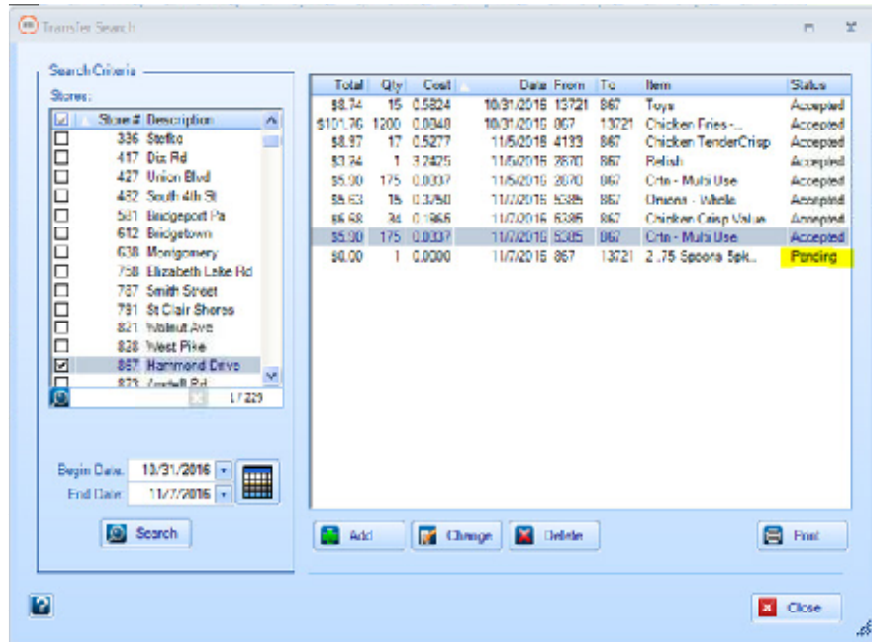
Step 5

Click “OK” to finish the transfer.

Food – Receiving a Transfer

Step 1

From the “Daily Checklist” tab select “Tranfers – Credit Memo”, then “Enter / Approve Transfers”.
 Select the “Pending Transfer” by double-clicking on it.

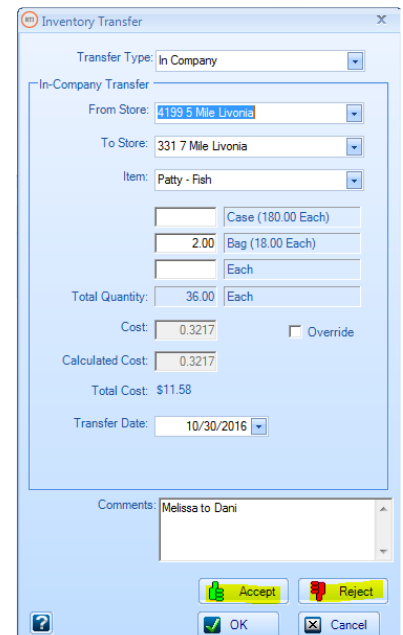


Step 2

An Inventory Transfer box will pop open. Click “Accept” or “Reject”.

Accept will remove the item from the sending restaurant’s inventory and add the item to the receiving restaurant’s inventory.

If Reject is selected, add a comment with the reason for rejection.



Food – Entering Waste

There are two different methods to track / record waste: menu waste and raw waste.

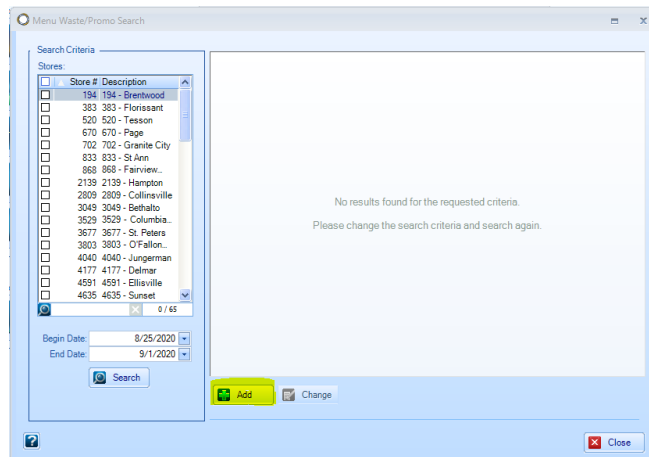
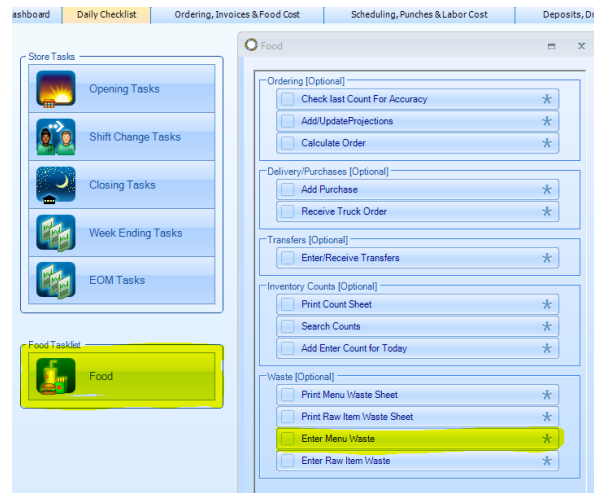
NOTE: Waste does not impact your food variance – it is a toll to help you identify opportunities to lower food cost.

For proper waste management, please reference the RTI food variance reporting and waste management guide.

1. Menu Waste tracks complete sandwiches and menu items, such as Whoppers, Double Cheese Burgers, Original Chicken Sandwiches, etc.
2. Raw Waste tracks individual ingredients, such as tomatoes, onions, burger patties, buns, etc.

Step 1

To track Menu Waste, select the “Daily Checklist” tab, “Food Tasklist”, and then scroll down to the Waste section, select “Enter Menu Waste”, and then select “Add” on the “Menu Waste/Promo Search” pop up window.



Step 2

Enter the amount of sandwiches or menu items under the “Waste Column”.

Select “OK” when completed.

