

**Training Guide**  
Managing Your Staff in  
Employee Manager

# Managing Your Staff in Employee Manager

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# Creating Default Shifts or Positions

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## Unit 1: Creating Default Shifts or Positions

Employee Manager is where you go to establish all the positions or shifts your employees might be scheduled to work. After adding the position ("Waitstaff," "Bartender," etc.), you can then designate other relative details: an optional price to charge the customer; an estimated cost to you; default event times; and even event rules to determine how many employees each position will require.

### Objectives:

Upon completing this unit, you will be able to:

- Add a position to Employee Manager.
- Assign a "price" to the position.
- Assign additional default position requirements.
- Assign multiple shift rules to a position.
- Create Employee Manager quickpick lists.

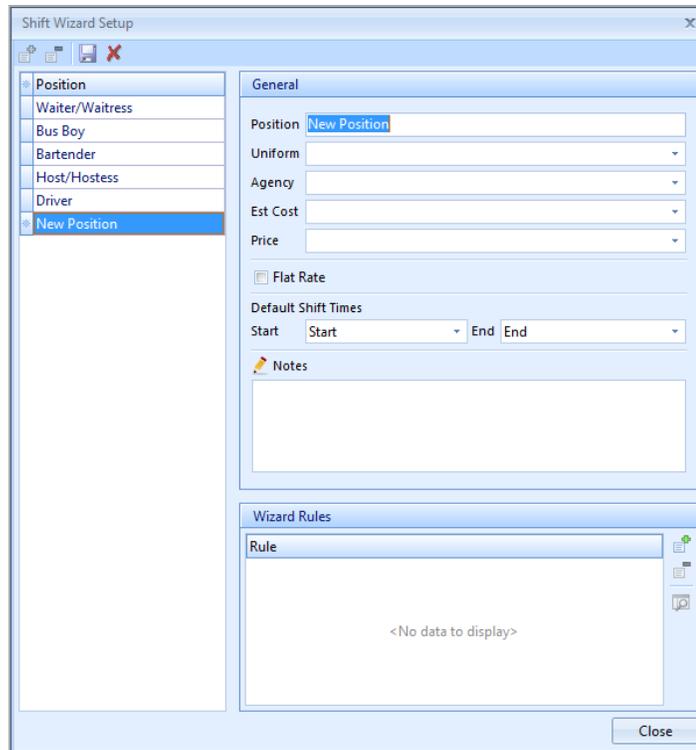
### Adding a Position

You can create and store as many event staff positions as you'd like, such as wait staff, bartenders, busers, hosts/hostesses, delivery drivers, setup staff, etc., and then assign each position its own set price, uniform, or even an employment agency.

1. Click the **Main** button from the Caterase sidebar area.
2. Click the **Employee Manager** button located on the left-hand side of the screen.
3. Click the **Tools** button, located at the top of the Employee Manager window, towards the middle.
4. Select **Shifts Setup**.  
*Result: The Shift Wizard Setup window opens.*
5. Click the **Add Position** button , located at the top left-hand side of the window.  
*Result: A new line is added to the bottom of the Position grid.*
6. Type the name of the new position into the Position field, located in the **General** pane on the right-hand side of the screen.
7. Press **[Enter]** or **[Tab]** to move to the next field.
8. **[Optional]** In the Uniform field, type the name of the uniform or click the down arrow and select an option from the drop-down quickpick list.

*Note: Employee Manager quickpick lists are set up in **Setup > Quickpicks > Employee Manager**.*

9. **[Optional]** In the Agency field, type the agency name or click the down arrow and select an option from the drop-down quickpick list.
10. **[Optional]** Click into the Est Cost field and type the estimated cost (per hour) for the position.  
*Note: You can also enter an estimated shift price by clicking the down arrow and accessing the drop-down calculator.*
11. Click into the Price field and type a default price (per hour) for the shift.  
*Note: You can also enter a shift price by clicking the down arrow and accessing the drop-down calculator.*
12. **[Optional]** Click the **Flat Rate** checkbox to designate the shift price as a flat rate.
13. **[Optional]** Set the **Default Shift Times** by selecting the desired options from the drop-down quickpick list.  
*Note: The **Default Shift Times** are set to Start and End times associated with the sub-event.*
14. **[Optional]** Click into the **Notes** text block and type position notes as desired.
15. **[Optional]** Establish any desired shift rules. (See the topic below.)
16. Click the **Save** button , located at the top left-hand side of the window.  
*Result: The Shift is saved.*
17. Click **Close** to close the window.



