



Team Access User Guide

Revision 1.4

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Notices

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Updates, additions, and other revisions to the *Team Access User Guide* will be made, as necessary, to reflect changes in features and functionality. Changes will be posted on the Subway Partners® website; they also will be communicated, as appropriate, through STS.

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Application Version

Revision 1.4 of the *Team Access User Guide* applies to version 1.2.0.0 of Team Access.

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Basics

Franchise owners and other restaurant staff use Team Access to create and maintain user accounts for their employees on Subway Partners®.

Click any of the following links for more information:

- [Open Team Access](#)
- [Header Bar](#)
- [User Roles](#)
- [Naming Conventions for User Names](#)
- [Email Addresses in User Accounts](#)
- [Employee Access to Other Applications](#)
- [Feedback](#)

Open Team Access

1. Log into [Subway Partners®](#).
2. On the Technology tab, click **Team Access**.

If you are a franchisee owner or a store employee editor, an important message about Subway Listens™ may appear.

Important: Access to Subway® Listens Platform

The new Subway® Listens Platform was recently launched.

All Franchisees and employees with a Store Manager or Franchise Office Staff role have access to the Subway® Listens Platform. This permission grants them the ability to view and respond to customer surveys for their shops.

You can manage individual permissions for the Subway® Listens Platform on the employee's Application Permissions tab. To revoke the permission for any employee, unselect the Subway® Listens Permission on the Application Permissions tab.

Check here to indicate that you have read and understood this permission update.

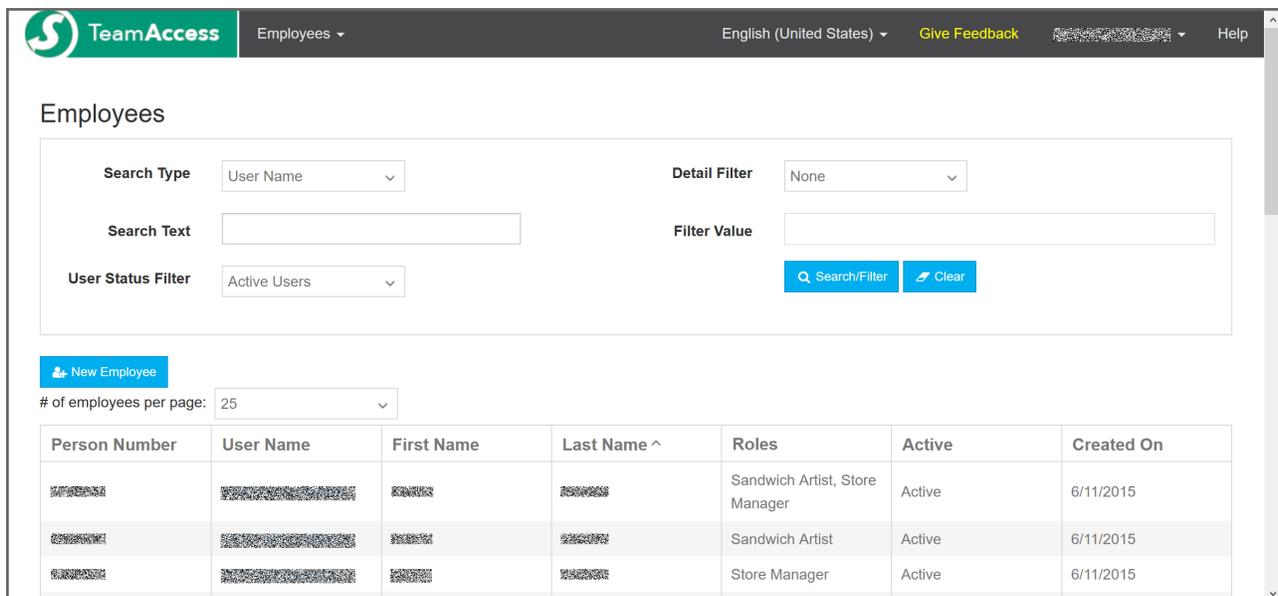
[Continue](#)

3. If the important message appears, confirm that you have read and understand the message.
 - a. Read the entire message.
 - b. Select **Check here to indicate that you have read and understand this permission update.**
 - c. Click **Continue.**

Important

- If you do **not** confirm that you have read and understand the message, you cannot use Team Access. Either confirm the message or sign out.
- Once you **confirm** the message, you can begin using Team Access. The message does not appear the next time you open Team Access.

Team Access opens.