Menu Item	Waste
Bac Chz Burger	
Big Fish	
Biscuit - Sausage	
Burrito EggNormous Egg	
Burrito HB Value Sau Egg Chs	
Chicken Crisp Jr	
Chicken Fries - 9pc	
Chicken Fries Pretzel - 9pc	
Chicken Nuggets - 10pc	
Chz Burger	
Crispy Chicken	
Crispy Chicken Bac	

Step 3

To track Menu Waste, select the “Daily Checklist” tab, “Food Tasklist”, and then scroll down to the Waste section, select “Enter Raw Waste”, and then select “Add” on the “Menu Waste/Promo Search” pop up window.

Dashboard | **Daily Checklist** | Ordering, Invoices & Food Cost | Scheduling, Punches & Labor Cost | Deposit

Store Tasks

- Opening Tasks
- Shift Change Tasks
- Closing Tasks
- Week Ending Tasks
- EOM Tasks

Food Tasklist

- Food

Food

Ordering [Optional]

- Check last Count For Accuracy *
- Add/Update Projections *
- Calculate Order *

Delivery/Purchases [Optional]

- Add Purchase *
- Receive Truck Order *

Transfers [Optional]

- Enter/Receive Transfers *

Inventory Counts [Optional]

- Print Count Sheet *
- Search Counts *
- Add Enter Count for Today *

Waste [Done]

- Print Menu Waste Sheet *
- Print Raw Item Waste Sheet *
- Enter Menu Waste
- Enter Raw Item Waste

Step 3 cont.

Ingredients are tracked by the UOM (Unit of Measure) listed in the UOM column (example: each, pound, pouch, etc.).

Select "OK" when completed.

Raw Waste/Promo

Store: 9518 - Manchester Date: 9/1/2020 Time: 07:45 AM
Business Date: 9/1/2020

Inventory Item	UOM/Case	UOM/Inner Pack	Raw Waste (UOMs)
Apple Juice	40 Each / Case	10 Each / Pack	
Bacon - Thick Cut	1080 Slice / Case	180 Slice / Sleeve	
Bag - Taco	1000 Each / Case		
Biscuits	180 Each / Case		
Bun - Brioche Style	120 Each / Case	12 Each / Bag	
Bun - Hamburger 4 inch	30 Each / Tray		
Bun - Potato	100 Each / Case	25 Each / Bag	
Bun - Pretzel	48 Each / Case	6 Each / Bag	
Bun - Specialty	24 Each / Tray		
Bun - Whopper - 5 inch	20 Each / Tray		
Cheese - Mozzarella	256 Slice / Case	64 Slice / Pack	
Cheese - Shaved Parmesan	6 Lbs. / Case		
Cheese - Shred Ched	12 Bag / Case		
Cheese - Sliced American	1600 Slice / Case	200 Slice / Loaf	
Cheese - Sliced Cheddar	640 Slice / Case	160 Slice / Block	
Chicken Breast Crispv	146 Each / Case	18.25 Each / Bao	

OK Cancel

Labor – Adding New Team Members

New team members are entered into RTI automatically from the electronic onboarding process with Snagajob. RTI imports files in the morning. Manually entering a team member will prevent the file from importing. It can cause payroll and time clock errors. You should never manually enter an employee. It is best to complete onboarding a day or two before the team member’s start date to allow time for the file to be imported. Once the team member file is established, you will still need to update team member information, such as clock-in numbers and department codes.

Step 1

From the “Scheduling, Punches & Labor Cost” tab click the “Employee Maintenance” icon.

Step 2

Select the “Employee Status” of Active and Inactive team members. If more than 100 matches are in the system, only the first 100 will show – type in the First or Last name, then “Search”.

Step 3

Select the Employee’s name and click “Change”.

The screenshot shows the 'Employee Search' window in the RTI software. The 'Scheduling, Punches & Labor Cost' tab is selected. The 'Employee Search' window has the following fields and options:

- Search criteria:
 - First Name: []
 - Last Name: []
 - State: (All States) [v]
 - Employee ID: []
- Employee Status:
 - Active
 - Inactive
 - Terminated
- Search Options:
 - Search ALL stores
 - Search only 'My Stores'
 - Search specific store: []

The Search Results table is as follows:

First Name	Last Name	Home Phone	Mobile Phone
Daniel	Anderson	(636) 723 - 7384	
Angela	Armstrong		
LaToya	Austin	1(618) 971 - 1092	
Janell	Ball	(314) 666 - 4874	
Kimberly	Ballinga	(314) 420 - 7239	
Victoria	Banks	(314) 480 - 2215	
Meghan	Bennett		(618) 802 - 5565
Laura	Bird	(618) 806 - 0954	
Brittney	Bird	(618) 540 - 5056	
Courtney	Bormida	(217) 320 - 5353	
Testone	Broadway		
Kayleigh	Brown	(314) 609 - 9722	
Andrew	Brown	(618) 977 - 3565	
Natalie	Burton	(618) 978 - 4553	
Donovan	Butler		(314) 201 - 7993
Brandon	Calvin	(314) 782 - 9897	(314) 374 - 4373
James	Chedester	(314) 428 - 3703	
Kiara	Chester		(618) 709 - 3431
Carlos	Childress	(618) 514 - 3310	
Sherryce	Clark	(314) 489 - 6198	
Tosha	Clines	(618) 409 - 6755	

At the bottom of the results table, there is a 'Change' button and a message: "There are more than 100 matches. The first 100 are displayed. Refine criteria and search again."

Step 4

The “Departments and Pay” tab must be completed with the correct department.

General Stores Availability Availability Exceptions Fixed Schedules Departments and Pay Time Cards						
Store	Department	Pay Rate	Pay Rate Time Frame	Effective Date	Default	
833 833 - St Ann	TEAM		Hourly	12/25/2019	<input checked="" type="checkbox"/>	...
					<input type="checkbox"/>	...
					<input type="checkbox"/>	...
					<input type="checkbox"/>	...
					<input type="checkbox"/>	...

Choices are “Team”, “Shift”, “FirstA”, “SecondA”, “GM”, and “QGM”.

- + **Team:** Crew Members
- + **Shift:** Shift Managers
- + **FirstA:** Salaried Assistant Managers
- + **SecondA:** Hourly Assistant Managers
- + **GM:** Salaried General Managers
- + **QGM:** Hourly General Managers

Step 5

The “Time Cards” tab must be completed as follows:

- + **Time Card Number:** This is the number the team member uses to clock in on the POS. Ensure the exact same number is entered into Aloha or SICOM. Typically, this is the last 4 of the team member’s social security number. If the last four digits starts with a “0”, then you must change it to a new number.
- + **Department:** Use the drop down feature to select the same department code identified under the “Departments and Pay” tab.