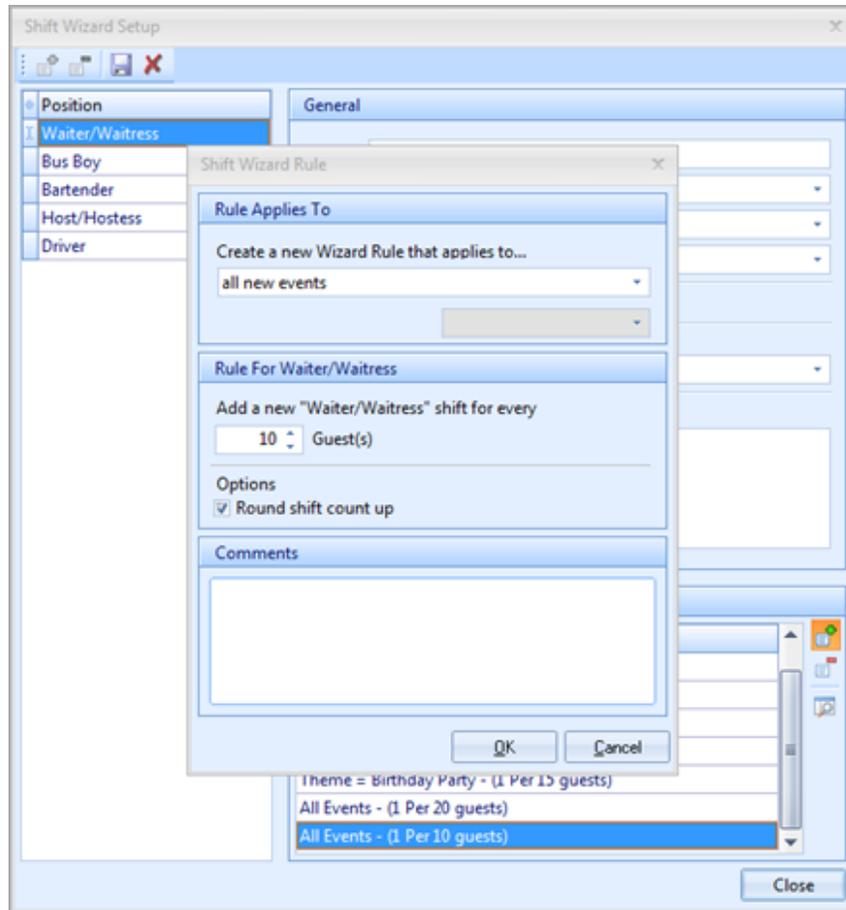
## Establishing Shift Rules

Once you've created your shift position, you can apply various rules to the shift. Maybe you want to establish a rule that, whenever you book a wedding, you want to assign one wait-staff for every ten guests. Choose to add a new shift based on a set number of guests, then apply your shift rule to a certain theme or event category. Once you add an event, CaterEase will apply your shift rules based on the guest count, and will give you the total required amount of staff needed for the event.

### Establishing Shift Rules

1. Click the **Main** button from the CaterEase sidebar area.
2. Click the **Employee Manager** button.
3. Click the **Tools** button, located at the top left-hand side of the Employee Manager screen.
4. Select **Shifts Setup**.  
*Result: The Shift Wizard Setup window opens.*
5. Click a position in the **Position** grid in the left-hand pane, or add a position, as described above.

6. Click the **Add Rule** button , located at the bottom right-hand side of the Shift Wizard Setup window, in the **Wizard Rules** area.  
*Result: The Shift Wizard Rule window opens.*
7. Click the down arrow in the first field beneath **Create a new Wizard Rule that applies to...**
  - all new events (Select this to apply the shift rule to all events)
  - events with a theme of
  - events with a category of
8. If selecting the **Theme** or **Category** option, click the down arrow in the second field and make a selection from the quickpick list.  
*Note: The second field is not active for "All new events."*
9. In the **Rule For...** section, type the number of guests to add for every shift, or use the up-and-down arrows to adjust the number of guests.
10. **[Optional]** Click into the checkbox under **Options** to round the shift count up, if needed.
11. **[Optional]** Click into the **Comments** text block and type any desired shift rule comments.
12. Click **OK** to close the Shift Wizard Rules window.
13. Click the **Save** button , located at the top of the Shift Wizard Setup window.  
*Result: The Shift and Shift Rules are saved.*
14. Click **Close** at the bottom of the Shift Wizard Setup window.



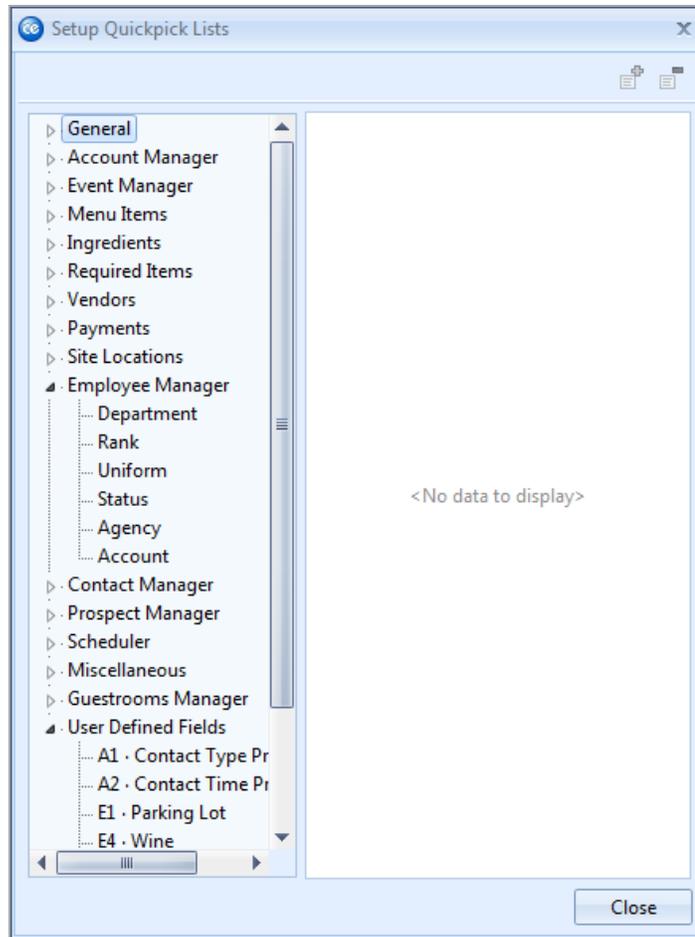
## Creating Employee Manager Quickpick Lists

Throughout your Caterase program, there are several drop-down lists (or quickpick lists) to assist you in data entry. These lists, which are under your control and which can be edited at any time, exist to save you the tedium of double entry and to keep your data consistent.