The Team Access home page includes:

- Header bar – On the header bar, you can do the following:
 - [Navigate](#) Team Access (see [Header Bar](#))
 - Change [the language](#) of the interface (see [Header Bar](#))
 - Provide [feedback](#) (see [Feedback](#))
 - [Sign out](#) (see [Header Bar](#))
 - Access this user guide (see [Header Bar](#))
- Tools to [search](#) and [filter](#) the list of your employees (see [Access Accounts](#) and [Filter Search Results](#))

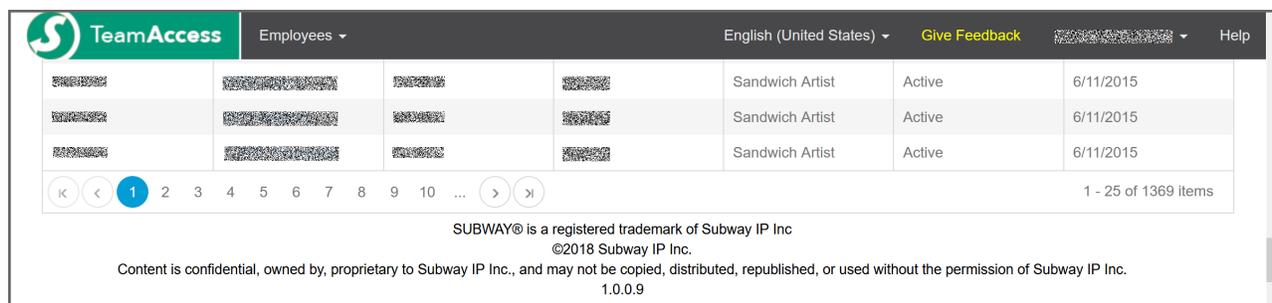
- List of your employees

Click any of the following links for more information:

- [Access Accounts](#)
- [Create Accounts](#)
- [Edit Accounts](#)
- [Deactivate an Account](#)
- [Other Tasks](#)

Header Bar

In Team Access, the header bar is fixed at the top of the page as you scroll.



On the header bar, you can do the following:

- Display the list of your employees – Click **Employees > Employee List** or click the Team Access logo.
- Create a new user account – Click **Employees > New Employee**.
- Change the language of the user interface – Click the current language, and then click the language you want.
- Provide feedback on your experiences using Team Access – Click **Give Feedback**.
- Sign out of Team Access – Click your name, and then click **Sign Out**.
- View this user guide – Click **Help**.

User Roles

A user role specifies which resources on Subway Partners® that a user can access. Each user account must be assigned one of the following user roles:

- Franchise Office Staff – A franchisee-organization employee who does not perform the duties of any of the other roles listed here. These users can access information within Subway Partners® that they need to perform their work.

- Store Manager – An employee who manages a shift, restaurant, or multiple restaurants. These users can access information within Subway Partners® that they need to perform work as a manager.
- Assistant Manager – An employee who assists with the management of a shift, restaurant, or multiple restaurants. These users can access information within Subway Partners® that they need to perform work as a manager.
- Shift Supervisor – An employee who manages shifts at one or more restaurants.
- Senior Sandwich Artist™ and Sandwich Artist™ – An employee of a restaurant with minimal Subway Partners® privileges. These users can access content that is targeted specifically to a Sandwich Artist™.
- Store Employee – A franchisee-organization employee who does not perform the duties of any of the roles listed previously. These users can access information within Subway Partners® that they need to perform their work.

Naming Conventions for User Names

User names are typically combinations of numbers, letters, underscores (_), hyphens (-), and colons (:). Use a naming convention to assign consistent user names so you can sort and search for user accounts more easily.

The recommended user name format is the restaurant number followed by the first and last name of the user (for example, 1234-joesmith).

When you use this convention, however, you need to update the user name to match the restaurant location when an employee changes restaurants. For example, if Joe Smith moves from store 1234 to store 5678, you would need to change his user name from 1234-joesmith to 5678-joesmith.

If you use a different naming convention, be consistent in the format, prefixes, use of special characters (such as hyphens), abbreviations, and other characteristics.

Email Addresses in User Accounts

Be sure to have a current email address for each user account.

Emails are sent for University of Subway® activities, including course notifications and certificates of completion. Current email addresses are also needed to respond when a user clicks **Forgot User Name?** and **Forgot Password?** on Subway Partners®.

Use the email address for the user, not for someone else (for example, the franchisee). If an employee does not have an email address and you must use another one (for example, the email of the store manager), check the address regularly to make sure that it is current.

