NEW MANAGER SYSTEM ACCESS CHECKLIST

Overview

This document is intended to provide general guidance for hiring managers and district managers when granting Compass Group system access to newly hired salaried managers (Note: This guide is not intended for hourly associate set up). All systems referenced in this document can be accessed through the Owner's Management Suite (OMS):

- MyCPM
- MyAccess
- MyITStore
- Wireless Helpdesk
- P-Card/MyConcur
- MyFinance
- MyReports
- MyOrders
- Webtrition
- MyLMS
- MySTAFF
- MyI-9
- PeopleHub
- MyAdmin
- Cisco Webex
- First Advantage

Systems Required for All New Salaried Managers (Steps A - E)

Before completing steps A-E, collect the new manager hire's applicant forms (employment application, direct deposit information, copy of voided check) with the following information:

- Full associate name
- Complete address
- Cost center
- Date of birth and Social Security or personnel number
- All personnel data required to hire employee for Step A

Step A — MyCPM

Assign employee ID number; maintain employee hire/rehire status, address changes, position, pay rate, tax information and payroll reports, including stubs, payroll registers and specific unit hierarchy

Who's Responsible: Hiring Manager/DM

1. From Owner's Management Suite (OMS), go to MyCPM under the People Management tab.
2. *Associates need to be in MyCPM prior to assigning access:*
   a. *If hired through PeopleHub:* Employee information will populate in MyCPM after the Onboard module is completed and the Chief has approved the hire in MyCPM.
   b. *If not hired through PeopleHub:* You must add the associate to your team by clicking on the **MyTeam** tab within MyCPM. Click the **Hire/Rehire** link under the **New Associate** section and enter the associates data in the required fields.
3. To assign a new manager with "Chief" or "Delegate" access, the hiring manager will need to click on the **Administration** tab. Click **Request New MyCPM User-ID** and assign the Chief or Delegate access within that manager's organization.
4. Refer to MyCPM Reference Guide for maintenance of Chief and Supervisor Information.

For more information about MyCPM, refer to the Knowledge Base Articles in MyRequests under the Payroll Customer Console. MyRequests can be found in the Owner's Management Suite > *Applications> Administration and Support Tab.*

Step B — MyAccess

Create user network ID accounts and Compass email addresses; grant access to MyMail, MyCompass and Skype

Who's Responsible: Hiring Manager/DM

1. During onboarding within PeopleHub, set up the network ID and Compass Email address etc. in advance. Otherwise follow steps 2-6 to create these in MyAccess.
2. From the Owner's Management Suite (OMS), click on *Applications > Administration & Support Tab*
3. Go to MyAccess and click the Manage tab.
4. Click Create User.
   Note: A personnel number is not required and these steps can be completed in advance of the employee's first day.
5. Complete New User information and click Submit.
6. To assign a new user with "Manage" tab access, grant the new hire with "Chief" or "Delegate" status in MyCPM (refer to Step A for instructions). The function is usually added within 24 hours.

For more information about MyAccess, refer to the MyAccess Quick Reference Guide.

Step C — MyITstore

Order a new computer for the new hire or transfer a user license for an existing computer

Who's Responsible: Hiring Manager/DM

1. Before beginning this step, the hiring manager/DM should determine if a new computer is needed or the transfer of an existing laptop's license is required.
2. From the Owner's Management Suite (OMS), go to *Applications > Administration & Support* and select MyITStore.
3. Log in with your Compass Group network ID and password *Note: If you are a first-time MyITStore user, you may be required to update your profile on the MyITStore website.*
4. Once logged in, click Store and order the appropriate hardware.

Note: For new hires, it is a best practice to complete these steps prior to their start date. You do not need a personnel number as only the new hires cost center and first & last name are needed to order the new computer

For more information, contact the following:

- MyITStore inquiries - MyITStore@compass-usa.com
- Hardware Transition Team/Refresh inquiries - HTT@compass-usa.com
- Lease charges & equipment transfer inquiries - ITLeaseAdmin@compass-usa.com

Step D — Wireless Helpdesk

Order the new manager hire a cellular/wireless device

Who's Responsible: New Hire or Hiring Manager/DM

An associate's immediate supervisor determines if issuance of a cell phone is warranted. See Section I of Compass Group's Mobile Computer & Wireless DevicePolicy for more information. An active personnel number and manager approval is required to order a device.