### Creating Quickpicks

1. From the **Setup** sidebar, click the **Quickpicks** button.  
*Result: The Setup Quickpick Lists window opens.*
2. Click the expand button to the left of **Employee Manager**.
3. Click **Department**.
4. Click the **Add New Item** button , located on the upper right-hand side of the window.  
*Result: A blank field is added.*

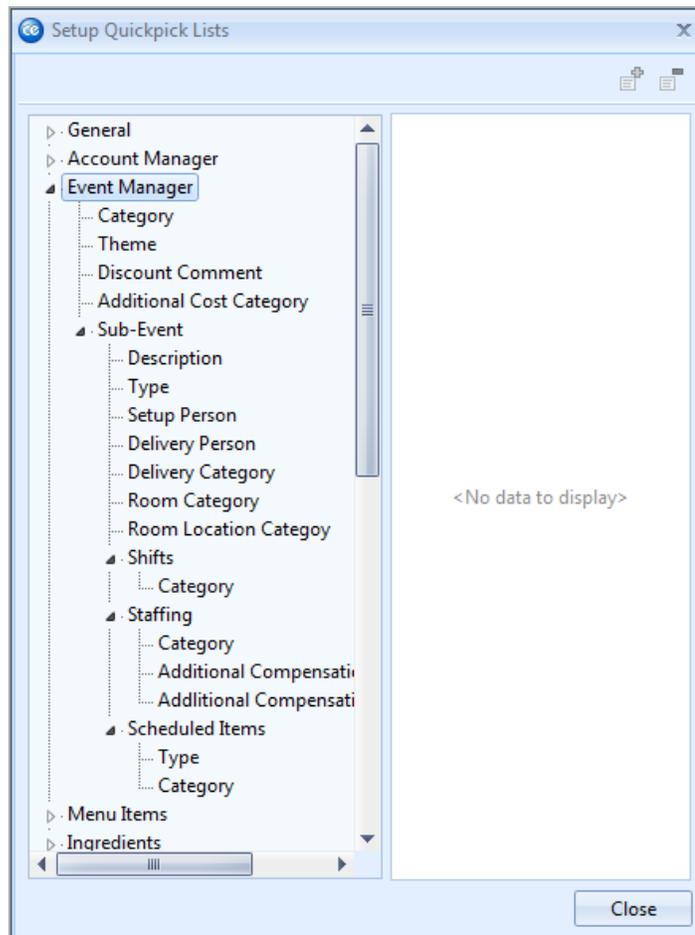
5. Type the quickpick item into the blank field.
6. Follow steps 4 and 5 for Rank, Uniform; Status; Agency; and Account.
7. When finished adding quickpicks, click **Close**.



### Creating Shifts and Staffing Quickpick Lists

1. From the **Setup** sidebar, select **Quickpicks**.  
*Result: The Setup Quickpick Lists window opens.*
2. Click the expand button to the left of **Event Manager** to expand the selection.
3. Click the expand button to the left of **Sub-Event**.
4. Click the expand button to the left of **Shifts**.
5. Click **Category**.

6. Click the **Add New Item** button .  
**Result:** A blank line is added.
7. Type the quickpick item into the blank field.
8. Click the expand field to the left of **Staffing**.
9. Click **Category**.
10. Follow steps 6-7 to add quickpick items to the Additional Compensation Description and Additional Compensation Category fields.
11. When finished, click **Close**.





# Creating a Default List of Employees

## Unit 2: Creating a Default List of Employees

Once you have added shifts or positions for your employees to work, you can add your specific list of employee names. In addition to standard contact information, you can also include such details as which positions each employee works, his or her wage, and even optional external computer files (PDFs, images, spreadsheets, documents) that relate to the employee.

### Objectives:

Upon completing this unit, you will be able to:

- *Add employees to Employee Manager.*
- *Store general and personal employee information.*
- *Assign a position or positions to an employee.*
- *Assign an hourly employee wage and overtime wage.*
- *Add employee-related files to an employee record.*
- *Designate an employee as inactive.*
- *Set an employee work schedule.*
- *Establish employee vacation days.*
- *Show an employee's scheduled events.*
- *View employees by position or by weekday availability.*

### Adding Employees

1. Click the **Main** button from the sidebar area on the left-hand side of your Caterease screen.
2. Click the **Employee Manager** button.
3. Click the **Add Record** button , located at the top of your Caterease screen.

**Result:** *A confirmation window opens.*

4. Click **Yes** to confirm your choice.  
**Result:** *A new employee field is added to the top of the list, with the cursor in the Last field.*  
**Note:** *The Employee #, located above the Last field, is auto-assigned by Caterease.*

5. Type the employee's last name into the Last field.
6. Press **[Enter]** or **[Tab]** to move to the next field.
7. Fill out the remaining **General** tab fields by typing directly into the field or by selecting the quickpick items from the corresponding drop-down lists.  
**Note:** *Press **[Tab]** or **[Enter]** to move from field to field.*

8. **[Optional]** Add any extra fields to your screen, remembering to click the **Save Current Window Settings** button  to save your new view.