Employee Access to Other Applications

You can give employees access to a number of applications, based on their roles and responsibilities within your organization.

Located on the Application Permissions tab on the New Employee and Edit Employee screens, these settings are optional and you can turn them on and off at any time.

- **Equipment Ordering**

This setting gives the employee access to Equipment Ordering System (EOS). An employee with this permission can order equipment on behalf of the franchisee.

Only the **franchisee** who owns **all** restaurants assigned to the employee can grant this permission; otherwise, the option for this permission is **disabled**. An FWH employee cannot grant this permission.

The permission is **revoked** automatically under the following conditions:

- The employee is assigned to another restaurant. If you own the restaurant, you can grant the permission again.
- The employee is deactivated. If the employee is reactivated, you can grant the permission again.

- **FSC Online Store**

This setting gives the employee access to the FSC Online Store to make purchases of in-store equipment on your behalf.

- **LiveIQ**

This setting gives the employee access to these LiveIQ options:

- **LiveIQ Reporting** – Gives the employee permission to view near-real-time restaurant data from restaurants with which the employee is associated in Team Access.
- **LiveIQ Store Setup** – Gives the employee permission to use LiveIQ to set up restaurants associated with the employee.

You can give the employee access to one option or both.

- **Menu Manager**

This setting gives the employee access to Menu Manager. Employees with this permission can complete the weekly inventory, set up a menu, and publish a menu that someone else has set up.

To grant this permission, you must be the primary owner of the affected restaurants. The user accounts where you grant this permission must be assigned exclusively to the affected restaurants.

- **Subway® Global Toolkit**

This setting gives the employee access to the Subway® Global Toolkit (on the Marketing tab on Subway Partners®). Employees with this permission can download and watch marketing tutorial videos, download or order local marketing support materials, and build customizable marketing plans. Two versions of the toolkit are available: one for the United States and one for Canada.

- **Subway Listens™**

This setting gives the employee access to Subway Listens™. Employees with this permission can view and respond to customer surveys from all restaurants to which the employee is assigned.

You can grant this permission to franchise office staff and store managers only.

- **SubwayIQ**

This setting gives the employee access to view the SubwayIQ Store Employee Reports folder and the Customer Experience Summary report contained in the folder. You can give the employee either standard access or advanced access but not both. Users with advanced access can view restaurant sales reports, while users with standard access **cannot** view them.

When users view the report, they see only the restaurants that you assigned to them through Team Access. Only users who are set up as store managers or office staff can access the report link from Subway Partners®.

Permissions may take as much as 24 hours to go into effect and are updated nightly.

- **Team Access > Store Employee Editor**

This permission gives the employee all the abilities that are available to you (the franchisee) in Team Access. The employee can set up user accounts, change restaurant assignments, deactivate accounts, and perform other tasks.

You may want to assign this permission to trusted staff members, so they can create and manage other user accounts on your behalf for the restaurants where the store employee editor is assigned.

A store employee editor can create and update only users with an equal or lower role than the editor's highest level role.

Access Accounts

The Team Access home screen displays the list of user accounts set up for your restaurants or the restaurants in your territory. If you have many user accounts, the list spans multiple pages. Use the page controls to browse your list.



By default, 25 accounts appear on each page. To increase the number of accounts displayed, enter a different number in **# of employees per page** (just above the employee list).

You can use the search fields to find specific user accounts quickly.

1. In **Search Type**, select how you want to search.
2. Enter your search term in **Search Text**.
If you search by name, enter all or the first few characters from the beginning of the name. The match occurs from the beginning of the name.
3. Click **Search/Filter**.
4. To order the user accounts in ascending order with respect to the values in any column (except Roles), click the column header. To order the accounts in descending order, click the column header again.
5. To return to the default setting and the full list, click **Clear**.

In addition, you [can filter the list](#) either before or after a search.

Filter Search Results

1. In **User Status Filter**, select the filter.
2. In **Detail Filter**, select the filter.
To filter based only on the user status that you selected in step 1, set **Detail Filter** to **None**.
3. In **Filter Value**, for **each** value on which you want to base the filter, select the value. You can select more than one.
4. To remove a selected value from the filter, click its **X**.
5. Click **Search/Filter**.
6. To order the user accounts in ascending order with respect to the values in any column (except Roles), click the column header. To order the accounts in descending order, click the column header again.
7. To return to the default settings and the full list, click **Clear**.