General Stores Availability Availability Exceptions Fixed Schedules Departments and Pay Time Cards		
Store	Time Card Number	Department
833 833 - St Ann	1234	TEAM

Labor – Setting Up Team Members in SICOM

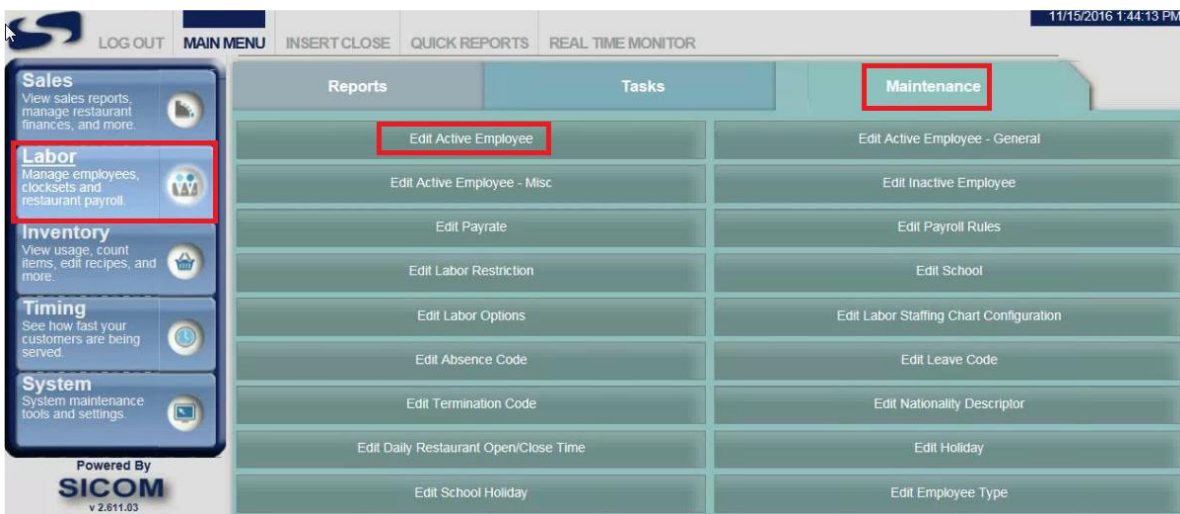
Onboarding new employees will automatically set them up in RTI, but the new employee must also be manually added to the the POS so they can clock in. The key items to add are the employee name, time card number and department code. All of these itmes must match the RTI employee srestup to get vvalid time punches.

Step 1

Log into SICOM from the back office computer.

Step 2

Select the “Labor” icon, then select the “Maintenance” tab. From the maintenance menu you will select “Edit Active Employees”.



Step 3

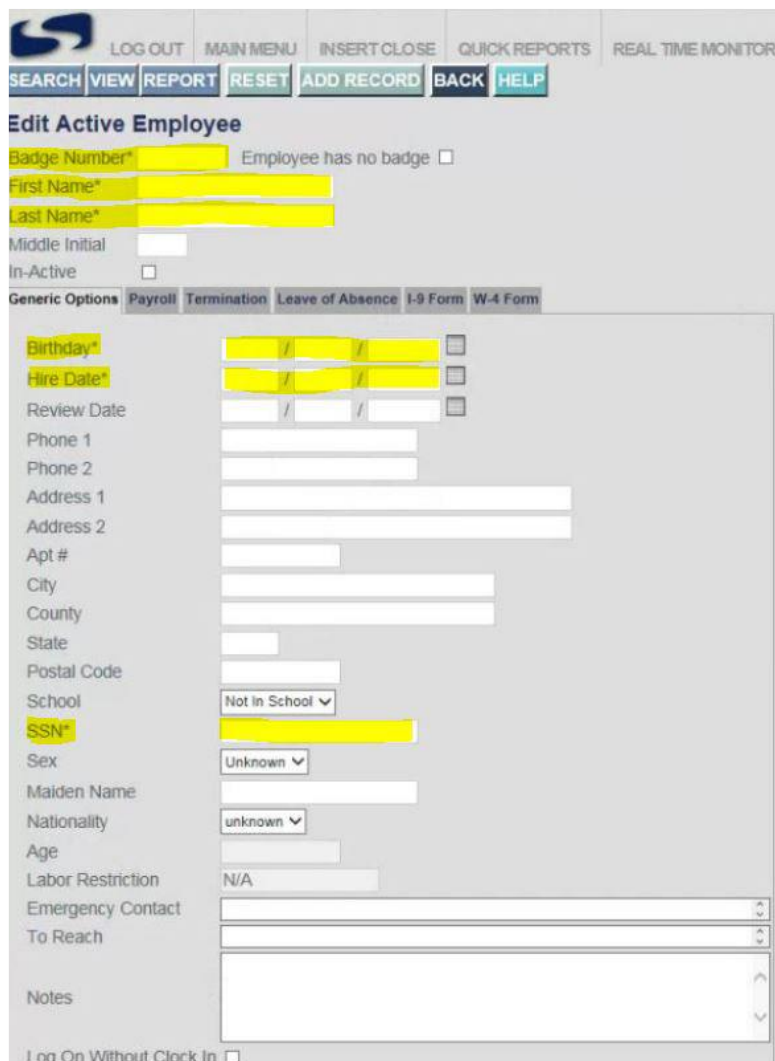
Select “New” to add a new team member.



Step 4

From the “Edit Active Employee” box, you will complete the following information from the “Generic Options” tab:

- **Badge Number** - This is the team member’s 4-digit clock in number, typically the last 4 digits of their social security number. NOTE: This number cannot begin with a zero and MUST match the timecard number you entered in RTI.
- **First Name**
- **Last Name**
- **Birthday**
- **Hire Date**
- **SSN** – Enter the full social security number, not just the last 4 digits.