### Filling Out the Address Tab

1. Click the **Address** tab, located to the right of the **General** tab, on the main Employee Manager screen.
2. Under **Home Address**, click into the Address field and type the employee's home address.
3. Press **[Enter]** or **[Tab]** to move to the next field.
4. Continue to complete the home address information by typing into each field and pressing **[Enter]** or **[Tab]** to move to the next field.
5. Under **Mailing Address**, click into the Address field and type the employee's mailing address.
6. Continue to complete the mailing address information by typing into each field and pressing **[Enter]** or **[Tab]** to move to the next field.

### Adding Additional Employee Information

1. **[Optional]** Click the **Notes** tab, located at the top right-hand side of the screen.
2. Click into the white text block and type any notes associated with the employee.  
*Note: You may also access the Scratch Pad to insert pre-typed notes by clicking the **Scratch Pad** button , selecting (highlighting) the text, and clicking the **Insert Text** button.*
3. **[Optional]** Click the **Skills** tab, located to the right of the **Notes** tab, at the top of the screen.
4. Click into the white text block and type employee skills information, or use the Scratch Pad to insert pre-formatted text.  
*Note: You may format your text in both the **Notes** and **Skills** tabs by right-clicking into the text block and selecting **Font** or by using the **Format** toolbar at the top left-hand side of the screen.*
5. **[Optional]** Click the **Emergency** tab, located at the top of the screen, click into the white text block, and enter employee emergency contact information or medical-related information.

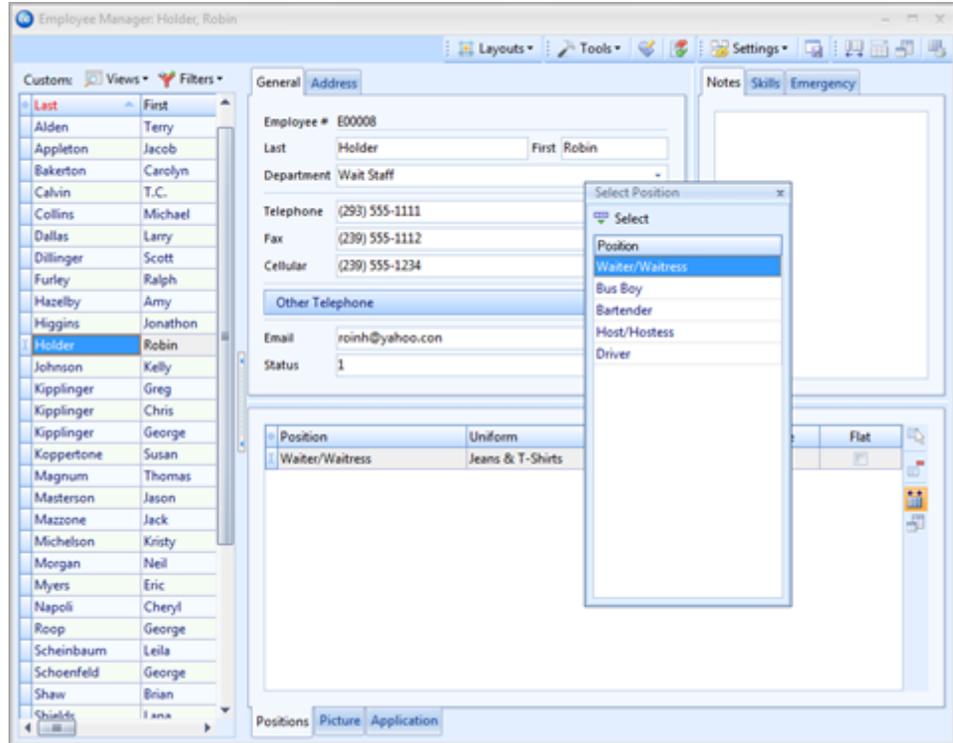
6. **[Optional]** To add a picture of the employee, click into the **Picture** tab, located at the bottom of the screen, right-mouse click into the empty text block, select **Load From File** from the pop-up, then browse to a stored employee picture.
7. **[Optional]** To attach the employee's employment application, click into the **Application** tab, located at the bottom of the screen, right-mouse click into the text block, select **Load From File** from the pop-up, then browse to a stored application.

## Assigning a Position to an Employee

Once you've entered your basic employee information into Employee Manager, you must assign that employee a position if you want to be able to select the employee for an event. You can assign an employee multiple positions and then select the employee for the event according to the desired position you are filling.

### Assigning a Position

1. From the Employee Manager main screen, click the **Positions** tab, located at the bottom of the screen.
2. Click the **Select Positions for Employee** button , located on the right-hand side of the screen, towards the middle.  
**Result:** *The Select Position window opens.*
3. Double-click on a position to select it.  
**Result:** *The position is selected and appears in the **Positions** tab grid.*
4. Click the X at the top of the Select Position window.
5. **[Optional]** Click into the Uniform field and select the required uniform from the drop-down list.  
**Note:** *Uniform information will default if already assigned in the Shift Setup area.*
6. Press **[Tab]** or **[Enter]** to move to the next field.
7. Click into the Reg Wage field and type the employee regular hourly wage.  
**Note:** *You may also click the down arrow to the right of the field to access the drop-down calculator.*
8. **[Optional]** Click into the Overtime field and type the employee overtime wage.  
**Note:** *You may also click the down arrow to access the drop-down calculator.*
9. If the wage is a flat rate, click into the Flat field to place a check mark.