Create Accounts

Before you [create user accounts](#) in Team Access, especially if you are a multi-unit owner (MUO), keep the following guidelines in mind:

- As a franchise owner, you do not need to create an account for yourself in Team Access in any of your restaurants. Your Subway Partners® account gives you access to all franchisee resources and applications available through the website.
- A store manager does not need a separate account set up for each restaurant where the manager works. A manager needs only one account that includes the appropriate list of restaurants on the Shop Assignments tab.
- Reassign the home restaurant (and change the user name, if you want) for an employee who moves to another restaurant owned by the same franchisee or within the same BDA territory. Do not create a new account through Team Access.

Create a User Account

Create a user account for each employee on your staff. If you own multiple restaurants, you do not need to create a separate user account for each restaurant where an employee works.

Franchise owners and store employee editors can create user accounts.

1. Click **Employees** > **New Employee** (on the header bar) or click **New Employee** (above the employee list).
2. On the Person Summary tab, enter the personal information for the user.
 - **First Name**
 - (Optional) **Middle Name**
 - **Last Name**

The names in **First Name**, **Middle Name**, and **Last Name** must satisfy the following format:

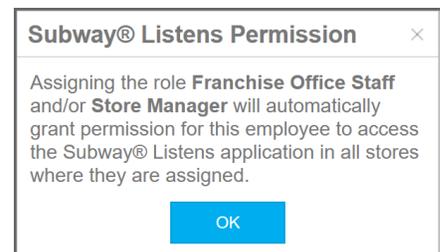
- Allowed characters: a–z, A–Z, - (hyphen), _ (underscore), ' (apostrophe), : (colon)
- No more than 255 characters
- No more than 1 space

- **User Name** (see [Naming Conventions for User Names](#))
- **Email**

Important

Do not register a user without an [email address](#). See [Email Addresses in User Accounts](#).

- (Optional) **Phone**
3. Set up the role assignments.
 - a. In **Roles**, select the [role](#) that you want to assign to the user.
See [User Roles](#).
 - b. If you select **Franchise Office Staff** or **Store Manager**, a message notifies you that this employee is given access to Subway Listens™ automatically. If necessary, you can remove the access later. Click **OK**.
 - c. To assign additional roles to the user account, repeat step a.
 - d. To remove a selection, click the **X** next to its name.
 4. Verify that the **Active** check box is selected.



5. Enter a password that complies with the rules displayed on the screen. Passwords are case-sensitive.
6. Click **Save**.
7. On the Shop Assignments tab, set up the restaurant assignments.
 - a. For each restaurant where this user works, select the role assigned to the employee at the restaurant. Select all that apply.
 - b. To associate the user to any restaurant that you purchase in the future, select **Associate all future stores I purchase with this user**.
 - c. In the Home Shop column, select the restaurant that is assigned as the University of Subway® home restaurant for the employee. You can select only one.

This restaurant is used as the home restaurant for training and transcripts for the user.
 - d. Click **Save**.
8. On the Application Permissions tab, set up the application permissions.
 - a. (Optional) Select one or more applications that you want the user to access.

If you select **Equipment Ordering**, a confirmation message opens. Read the message completely and carefully. Click **I accept** to turn on access; otherwise, click **I decline**.
 - b. Click **Save**.

Edit Accounts

You may need to edit a user account for any of the following reasons:

- [Change passwords and user names](#).
See [Edit a User Name and Password](#) .
- [Update personal information and email addresses](#) registered to an account.
See [Edit Personal and Contact Information](#) .
- [Change the roles](#) assigned to an employee.
See [Change the Roles Assigned to a User](#).
- [Add, remove, or change the restaurants](#) associated with an employee.
See [Change the Restaurants Assigned to a User](#).
- [Change the home restaurant](#) assigned to an employee.
See [Change the Home Restaurant Assigned to a User](#).
- [Turn on or turn off access to applications](#) on Subway Partners® (such as LiveIQ).
See [Change the Applications that a User Can Access](#).
- [Turn off accounts](#) for former employees.
See [Deactivate an Account](#).

When a franchisee buys a new location, the franchisee inherits the staff at that location with all the roles and permissions that were assigned in Team Access. If you are a new owner, be sure to verify those settings and make any necessary changes.

Franchise owners and store employee editors can edit user accounts.

Edit a User Name and Password

Franchise owners and store employee editors can change [user names](#) and [passwords](#) for employees as needed.

Changes to user names and passwords take effect immediately.

