

Aloha Table Service Managing Employees and Users

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What's new with employees and users

Effective with Aloha® Configuration Center/Aloha Manager v18.6, you configure and manage employees requiring Front-of-House (FOH) access and above-store access (BOH) in Table Service or Quick Service using two functions: Employees and Users. Upon upgrade, no action is required; however, any employee designated as 'Above store only' or 'POS and above store only' in the Employees function automatically migrates to the new Users function. You continue to use 'Employees' to configure and manage employees who log in to the FOH, but you use 'Users' for employees requiring above store access or POS and above store access.

After the upgrade, CFC users choose the level of ownership to assign a user (i.e. Corporate or a specific site) using the New drop-down arrow in Users. Typically, there is only one Global user per company. Be sure to name any Corporate user so that it is easy to identify the level of owner you manage employees using an external application and pass them to the Aloha POS system using HR Bridge, please note that how you manage BOH users is impacted by this change. Please reference the HR Bridge User Guide.



Tip

You must set up a store in the Store function before you can create a user with site-level ownership for that store.

Setting up a user

1. Select **TS** or **QS** in the product bar.
2. Select **Maintenance > Labor > Users**.

3. Click **New (AM)** or click the **New drop-down arrow (CFC)** and choose the **level of ownership** to assign the user, i.e. Corporate or a specific site.
4. Enter a **user name** that easily identifies the level of ownership assigned to the user.
5. Enter a **first name** and **last name** (required). If the user ownership is at Corporate or site, two additional options are present, 'Nickname' and 'POS employee number.'
6. Optionally enter a **nickname**, which fills the same purpose here as it does within the existing Employee record; however, the entry here overwrites what exists there, if different.
7. If the user also accesses the FOH, type the **employee number** assigned to the employee in the Employees function in 'POS employee number.'
8. Under the 'Authorization' group bar, select a **site** within this CFC instance to which you allow this user to access and act upon data from the **Available** list box and click "> >" to move the site to the **Included** list box as an 'Allowed owner.'



Tip

If using CFC, any user defined with more than one 'Allowed owner' must select the owner they wish to work with at each login. AM users can only assign their one site to a user.

9. Select the **security role** to assign for the selected site from the 'Security role' drop-down list. The security role determines the functions and actions the user can do within the selected site.



Tip

For this function to work correctly, ensure the security role assigned to the person managing employees has access to the new Users function.

10. Repeat **steps 8** and **9** for each site to which the user has access.
11. Click **Save** and exit the **Users** function.



HR Bridge Users: If you manage employees using an external application and pass them to the Aloha POS system using HR Bridge, please note that how you manage BOH users is impacted by this change. Please reference the HR Bridge User Guide.