## Adding Employee Related Files

If you have any computer files (Word documents, Excel spreadsheets, PDF files, etc.), that are somehow related to an employee, you can associate those files to the employee in Employee Manager. You can choose to embed a copy of each file into the Caterase database or, if you plan to make future changes to the file, you can establish a link to the file itself.

### Adding Employee Related Files

1. Select an employee from the grid in Employee Manager by clicking on the employee name.
2. Click the **Employee Related Files** button , located at the top right-hand side of the Employee Manager window.  
**Result:** *The Employee Related Files window opens.*

3. Click the **Add File** button , located on the right-hand side of the Employee Related Files window.  
**Result:** *A confirmation message appears.*

4. Choose to “Embed the existing file into the database” or “Establish a link to the existing file” by clicking the corresponding radio button.  
**Note:** *Embedding the file into the database copies the file in its current form*

and attaches it as a permanent record; establishing a link to a file will connect this file to a file on your computer or network that you may change over time. (When establishing a link to a file that is not saved on your computer, you will only be able to review that file when your computer has access to it.)

5. Click **Yes**.  
**Result:** A Browse window opens.
6. Browse your way to the file you want to associate with this employee, and select it.
7. Click **Open**.  
**Result:** The selected file is associated with this employee.
8. **[Optional]** Enter a **Comment** to describe the file or its relationship to the event.
9. When finished, click the X at the upper right-hand side of the window.

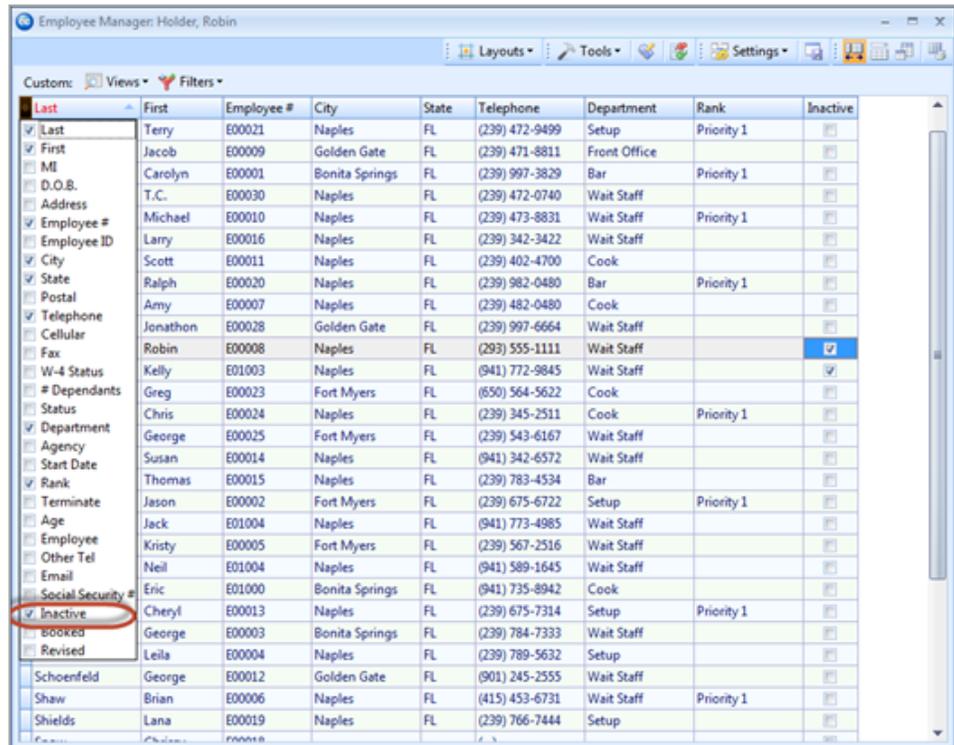
## Making an Employee Inactive

You have event staff that are seasonal or are in school and work only during the times they are out of school. Instead of keeping these employees in your available event staffing list all the time, you can make certain staff members inactive, and they will be removed from your event staffing selection list. When the inactive employees return to work, you can then reactivate them.

### Making an Employee Inactive

1. Click the **Main** sidebar item from your main Caterease screen.
2. Click the **Employee Manager** button.
3. Click the **Display Full Grid** button , located at the top right-hand side of the screen.  
**Result:** The Employee Manager is displayed as a full grid.
4. Click the **Quick Column Customizing** button , located on the upper left-hand side of the screen, to the left of the Last field.  
**Result:** A drop-down list displays.
5. Click into the Inactive checkbox.  
**Result:** A check appears in the checkbox and the Inactive column displays in the grid.

- Select an employee and click into the corresponding Inactive checkbox.  
**Result:** A check appears in the checkbox, indicating the employee is now inactive and will not be displayed for any future events.
- Click the **Save Current Window Settings** button  if you would like the new layout (reflecting the **Inactive** column) to serve as your default.



## Setting a Defined Employee Work Schedule

With Employee Manager, you are able to designate the days and times an employee is unavailable for work. You can mark an employee as unavailable all day or unavailable within a time range on a given day of the week. Once these days or time ranges are established, you will be able to view which employees are available or unavailable for an event.

### Setting an Employee Work Schedule

- From the **Tools** button at the top of your Employee Manager screen, select **Work Times**.  
**Result:** The *Enter Weekdays And Times Employee CANNOT Work* window opens.
- Click into a **Weekdays** checkbox.