You may need to change passwords when employees forget their passwords and cannot retrieve them through the **Forgot Password?** link on the Subway Partners® login page. For example, an employee may not receive the reminder messages sent by the website because the employee no longer has the email address registered in Team Access.

Each password should be easy for its owner to remember but not easy for others to figure out. For example, the name of a spouse, child, or family pet is not a good password. If a user needs to write down the password to remember it, the reminder should be stored in a discreet location.

See [Edit a User Name](#) and [Edit a Password](#).

Edit a User Name

1. Locate the user in the employee list on the Team Access home page.
Use the [search function](#) if necessary. See [Access Accounts](#).
2. To view the account details, click the link for the user.
3. (Optional) To review the changes made in the past, click **View Employee Profile History**. When finished, click **Go Back**.
4. On the Person Summary tab, edit the [user name](#) as needed.
5. Click **Save**.

Edit a Password

1. Locate the user in the employee list on the Team Access home page.
Use the [search function](#) if necessary. See [Access Accounts](#).
2. To view the account details, click the link for the user.
3. (Optional) To review the changes made in the past, click **View Employee Profile History**. When finished, click **Go Back**.
4. Enter a new password that complies with the rules displayed on the screen. Passwords are case-sensitive.
5. Click **Save**.

Edit Personal and Contact Information

1. Locate the user in the employee list on the Team Access home page.
Use the [search function](#) if necessary. See [Access Accounts](#).
2. To view the account details, click the link for the user.
3. (Optional) To review the changes made in the past, click **View Employee Profile History**. When finished, click **Go Back**.

4. Edit or update the personal information.

- **First Name**
- (Optional) **Middle Name**
- **Last Name**

The names in **First Name**, **Middle Name**, and **Last Name** must satisfy the following format:

- Allowed characters: a–z, A–Z, - (hyphen), _ (underscore), ' (apostrophe), : (colon)
- No more than 255 characters
- No more than 1 space

- **Email**

Important

Do not register a user without an [email address](#). See [Email Addresses in User Accounts](#).

- (Optional) **Phone**

5. Click **Save**.

Change the Roles Assigned to a User

You can change the [user roles](#) to keep pace with an employee's changing role in your organization for promotions (for example, Sandwich Artist™ to Senior Sandwich Artist™), expanding responsibilities (for example, Senior Sandwich Artist™ and Shift Supervisor), and so forth. See [User Roles](#).

1. Locate the user in the employee list on the Team Access home page.

Use the [search function](#) if necessary. See [Access Accounts](#).

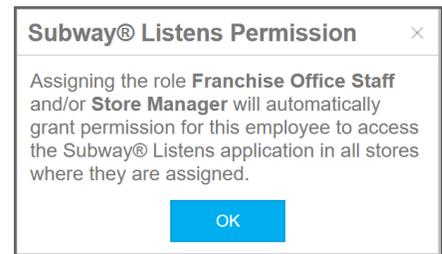
2. To view the account details, click the link for the user.
3. (Optional) To review the changes made in the past, click **View Employee Profile History**. When finished, click **Go Back**.

4. In **Roles**, make changes as necessary:

- Select the [role](#) that you want to assign to the user.

If you select **Franchise Office Staff** or **Store Manager**, a message notifies you that this employee is given access to Subway Listens™ automatically. If necessary, you can remove the access later. Click **OK**.

- Click the **X** in any role you want to remove.
- You can make as many changes as you need, but the user account must have at least one role assigned to it when you are finished.



5. Click **Save**.

Change the Restaurants Assigned to a User

You can change restaurant assignments as your employees begin working in more of your restaurants, stop working in others, or switch entirely from one restaurant to another within your organization.

Restaurant assignments affect the restaurants that employees with Store Employee Editor permissions can view when they add or edit user accounts. Restaurant assignments also affect the restaurants that users can access when they have permissions to applications such as LiveIQ or SubwayIQ.

Your changes register immediately in Team Access, but it may take up to 24 hours for the changes to take effect in some of the other applications that the user can access. Those permission changes are processed nightly.

1. Locate the user in the employee list on the Team Access home page.
Use the [search function](#) if necessary. See [Access Accounts](#).
2. To view the account details, click the link for the user.
3. (Optional) To review the changes made in the past, click **View Employee Profile History**. When finished, click **Go Back**.