LOG OUT MAIN MENU INSERT CLOSE QUICK REPORTS REAL TIME MONITOR

SEARCH VIEW REPORT RESET ADD RECORD BACK HELP

Edit Active Employee

Badge Number* Employee has no badge

First Name*

Last Name*

Middle Initial

In-Active

Generic Options Payroll Termination Leave of Absence I-9 Form W-4 Form

Birthday*

Hire Date*

Review Date

Phone 1

Phone 2

Address 1

Address 2

Apt #

City

County

State

Postal Code

School

SSN*

Sex

Maiden Name

Nationality

Age

Labor Restriction

Emergency Contact

To Reach

Notes

Log On Without Clock In

Step 5

From the “Payroll” tab, complete the following information:

- **Payroll ID:** This is the team member’s 4-digit clock in number – the exact same number you entered under the “Badeg Number” in the previous screen.
- **Payroll Rule:** Select “Burger King (Store #)” from the drop down. For example, store 4040 would select Burger King 4040 from the drop down menu.
- **Jobs:** Select the appropriate job title from the drop down.
- **Pay Rate:** You may enter \$.01 to keep this rate confidential (actual rates of pay are maintained in payroll).

To complete the setup, press the “Add Record” button.

Jobs	Pay Rate*	Proficiency
Crew		
Hourly Indirect-Porter		
Salary General Manager		
Shift Leader		
Assistant Manager		
Hourly General Manager		

Tips:

Job codes in SICOM must match the corresponding job code in RTI. Job code and RTI Assignment matching is as follows:

RTI	Sicom Jobcode
Team	Crew / Team Member
Shift	Shift Leader
SecndA	2 nd Assistant
FirstA	1 st Assistant
QGM	Hourly General Manager
GM	General Manager

Labor – Setting Up Team Members in Aloha

Onboarding new employees will automatically set them up in RTI and Payroll, but the new employee must also be manually added to the POS so they can clock in. The key items to add are the employee name, time card number, and department code. All of these items must match the RTI employee setup to get valid time punches.

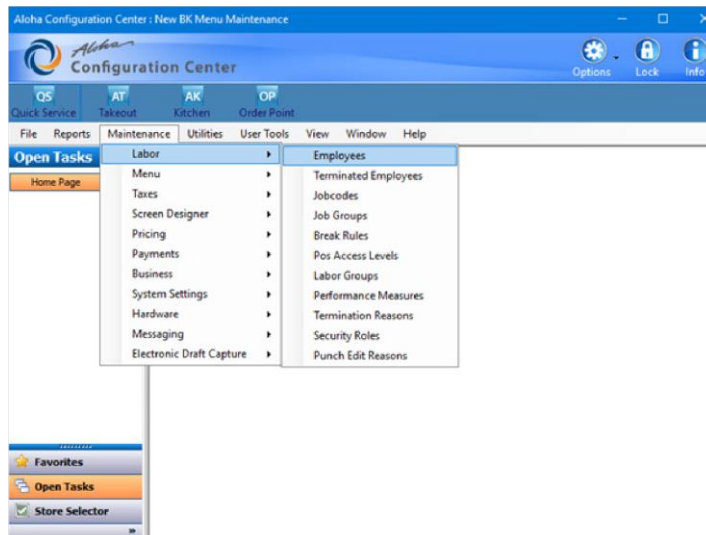
Step 1

Log in the Aloha Configuration Center from the back office computer.



Step 2

Select the “Maintenance” tab, then navigate to “Labor”, then “Employees”.

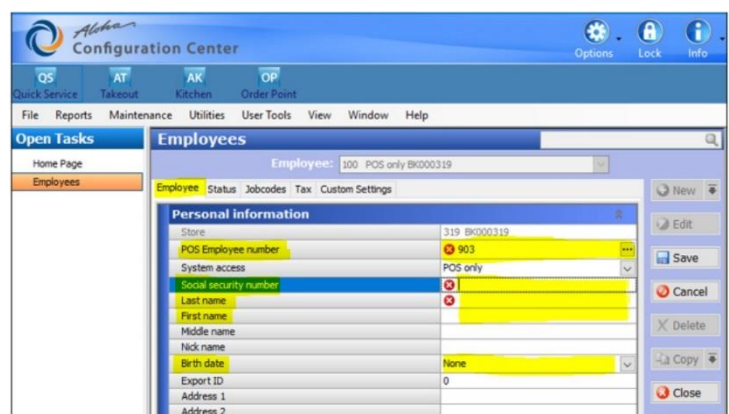


Step 3

From the “Employees” task box, select the “New” button from the right hand column. Note: select “POS Only” under “system access”.

Enter the following information under the Employee tab:

- **POS Employee Number** (4-digit clock in number)
- **Social Security Number**
- **First Name**
- **Last Name**
- **Birth Date**



Step 4

From the “Status” tab, complete the following information:

- **Employee status:** Select “Active”
- **Job Status:** Select Full time
- **Start Date:** Enter the start date

Step 5

From the “Job codes” tab, select “Add” then complete the following information:

- **Job code**
- **Access Level**
- **Pay Rate**

Tips:

Job codes in Configuration Center must match the corresponding job code in RTI. Job code and Access Level matching is as follows:

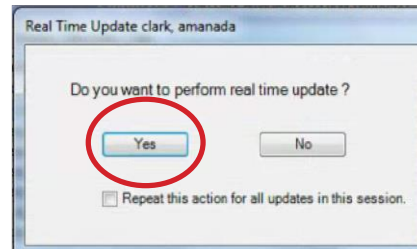
RTI	Config Jobcode	Access Level
Team	TM Cashier	Cashier
Shift	Shift Coor	Shift Mgr
SecndA	Shift Coor	Asst Mngr
FirstA	Asst. Mngr	Asst Mngr
QGM	Vacation Pay	GM
GM	GM	GM

Step 6

To “Save” the new team member, select the “Save” button from the right hand column on the screen.

You will be prompted to perform a Real Time update. Select YES.

It may take 10-15 minutes before the new employee profile is available in the Aloha registers and available to clock in.



Labor – View / Edit Time Punches

Team members clock in/out using the register, then the time punch data is imported into RTI.

Changes to current day time punches are made in the register, then re-imported into RTI.

Changes to prior day time punches are made in RTI by using the “Edit Time Punches” button.

Step 1

From the “Scheduling, Punches & Labor Cost” tab, select “Edit Time Punches”

Step 2

The “Punch Processing” box will open allowing you to “Search” all time punches within the selected time frame.

- Days that include all valid punches will be checked “Valid”.
- Days that include invalid time punches will be highlighted.
- **“Add A Day Manually” should not be used! This will delete all time punches & over-write all of the scheduled hours.**

Step 3

To edit time punches, select the day, then press the “Change” button.