3. Click either the **All Day** or **Within Times** radio button.  
*Note: Selecting **Within Times** will enable access to the Time Ranges From and To fields.*
4. If **Within Times** is selected, type a **From** and a **To** time.  
*Note: You are able to set two daily time ranges per day.*
5. Continue establishing days/times the employee is unable to work, as described above.
6. When finished, click **OK** to close the window.

Weekdays	Cannot Work	Time Ranges			
		From	To	From	To
<input checked="" type="checkbox"/> Monday	<input type="radio"/> All Day <input checked="" type="radio"/> Within Times	09:00 AM	12:00 PM	06:00 PM	08:00 PM
<input type="checkbox"/> Tuesday	<input checked="" type="radio"/> All Day <input type="radio"/> Within Times				
<input checked="" type="checkbox"/> Wednesday	<input checked="" type="radio"/> All Day <input type="radio"/> Within Times				
<input type="checkbox"/> Thursday	<input checked="" type="radio"/> All Day <input type="radio"/> Within Times				
<input checked="" type="checkbox"/> Friday	<input type="radio"/> All Day <input checked="" type="radio"/> Within Times	09:00 AM	12:00 PM	06:00 PM	08:00 PM
<input type="checkbox"/> Saturday	<input checked="" type="radio"/> All Day <input type="radio"/> Within Times				
<input type="checkbox"/> Sunday	<input checked="" type="radio"/> All Day <input type="radio"/> Within Times				

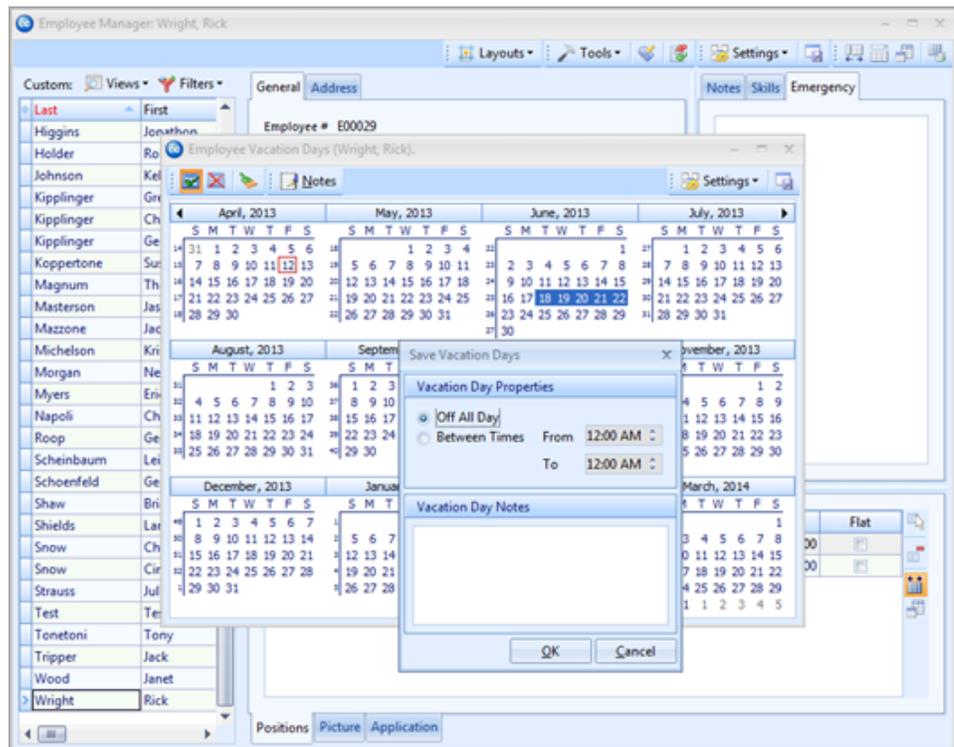
## Setting an Employee Work Schedule That Varies from Week to Week

What if you have employees who are students or staff members who work other jobs and their availability varies on a week-by-week basis? Via the Vacations section of Employee Manager, you can mark the individual dates and times an employee cannot work.

### Setting a Work Schedule That Varies

1. Click on the name of the employee whose weekly availability you would like to set.
2. From the **Tools** button at the top of your Employee Manager screen, select **Vacations**.  
*Result: The Employee Vacation Days window opens.*
3. Click and hold the left mouse button on the desired start date.
4. Hold down your left mouse button, drag to the end date, and release the mouse button.

5. Click the **Set Selected Dates** button  , located on the upper left-hand side of the window.  
*Result: The Save Vacation Days window opens.*
6. Click the **Off All Day** radio button or the **Between Times** radio button.  
*Note: If **Between Times** is selected, the From and To time fields are activated.*
7. **[Optional]** Click in the **Vacation Day Notes** text block and type any relevant notes.
8. When finished, click **OK**.



## Establishing Employee Vacation Days

The Vacations section allows you to create and store vacation days for your employees. When vacation days are set, the employee will be marked as unavailable to work events during the assigned vacation dates. Once an employee’s vacation dates have passed, you can clear all the vacation days, with one click of the mouse button.

### Setting Employee Vacation Days

1. From the Employee Manager screen, click on the name of the employee

whose vacation dates you would like to set.