From the Owner's Management Suite (OMS) select *Applications > Administration & Support* and select Wireless Helpdesk or call **888-250-2171**.

If ordering by phone, provide the helpdesk technician with the associate's name, personnel number, email address,cost center, approving manager's name and shipping address. If ordering by website, log in to the Wireless Helpdesk and go to **Order**.

Under **Order** select **New Service with Equipment,** and search for the associate. Select the associate and click **Next**. Follow the steps to choose the device, rate plan,accessories and shipping address. Review the order details then click **Submit.**

The helpdesk will generate a ticket for the approving manager and sector moderator before any equipment will be ordered.

Note: Orders generally take between 3-5 days to be fulfilled and can be initiated 2 days after the employees personnel number is assigned.

To view a listing of all your direct reports, click **Inventory** to access the **Manager's User Dashboard.** For more information, call **888-250-2171.**

Step E — MyConcur

Request P-Cards and Access for Expense Managment

Who's Responsible: Hiring Manager/DM

1. Hiring managers/district managers request P-Cards for new manager hires via MyAdmin. Select **Create Request, Treasury** then **PCard Request** and complete the request form.
2. Access P-Card documents here.
3. Once a P-Card is obtained, the new manager hire will use the Concur website each month to review transactions and print required reports.
4. To access the MyAdmin site, go to the Owner's Management Suite (OMS) and click *Applications > Administration & Support Tab.*
5. To access the Concur site, go to the Owner's Management Suite (OMS) and click *Applications > Administration & Support Tab.*

To gain access to Concur (For Non P-Cardholders) in order to submit reimbursement for out of pocket expenses and mileage, email expensesupport@compass-usa.com

For more information about P-Cards, contact the appropriate contact for your sector. If you are unsure about who to contact after referring to the contact list, email P-CardInquiry@compass-usa.com.

Step F — MyFinance

Grant access to accounting functions such as daily sales entry, paying vendor invoices, transferring expenses, conducting weekly and period-end close. (Note: Excludes Morrison Healthcare and Morrison Senior Living units)

Who's Responsible: Hiring Manager/DM

1. A District Manager, Accountant or Chief for the new hire manager's cost center grants the new user MyFinance access.
2. Click here for detailed instructions on adding users to MyFinance.

For more information about MyFinance, email MyFinance Support or call **888-295-7206, Option 1**.

Step G — MyReports

Provide access to financial and benefits reporting, including P&Ls, operating ledgers, balance sheets, subsidy invoices, group insurance billing and hours measurement reporting

Who's Responsible: New Hire

1. New manager hires should contact their respective Field Accounting representatives. If a new hire does not know who that representative is, he/she should ask his/her District Manager.
2. Once access is confirmed via email, the new hire can access the MyReports module from the Owner's Management Suite (OMS) by clicking *Applications > Business Management & Reporting Tools* tab.

For more information about MyReports, contact Field Accounting.

Step H — MyOrders

Place all day-to-day food orders from broadline and most company-approved vendors; module to input inventory

Who's Responsible: New Hire

New manager hires should visit the MyOrders TrainingSite and click the "Take Survey" link on the right side of the screen. Once the user completes the survey, there is a 24- to 48-hour waiting period before access is granted. Once access is confirmed, the new hire can accessMyOrders from the Owner's Management Suite (OMS) byclicking Applications > *Business Management & Reporting Tools* tab.

For more information about MyOrders, refer to these Quick Reference Guides or call BuySmart at **877-499-3663**.