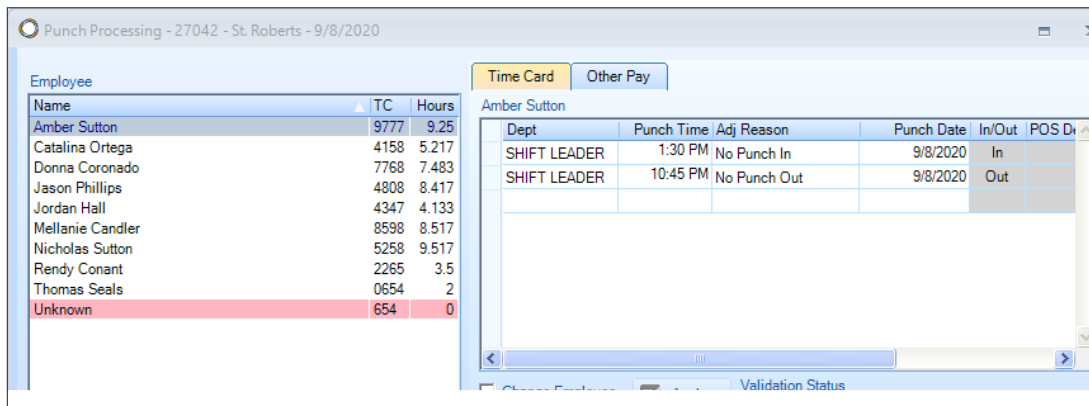
Store #	Name	Date	Valid	Actual Hours	Sched Hours
27042	27042 - St. Roberts	8/31/2020	✓	54.2	63
27042	27042 - St. Roberts	9/1/2020	✓	61.117	62
27042	27042 - St. Roberts	9/2/2020	✓	66.167	68.5
27042	27042 - St. Roberts	9/3/2020	✓	64.633	65.75
27042	27042 - St. Roberts	9/4/2020	✓	68.617	68
27042	27042 - St. Roberts	9/5/2020	✓	68.317	69
27042	27042 - St. Roberts	9/6/2020	✓	67.867	67
27042	27042 - St. Roberts	9/7/2020	✓	60.7	38
27042	27042 - St. Roberts	9/8/2020	✗	58.033	63
27042	27042 - St. Roberts	9/9/2020	✗	8.417	54

Step 4

A new box will pop up showing the daily totals. All of the team members with time punches will be listed on the left. The team member selected will have their hours shown on the right side.

Step 5

Team members with invalid punches will be highlighted – notice the “Unknown” employee in the example below:



Employee				Time Card						
Name	TC	Hours		Dept	Punch Time	Adj Reason	Punch Date	In/Out	POS Dr	
Amber Sutton	9777	9.25		SHIFT LEADER	1:30 PM	No Punch In	9/8/2020	In		
Catalina Ortega	4158	5.217		SHIFT LEADER	10:45 PM	No Punch Out	9/8/2020	Out		
Donna Coronado	7768	7.483								
Jason Phillips	4808	8.417								
Jordan Hall	4347	4.133								
Mellanie Candler	8598	8.517								
Nicholas Sutton	5258	9.517								
Rendy Conant	2265	3.5								
Thomas Seals	0654	2								
Unknown	654	0								

Step 6

There are several reasons a time punch will be invalid:

- “Unknown”
- “Invalid Department”
- “Unbalanced Punches”

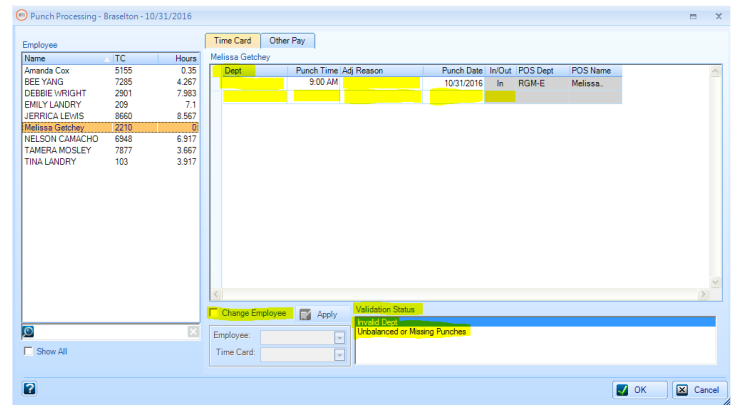
Note: You can run a Punch Exceptions report to view all invalid time punches.

Step 7

To fix an invalid time punch, click to select the employee and review the “Validation Status” area to determine the problem.

There are five sections used to edit time punches:

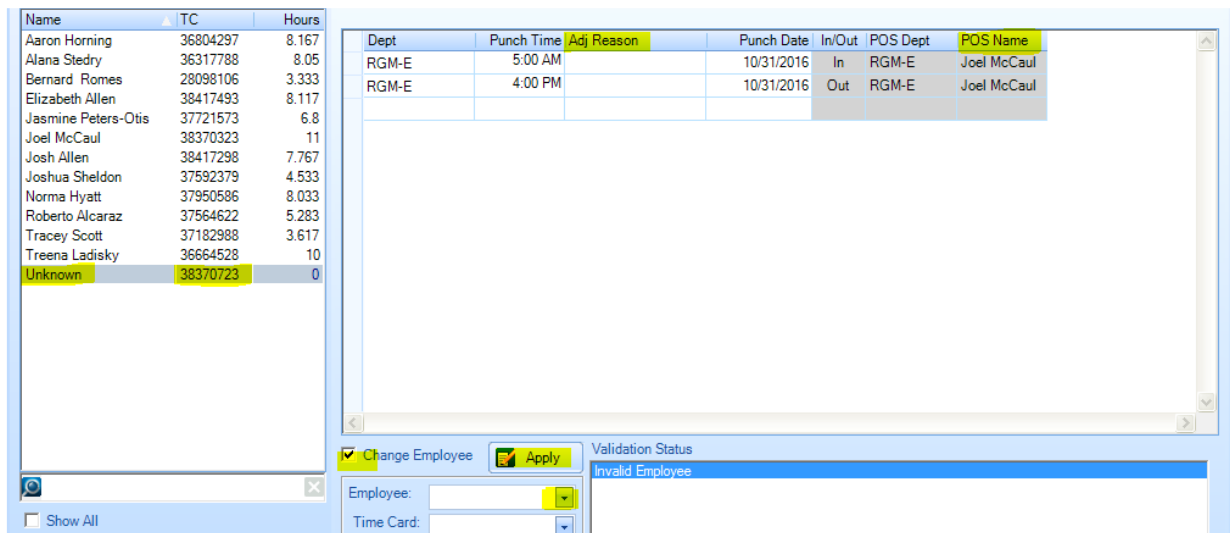
1. Dept
2. Punch Time
3. Adj Reason
4. Punch Date
5. Change Employee box.