2. Click the **Tools** button at the top of your Employee Manager screen and select **Vacations**.

**Result:** *The Employee Vacation Days window opens.*

3. Click and hold the left mouse button down on the vacation start date.

4. Drag the mouse to the end date and release the mouse button.

5. Click the **Set Selected Dates** button  from the top of the screen.

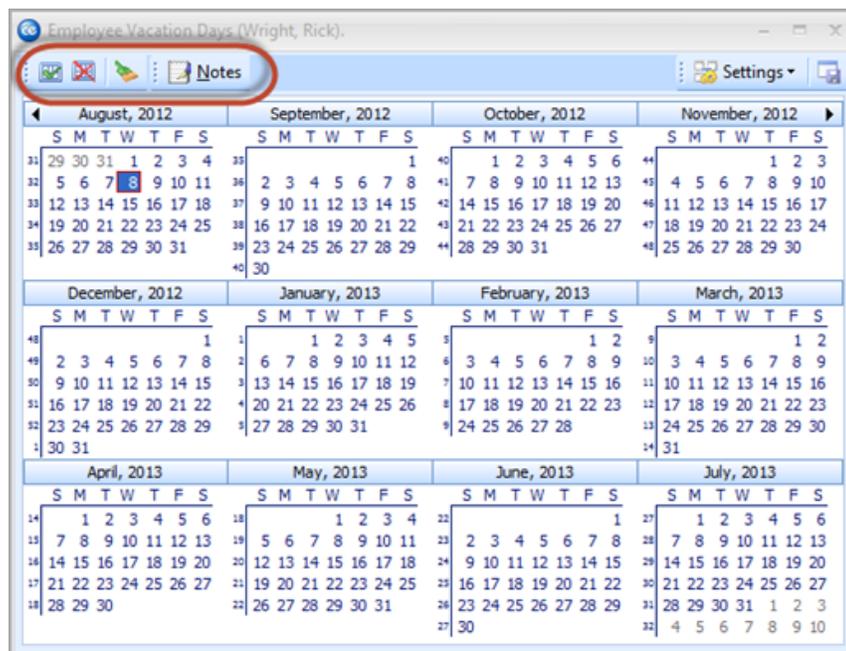
**Result:** *The Save Vacation Days window opens.*

6. Click either the **Off All Day** radio button or the **Between Times** radio button.

**Note:** *If **Between Times** is selected, the From and To time fields are enabled.*

7. **[Optional]** Click in the **Vacation Day Notes** text block and type any relevant notes.

8. When finished, click **OK**.



### Clearing Selected Vacation Dates

1. From the Employee Manager screen, click on the name of the employee whose vacation dates you would like to clear (remove).

2. Click the **Tools** button at the top of your Employee Manager screen and select **Vacations**.  
*Result: The Employee Vacation Days window opens.*
3. Click and hold the left mouse button on the vacation start date you would like to clear.
4. Drag the mouse to the vacation end date you would like to clear.
5. Click the **Clear Selected Dates** button .  
*Note: To remove only one vacation day, click on the desired day you would like to clear and click the **Clear Selected Dates** button .*
6. Click the X at the top right-hand side of the screen to close the window.

### Clearing All Vacation Dates

1. From the Employee Manager screen, click on the name of the employee whose vacation dates you would like to clear (remove).
2. Click the **Tools** button at the top of your Employee Manager screen and select **Vacations**.  
*Result: The Employee Vacation Days window opens.*
3. Click the **Clear All Calendar Vacation Days** button  to remove all vacation days for a particular employee.  
*Result: A confirmation prompt appears.*
4. Click **Yes** to confirm your choice.
5. Click the X at the top right-hand side of the screen to close the window.

### Adding Vacation Notes

1. From the Employee Manager screen, click on the name of the employee you would like to add a vacation note for.
2. Click the **Tools** button at the top of your Employee Manager screen and select **Vacations**.  
*Result: The Employee Vacation Days window opens.*
3. Click the **Notes** button.
4. Type into the text block as desired.
5. **[Optional]** Right-click into the field, highlight the text, and select **Font** if you would like to format the text.
6. Click the X at the top right-hand side of the screen to close the window.

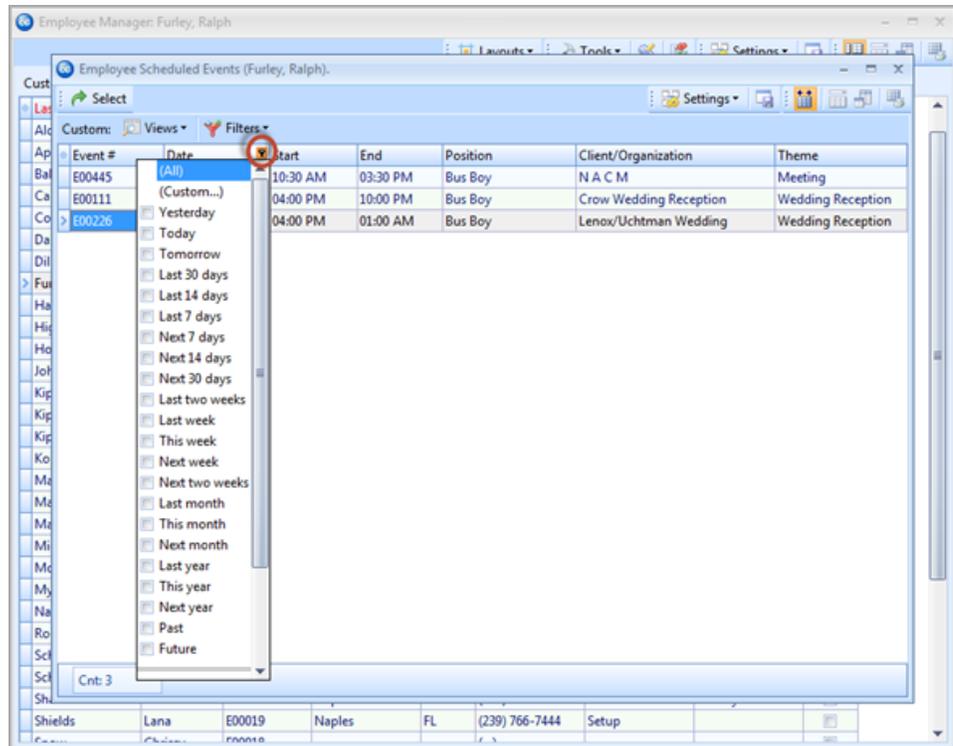
## Showing an Employee's Scheduled Events