4. On the Shop Assignments tab, for each restaurant-role you want to change:
 - Select the check box to add the restaurant-role to the employee's assigned list.
If the employee has access to Equipment Ordering System and is **not** assigned to the restaurant in another role, a message opens. The message notifies you that the access is revoked when you save the account. Click **OK**.
 - Clear the check box to remove the restaurant-role from the employee's assigned list.
If the employee has access to Equipment Ordering System, the access is **not** revoked; however, the employee can order equipment for **only** the restaurants assigned to the employee.
 - If the employee works in multiple roles in a restaurant, make the appropriate changes for each role in each restaurant.
5. (Optional) Select **Associate all future stores I purchase with this user**. If you select it, the user is associated automatically to any new restaurants you purchase.
6. Click **Save**.

Change the Home Restaurant Assigned to a User

The home restaurant is where an employee works primarily and where usage appears for an employee on the University of Subway®.

1. Locate the user in the employee list on the Team Access home page.
Use the [search function](#) if necessary. See [Access Accounts](#).
2. To view the account details, click the link for the user.
3. On the Shop Assignments tab, in the Home Shop column, select the restaurant that is the University of Subway® home restaurant for this employee. You can select only one.
4. Click **Save**.

Change the Applications that a User Can Access

You can turn on or turn off [access to various applications](#) as needed. See [Employee Access to Other Applications](#).

Permissions may take as long as 24 hours to go into effect in some applications, because those permission changes are processed nightly.

1. Locate the user in the employee list on the Team Access home page.
Use the [search function](#) if necessary. See [Access Accounts](#).
2. To view the account details, click the link for the user.

3. (Optional) To review the permissions the user was assigned in the past, on the Application Permissions tab, click **Permission Override History**. When finished, click **Go Back**.
4. On the Application Permissions tab, for each application that you want to turn on or turn off for an employee:
 - Select the application check box to turn on access.
If you select **Equipment Ordering**, a confirmation message opens. Read the message completely and carefully. Click **I accept** to turn on access; otherwise, click **I decline**.
 - Clear the application check box to turn off access.
5. Click **Save**.

Deactivate an Account

User accounts are deactivated rather than deleted from Team Access. As a general practice, deactivate the account of any employee who leaves your organization.

Once you deactivate a user account, that user can no longer log into Subway Partners® or any application.

1. Locate the user in the employee list on the Team Access home page.
Use the [search function](#) if necessary. See [Access Accounts](#).
2. To view the account details, click the link for the user.
3. Clear the check mark from the **Active** check box.
If the employee has access to Equipment Ordering System, a message opens. The message notifies you that the access is revoked. Click **OK**.
4. Click **Save**.

Other Tasks

You can use Team Access to transfer an employee's [University of Subway® transcripts](#) to your restaurant. See [Transfer a Transcript from the University of Subway®](#).

Transfer a Transcript from the University of Subway®

If you have an employee who worked previously at a restaurant that belongs to another owner, the employee can migrate his or her transcript from the University of Subway® to your restaurant.

To move the records with the employee from the old restaurant to yours, create a user account for the employee in your restaurant **before** you initiate a transcript move request through the University of Subway®.

For more information about when you do and do not need to submit transcript move requests, read [Types of Account Moves](#) on the [University of Subway®](#) Help tab.

1. [Create the user account](#).

Be sure to associate the employee with your restaurants. See [Create a User Account](#).

2. Complete the entire [Transcript Move Request Form](#) in the University of Subway®.

Be sure to include the original user name and the user name you just assigned to the employee.

3. Click **Submit**.

The old account and the new account are combined after you submit the move request form.

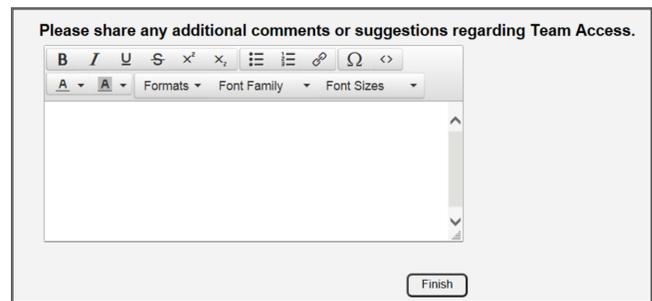
Feedback

You can give feedback to the developers about your experiences using Team Access.

1. On the header bar, click **Give Feedback**.
2. On the survey form, answer the questions by selecting your answer to each one.
3. (Optional) Enter any comments or suggestions that you have.

The field for entering your comments is a rich text editor. You can use the tools to format your comments and suggestions as you wish.

4. When finished, click **Finish**.
5. Close the browser tab.



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