Fixing “Unknown” Invalid Punches

“Unknown” means that a team member has clocked in to the register, but there is a mismatch in the RTI Employee Detail setup.

1. In the “Edit Time Punches” section, look at the team member name listed under the POS Name – this will identify who has been entered into the POS, but not properly entered into RTI>
2. Go into “Employee Maintenance”, search the team member and review each of the setup tabs to ensure all of the information is correct – especially the time card number (last four of their SS#).
3. Back in the “Edit Time Punches” section, click the “Change Employee” button then use the “Employee” drop down function to find the team member’s name. Once you click their name the “Time Card” will fill in automatically.
4. Adjust the “Adj Reason” drop down to identify a reason for the original error – typically it will be “Administrative”.
5. Click “OK” to complete the time card and return to the daily “Punch Processing” screen. The team member will now be valid.



The screenshot displays two main sections of the software interface. On the left is a list of employees with columns for Name, ITC, and Hours. The 'Unknown' entry is highlighted. On the right is a punch processing table with columns for Dept, Punch Time, Adj Reason, Punch Date, In/Out, POS Dept, and POS Name. Two punch records are visible, both for RGM-E on 10/31/2016, with POS Name 'Joel McCaul'. Below the tables are control buttons: 'Change Employee' (checked), 'Apply', and 'Validation Status' (Invalid Employee). There are also dropdown menus for 'Employee:' and 'Time Card:'.

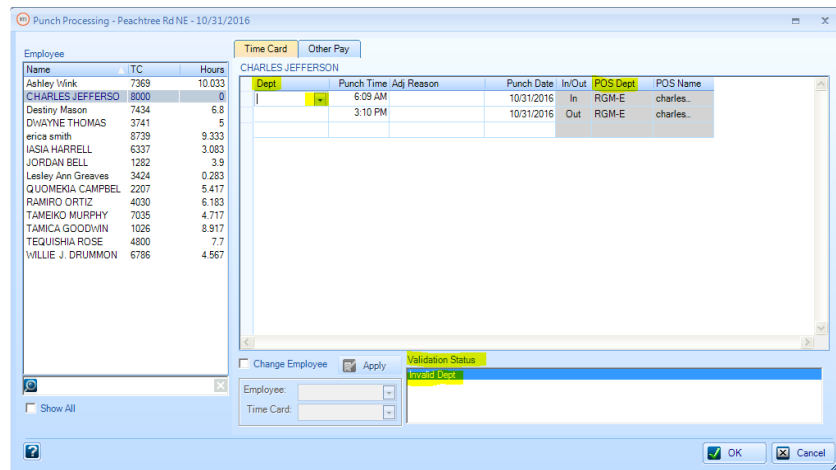
Name	ITC	Hours
Aaron Horning	36804297	8.167
Alana Stedry	36317788	8.05
Bernard Romes	28098106	3.333
Elizabeth Allen	38417493	8.117
Jasmine Peters-Otis	37721573	6.8
Joel McCaul	38370323	11
Josh Allen	38417298	7.767
Joshua Sheldon	37592379	4.533
Norma Hyatt	37950586	8.033
Roberto Alcaraz	37564622	5.283
Tracey Scott	37182988	3.617
Treena Ladisky	36664528	10
Unknown	38370723	0

Dept	Punch Time	Adj Reason	Punch Date	In/Out	POS Dept	POS Name
RGM-E	5:00 AM		10/31/2016	In	RGM-E	Joel McCaul
RGM-E	4:00 PM		10/31/2016	Out	RGM-E	Joel McCaul

Fixing Invalid Department Punches

“Invalid Department” indicates a mismatch between the job code in the register and RTI. You will need to identify if the Job Code (Department) setup error is in the POS or in RTI.

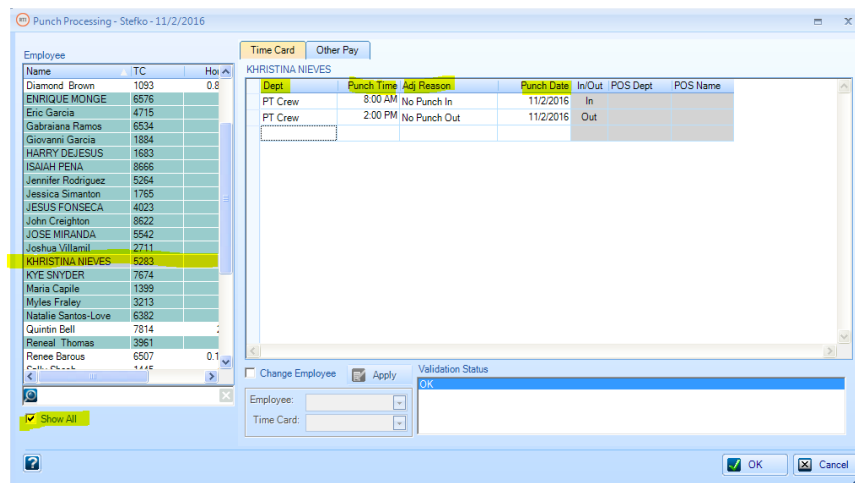
1. In the Punch Processing time card section look at the POS Dept job code to identify what has been entered in the POS.
2. Use the “Dept” drop down to view the Department Code that is entered into RTI.
3. Fix the incorrect POS department code in the POS system or fix the incorrect RTI job code in the “Employee Maintenance” screen.



Fixing Unbalanced Punches

“Unbalanced Punches” identifies and employee who clocked in, but did not clock out.

