

Account Admin - New Hotel Setup Checklist

Departments and Positions Settings Review

- Review departments and positions across properties to ensure consistency (15 minutes)
Article: [How to customize department structures and divisions](#)
- Deactivate any outdated Departments/Positions (10 minutes)
- Create any missing positions required for current operations (15+ minutes)
Article: [How to add or edit hotel positions](#)
- Review and confirm all active position codes (15+ minutes)
Article: [How to map 3rd party positions](#)

Time Settings & Scheduling Rules Review

- Review time & attendance settings for accuracy (e.g. work week, time zone etc.) (10 minutes)
- Review and update earning codes as needed (10 minutes)
Article: [Best Practices for Excluding Positions or Earnings Codes from Labor Management Reporting](#)
- Review and update the Review & Publish Rules for scheduling (e.g., long days, PT hour limits, staffing alerts) (5 minutes)
- Set deadlines for when schedules and forecasts are due (5 minutes)
Article: [How to configure schedule timelines and deadlines](#)

myHotelTeam (Employee Portal)

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- Define what schedule data employees can view within myHotelTeam (5 minutes)
- Review and adjust any additional Scheduler/myHotelTeam configurations (10 minutes)
- Set submission restrictions and designate blackout dates for special events/holidays (10 minutes)
- Send out myHotelTeam login credentials **Article:** [How to invite employees to MyHotelTeam](#) (10 minutes)

Employee Data Review

- Review the employee list to ensure all employees are assigned to the correct position(s) (15 minutes)
- Identify and update any discrepancies in the employee list (15 minutes)

Business Driver & Housekeeping Configuration

- Review the business drivers that have been added to the hotel and add any additional drivers as needed. (20 minutes)
Article: [How to Configure Business Drivers and Groups](#)
- (If applicable) Map additional revenue account code(s) that are being received from your PMS/revenue management system to the appropriate business driver (20 minutes)
Article: [How to Map 3rd Party Revenue \(RevSync\)](#)
- Review & adjust housekeeping clean types and update the labor standard with the new/updated clean type (10 minutes)
Article: [How to set up housekeeping clean types](#)

Labor Standard Review

- Ensure every active position has a labor standard entered (30 minutes)
Article: [Labor Plan FAQs](#)
- Review and adjust labor plans based on Daily Labor Check-in trends and benchmarking (30 minutes)
Article: [How to analyze Hotel Labor Benchmarker reports](#)

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Forecasting

- Review and update the forecast in Scheduler (5 minutes)
Article: [How to enter a forecast](#)

User Training & Communication

- Create logins and assign permissions (30 minutes)
Article: [How to add a new user and assign permissions](#)
- Send an email to hotel managers introducing them to Hotel Effectiveness
- Distribute system logins to Department Managers
- Issue invitations and specific training instructions to the Night Audit team (If applicable)

Training Milestones

- Ensure all managers complete "My Training" and register for live training webinars
→ **Due Date:** _____
- Confirm team attendance for monthly live training webinars:
 - Settings & Labor Plan **Due:** _____
 - Scheduler & myHotelTeam **Due:** _____
 - 5-Minute Daily Labor Check-In, Housekeeping Tools & Night Audit Entry
Due: _____
 - Hotel Effectiveness by Actabl - Username Menu & Reports **Due:** _____

Operational Go-Live

- Begin daily entry of Rooms/Revenue, Housekeeping Cleans, and Business Drivers.
→ **Start Date:** _____
- Managers begin scheduling in Hotel Effectiveness **Article:** [Scheduler User Guide](#)

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→ **Draft/Review/Publish by:** _____

- Daily Labor Check-in review begins immediately after scheduling has been completed. **Article:** [How to perform the 5-Minute Daily Labor Check-In](#)

→ **Start Date:** _____

For Additional Resources: [Knowledge Base Portal](#)