Step I — Cisco webex

The preferred solution for Voice, Video and Web Conferencing

Who's Responsible: New Hire

1. Ensure that a user Network ID has been created using MyAccess
2. Navigate to Compass-USA.Webex.com
3. Click the **Sign In** on the left of the screen
4. Enter your Compass Email & Password if prompted
5. Click **Preferences** on the left of the screen and:
   a. Under the **General** option set Time Zone, Language and Region
   b. Click **Save** at the bottom of the page
   c. Under the **My Personal Room** option set the Host PIN
   d. Click **Save** at the bottom of the page
6. Click **Home** on the left of the screen
7. Under **My Personal Room** panel, click **More Ways To Join**
8. Record your meeting **Access Code** for use as your new personal voice conference Meeting ID

For more information visit WebEx TechSmart or call **888-295-7206** Option **2** or ITOnline@compass-usa.com.

The Technology Service Center is open M-F from 7am - 8pm EST and Saturdays from 8am to 12pm EST

Step J — MyLMS

Complete required training(s), register for online instructor-led and live trainings

Who's Responsible: Automatic system access

Access is automatically granted on the new hire's start date.

To access MyLMS, go to the Owner's Management Suite(OMS) and click *Applications > Application Training > MyLMS.*

Log on to the site with your 8 digit personnel number as your user name and *Welcome1* as your password.

For more information about MyLMS, email MyLMS@compass-usa.com or call **877-311-4747**.

Step K — MyStaff

Track regular hours, overtime and vacation/holiday/sick time

Who's Responsible: Automatic system access for Chiefs

1. MyCPM Chiefs are automatically granted access when their cost centers are active on MySTAFF.
   - MyCPM Chiefs have the ability to give login permissions to non-Chief associates with Compass Group network IDs. Click here for MySTAFF set-up instructions.
   - Associates who require MySTAFF access but do not have network IDs should follow Step B – MyAccess to get started.
2. To access MySTAFF, go to the Owner's Management Suite (OMS) and click *Applications > People Management* tab.

For more information, refer to the MySTAFF User Guide or the MySTAFF Knowledge Base Articles in MyRequests.

Step L — MyI-9

Perform electronic I-9 and E-Verify checks for new hires and rehires

Who's Responsible: Automatic system access for Managers

1. MyI-9 access is automatically granted to new hire managers. New managers who have difficulty accessing the system should contact the MyI-9 support team (see contact information below) to let them know which locations they need access to.
2. MyI-9 training is available on MyLMS-MyI-9 General Training and MyI-9 E-Verify Training.
3. To access MyI-9, go to the Owner's Management Suite (OMS) and click *Applications* > *People Management* tab.

For more information about MyI-9, email MyI-9Support@compass-usa.com or call **877-311-4747, Option 2, Option 5, Option 4**.

Step M — PeopleHub

Recruit and onboard hourly/frontline, entry-level managment (ELM) and professional/management (PM) associates (Formerly MyOpportunity)

Who's Responsible: Automatic system access

1. PeopleHub access is automatically granted to new hire managers the day after they are entered into MyCPM.
2. To access PeopleHub, go to the Owner's Management Suite (OMS) and click *Applications* > *People Management* tab.
3. Complete the required MyOpportunity Training for Managers available on MyLMS. Separate trainings are available for Frontline/ELM and PM Associate hires.

For more information about PeopleHub Frontline, email CNRC@compass-usa.com or call **877-311-4747, Option 2 (1 for Crothall), Option 5, Option 1.**
For more information about PeopleHub Frontline/ELM, email CGTAHelp@compass-usa.com or call **877-311-4747, Option 2 (1 for Crothall), Option 5, Option 2**

Step N — MyAdmin

Create new cost center numbers and request setup for the following services for new cost centers:

- *MyFinance*
- *Imprest Fund*
- *Vehicle Requisition*
- *Vehicle Program Enrollment*
- *Vendors*
- *Coke/Pepsi & CO2*
- *Hot Beverage*
- *CStore*
- *Liquor License*
- *Payroll Access*
- *Employee Onboarding*
- *MySTAFF Tablet Clock*
- *PCards*
- *MyAccess Network ID Request*
- *Resale Certificates*
- *Bank Accounts*
- *Armored Cars*
- *Merchant ID Requests*

Request new services for existing cost centers (see services listed above)

Submit capital asset Quotes, Purchases, Violations requests and Contractual Commitment requests

Submit External Brands Site Survey forms

Submit Technology requests for Cell Phone Stipends, Food & Beverage Retail Technology, Nutrislice and Canteen Device Order Requests

For more information email MyAdminSupport@compass-usa.com.