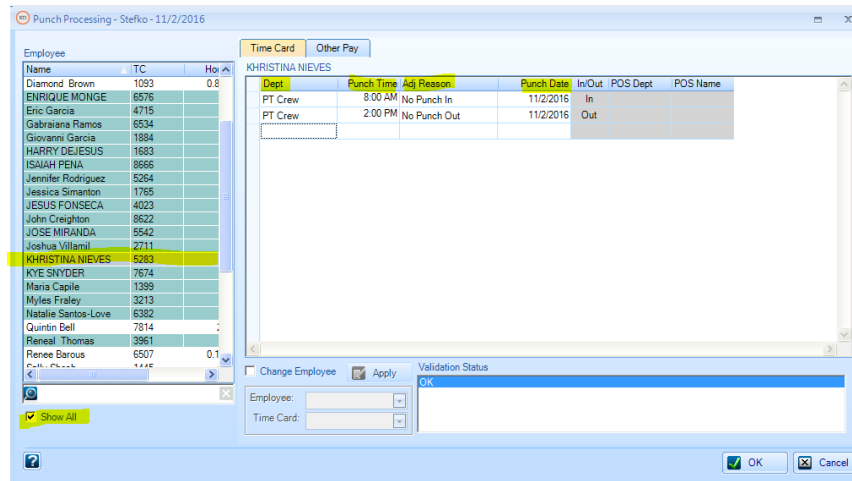
1. In the Punch Processing time card section use the Dept, Punch Time, and Punc Date drop downs to enter the missing time punches.
2. Use the Adj Resason drop down to identify the reason, asuch as “No Punch Out”.
3. Click “OK” to complete the time card and return to the daily Punch Processing screen – the team member should now be valid.



Fixing Missing Time Punches

If a team member has no time punches (if they failed to clock in or clock out), you can add punches manually.

1. In the Punch Processing time card section, click the “Show All” button to view all of the team members.
2. Select the team member you wish to add time punches
3. Use the Dept, Punch Time, Adj Reason and Punch Date drop downs to manually add the punch data.



Creating Schedules

Accurate Projects and excellent schedules are the best way to ensure great guest services and build your sales.

The expectation is to always have enough team members to cover the projected labor while using no more than the allowed hours available each day.

To accomplish this, you will need to use ¼ hour (15 minute) scheduling, and stagger shift start and finish times.

Prior to creating a schedule, make sure you have completed sales projections.

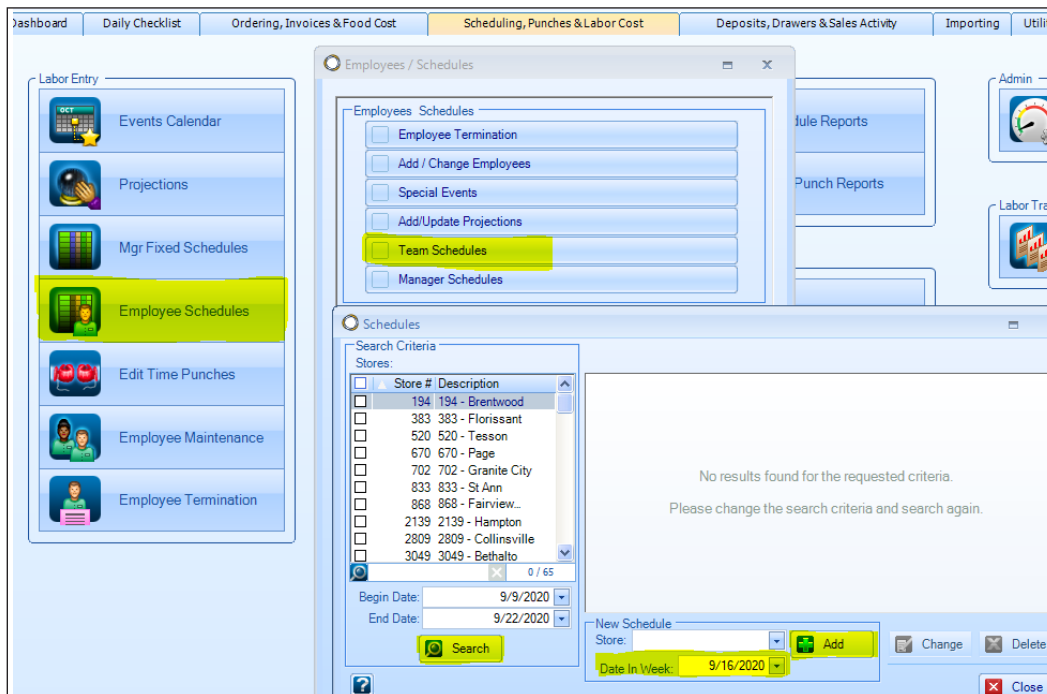
Step 1

From the “Scheduling, Punches & Labor Cost tab”, select “Employee Schedules”, then “Team Schedules”.

NOTE: Always “search” for a schedule prior to “Adding” a new schedule – if a schedule for the time period selected has already been started, you want to “change” the existing schedule. If you “Add” a new schedule for the same week you have already started on it will erase your previous work, a mistake you do not want to make!

Step 2

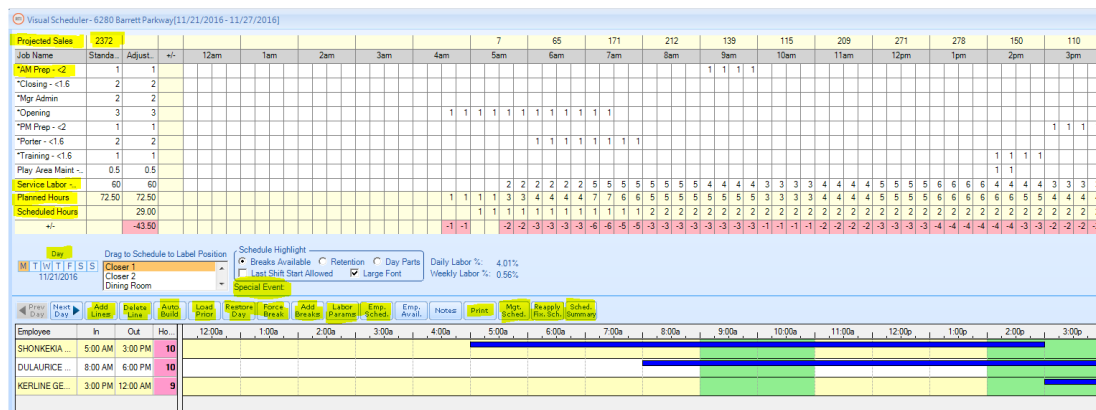
After searching the correct week, if “No results found”, then create a New Schedule by selecting any date with that week and click the “Add” button.



Good to Know

Key parts of the Schedule:

- Projections: Pulled from the Projection section of RTI and spread hourly across the day.
- Job Name: Lists “Indirect / Non-Service” hours available. The hours are pre-populated on the schedule, but they can be used at any time based on the needs of the restaurants.
- Service Labor: Shows the minim number of people based on the needs of the restaurants.
- Service Labor: Shows the minimum number of people that must be scheduled each hour based on the projected sales.
- Planned Hours: Total number of hours allowed based on the projected sales for the day.
- Scheduled Hours: Total number of hours scheduled.
- Day: Shows which day f the week you are working on. Change days by clicking on the appropriate day or by clicking the “next day” button.
- Special Event: Displays any special events that have been entered under the “Labor” tab.
- Add Lines: Allows you to create additional shifts by drawing a line bar on a blank line.
- Delete Line: Allows you to remove a shift.
- Auto Build: Allows the system to create a schedule for you based on the sales projections, Manager Fixed Schedule, and Labor Parameters.
- Load Prior: Allows you to copy a day from a previous week and overwrite the current day you are working on. The current projections will be retained.
- Restore Day: Allows you to start over.
- Force Break: Allows you to schedule a break for an individual team member.
- Add Breaks: Automatically add breaks to every team member meeting the Labor Parameter criteria.
- Labor Parameters: Displays the “rules” use when “Auto Building”: as schedule.
- Employee Schedule: Allows you to view and print heh weekly schedule.
- Print: Allow you to print the current daily bar chart schedule. NOTE: you can print eh entire 7 day bar chart schedule in the reports tab.
- Manager Schedule: Allows you to view the Manager Fixed Schedule (we do not use).
- Reapply Fixed Schedule: Allows you to ere-set the manager hours back to the Manager Fixe Schedule.
- Schedule Summary: Show weekly total of allowed hours, scheduled hours, variance, and projections.
- Sort By: Allows you to re-arrange your schedule to show the earliest shifts first or to show the managers listed first.
- Auto-Save: Always make sure this is selected to save your schedule as you are working on it.



Step 2

Start a new schedule by clicking the “Auto Build” button – this will create shifts on your schedule.

- To move a shift, click in the middle of the line bar and drag the shift left or right.
- To extend or shorten a shift, click on one end of the line bar to adjust the shift.
- As you move or adjust shifts, notice how the +/- line will indicate how closely the schedule hours match the planned hours. While you may have shifts that +/- person, avoid shifts that are off by 2 or more people.
- To add a new shift, click the “Add Lines” button and use your mouse to draw a new line bar on the black line.
- To delete a shift, click the line you would like to remove then click the “Delete Line” button.
- To assign a shift to a crew member, right-click on the “Unassigned: name and select a team member from those available. Note: After right clicking the name, you may also select “show unavailable” to view all of the team members set up in RTI>

After creating all the shifts necessary for the day, click “Save” and move on to the next day.

Visual Scheduler - 6280 Barrett Parkway [11/21/2016 - 11/27/2016]

Projected Sales	2372			7	65	171	212	139	115	209	271	278
Job Name	Standa...	Adjust...	+/-	5am	6am	7am	8am	9am	10am	11am	12pm	1pm
*AM Prep - <2	1	1						1	1	1	1	
*Closing - <1.6	2	2										
*Mgr Admin	2	2										
*Opening	3	3		1	1	1	1	1	1	1	1	1
*PM Prep - <2	1	1										
*Porter - <1.6	2	2			1	1	1	1	1	1	1	1
*Training - <1.6	1	1										
Play Area Maint ...	0.5	0.5										
Service Labor ...	60	60		2	2	2	2	2	2	2	2	2
Planned Hours	72.50	72.50		1	1	3	3	4	4	4	4	4
Scheduled Hours	73.50	73.50		2	2	3	3	4	4	4	4	4
+/-		1.00		1	1			-1	-1	-1	1	1

Day: 11/21/2016 (M T W T F S S)

Drag to Schedule to Label Position

Schedule Highlight: Breaks Available Retention Day Parts Last Shift Start Allowed Large Font

Daily Labor %: 18.42%
Weekly Labor %: 2.56%

Special Event: Closer 1, Closer 2, Dining Room

Buttons: Prev Day, Next Day, Add Lines, Delete Line, Auto Build, Load Prior, Restore Day, Force Break, Add Breaks, Labor Params, Emp. Sched., Emp. Avail., Notes, Print, Mgt. Sched., Reapply Fix. Sch., Sched. Summary

Employee	In	Out	Ho...	5:00a	6:00a	7:00a	8:00a	9:00a	10:00a	11:00a	12:00p	1:00p
SHONKEKIA ...	5:00 AM	3:00 PM	10									
DULAURICE ...	8:00 AM	6:00 PM	10									
KERLINE GE...	3:00 PM	12:00 AM	9									
Unassigned	4:30 AM	7:30 AM	3									
Unassigned	5:30 AM	8:30 AM	3									
Unassigned	6:00 AM	9:00 AM	3									
Unassigned	7:00 AM	10:00 AM	3									
Unassigned	7:00 AM	2:30 PM	7.5									
Unassigned	11:00 AM	3:00 PM	4									
Unassigned	12:00 PM	8:00 PM	8									
Unassigned	1:00 PM	7:00 PM	6									
Unassigned	5:00 PM	12:00 AM	7									

Best Practices

- Schedule shifts in 15 minute increments. For example, rather than scheduling a team member from 11:00 – 2:00, a shift of 11:15 to 2:00 may better match the needs based on projected sales.
- Stagger shifts in and out so the Point Guard has time to coach team members in and out. For example, rather than have 3 team members all start their lunch shift at 11:00, stagger the start times at 10:45, 11:00, and 11:15.
- If you schedule breaks, ensure breaks are taken. Unused breaks can add several worked hours to the day and cause you to miss labor.
- Place breaks properly by avoiding breaks during peak service times or at the very beginning or end of shifts.
- Do not start or end shifts in the middle of peak service times. For example, do not start a lunch shift at noon.
- Always meet minimum staffing levels determined by Service Hours to ensure you have enough team member to take care of the anticipated sales.
- Open Shifts occur when you have less labor than called for by the Service Hours. For example, if sales call for 6 service Hours and you have scheduled 5 team members, you will have 1 open shift. If you have schedule 4 te3am members, you will have 2 open shifts, resulting in 2 less team members than ended to serve the customers based on your sales projections.
- Avoid scheduling team members more than 37 hours to prevent overtime hours.
- Manager Schedules must be written to meet the needs of the business by staggering hours to cover peak breakfast, lunch, dinner and weekend hours while working all shifts during the period.