Who's Responsible: Managers or their supervisors

To obtain access:

1. Anyone with "Chief" or "Delegate" designation in CPM automatically has access to his/her respective cost centers.
2. For anyone without Chief or Delegate designation or to add access to additional units:
   - Click on the Support button that appears when attempting to access MyAdmin – this generates a support email. Please identify to which cost center number(s) you need access.
   - You can also email MyAdminSupport@compass-usa.com. Include your User ID and specify which cost center number(s) you need access.

To access the MyAdmin site, go to the Owner's Management Suite (OMS) and click *Applications* > *Administration & Support Tab.*

Other Tips:

- **Sector-specific processes may prevent the use of certain forms within MyAdmin. Only those forms your sector uses will be available to you.**
- **Chief** is a designation granted to a specific individual in MyCPM. A Chief can enter and update information for associates that directly report to them. For example, a Unit Manager.
- **Delegate** is a designation granted to one or more individuals in MyCPM allowing them to perform most functions on behalf of the Chief for the entity (i.e., enter or update information when a Chief is not available).
- There is a Chief for the region (ex: RVP), Chief for the district (ex: DM) and Chief for the unit (ex: Unit Manager).

Step 0 webtrition

Plan menus, find recipes, research nutritional information and build reports on menu costs

Who's Responsible: New Hire

Access instructions vary by sector, per below:

Bon Appétit email Terri.Brownlee@bamco.com

FLIK Independent Schools:

email Nicole.Feneli@compass-usa.com

FLIK B&I: Complete User Request Form here and return form to your Regional Dietitian or contact Nicole Feneli at Nicole.Feneli@compass-usa.com

RA: email VMartinet@restaurantassociates.com

Wolfgang Puck email Tina.Lovell@wolfgangpuck.com

Canada: email Webtrition@compass-canada.com

Canada Foodbuy: email: webtritionsupport@foodbuy.ca

Canteen: Contact your Regional Chef

Chartwells Higher Ed: Complete User Request Form

or email Megan.Simon@compass-usa.com

Chartwells K-12: See MyCompass Webtrition Page

Culinart email SDorfman@culinartinc.com

Morrison Healthcare, Morrison Community Living, Flik Future Living and TouchPoint email SharedWebtritionUserManagement@iammorrison.com

Lifestyles of Unidine ACTS Communities:

email Joseph.Baj@compass-usa.com

Eurest Existing users complete form. New users must complete all four modules on MyLMS for WebT2MW. Wait 3-5 business days, and if still no access, email EurestWebtritionSupport@compass-usa.com

Google: email webtrition@google.com

ESS: email Robyn.Lorado@compass-usa.com

Levy: email pacoleman@levyrestaurants.com

Thompson Hospitality: For Joint Ventures

email: Kamal.Rose@Thompsonhospitality.com
For Schools email: D.Zaikouk@thompsonhospitality.com

For technical assistance, call the Compass Technology Support Line at **888-295-7206 Option 1, Option 7**

Step P FIRST Advantage

Gain access to the background screen vendor for associates who are involved in the hiring process

Who's Responsible: New Hire/Hiring Manager/District Manager

Accounts must first be setup in the system before requesting additional User Access.

1. Setup an Account:
   a. Email FADVEnrollments@compass-usa.com for **Account Setup Form** and **User Enrollment Form.** Submit back to Mailbox. Processing takes 7-14 Days.
   b. New Account setup requests should be submitted with at least one **User Enrollment Form** included. Failure to include a user could result in delays in account access.
2. User Access:
   a. Submit **User Enrollment Form** to FADVEnrollments@compass-usa.com. Form can be retrieved by emailing the above Mailbox. Requests take up to 48 hours to process.
   b. A welcome email with a User ID, Client ID and temporary password will be sent to the new user.

To access First Advantage, go to the Owner's Management Suite (OMS) and click *Applications* > *People Management*

For additional assistance, contact FADVEnrollments@compass-usa.com or backgroundchecksupport@compass-usa.com