You can print a grid that displays all past, present, and future events for each employee. From this grid you can sort, group, and filter the grid data, add or remove columns, or print or export the grid as a custom report.

### Showing an Employee's Scheduled Events

1. From the Employee Manager screen, click on the name of the employee whose scheduled events you would like to view.
2. From the **Tools** button at the top of your Employee Manager screen, select **Employee Schedule**.  
*Result: The Employee Scheduled Events window opens.*
3. Place your mouse cursor on the Date column.  
*Result: A funnel icon appears.*
4. Click the funnel icon, select a relative date, and click the corresponding checkbox.
5. **[Optional]** Customize the grid by sorting or grouping the grid.
6. **[Optional]** Display additional columns by accessing the **Quick Column Customizing** button  on the left-hand side of the screen.

*Note: Click the **Save Current Window Settings** button  if you would like this layout to serve as your new default view.*



## Viewing Employees by Position

You can print a grid that displays the position or positions associated with a particular employee. From this grid you can sort, group, and filter the grid data, add or remove columns, or print or export the grid.

### Viewing Employees by Position

1. From the **Tools** button at the top of your Employee Manager screen, select **Employees by Position**.

*Result:* The *Employees by Position* window opens.

2. **[Optional]** Customize the grid by sorting or grouping the grid data.

*Note:* See the *Queries and Detail Grids user manual* for more information about the various ways you can customize Caterease grids.

3. Click the plus sign to the left of a field to expand the selection.

4. **[Optional]** Display additional fields by accessing the **Quick Column Customizing** button .

*Note:* Remember to click the **Save Current Window Settings** button  if you would like the new layout to serve as your default view.

Employee	Position	Uniform	Reg Wage
+ Position : Bartender (Cnt 7)			
+ Position : Bus Boy (Cnt 12)			
+ Position : Host/Hostess (Cnt 3)			
- Position : Waiter/Waitress (Cnt 23)			
Alden, Terry	Waiter/Waitress	Black Tie	\$7.00
Bakerton, Carolyn	Waiter/Waitress	Black Tie	\$7.00
Collins, Michael	Waiter/Waitress	Black Tie	\$7.00
Dallas, Larry	Waiter/Waitress	Black Tie	\$7.00
Dillinger, Scott	Waiter/Waitress	Black Tie	\$7.00
Hazelby, Amy	Waiter/Waitress	Black Tie	\$7.00
Johnson, Kelly	Waiter/Waitress	Black Tie	\$7.00

## Viewing Employees by Weekday Availability

You can generate a list of available employees for a particular day of the week so you will know, at a glance, who has been designated in Employee Manager as being available to work a shift, as well as any employees who have work conflicts on a given day.

### Viewing Employees by Weekday Availability

1. From the **Tools** button at the top of your Employee Manager screen, select **Employees by Weekday Availability**.  
*Result: The Employees by Weekday Availability window opens.*
2. Click the drop-down arrow next to **Day of Week** to select a day of the week for which you would like to create a list of available employees.  
*Result: The window automatically adjusts to reflect your selection.*
3. Click the X at the top right-hand side of the window to close the window.

Employees by Weekday Availability

Day Of Week: Tuesday

Employee	Telephone	City	Conditions
Myers, Eric	(941) 735-8942	Bonita Springs	Cannot Work: 12:00 a...
Strauss, Julie	(941) 579-2498	Naples	
Johnson, Kelly	(941) 772-9845	Naples	
Morgan, Neil	(941) 589-1645	Naples	Cannot Work: 12:00 a...
Bakerton, Carolyn	(239) 997-3829	Bonita Springs	
Masterson, Jason	(239) 675-6722	Fort Myers	
Roop, George	(239) 784-7333	Bonita Springs	
Scheinbaum, Leila	(239) 789-5632	Naples	
Michelson, Kristy	(239) 567-2516	Fort Myers	
Shaw, Brian	(415) 453-6731	Naples	
Hazelby, Amy	(239) 482-0480	Naples	
Holder, Robin	(293) 555-1111	Naples	
Appleton, Jacob	(239) 471-8811	Golden Gate	
Schoenfeld, George	(901) 245-2555	Golden Gate	
Napoli, Cheryl	(239) 675-7314	Naples	



# Staffing Events in Event Manager

## Unit 3: Staffing Events in Event Manager

The Staffing tab in the Event Manager allows you to select individual employees for an event, including waitstaff, bartenders, bus staff, hosts/hostesses, etc. In addition, the Staffing tab can simply be used to determine how many position shifts are required to fully staff the event. You can select a position, then select employees to book them for a shift. When an employee affirms he/she can work the shift, you can then mark them as confirmed.

The Start and End times you have entered for the sub-event will default as the Start and End times for each employee, although you can change those times, if desired. The program will automatically calculate total wages and total staff pricing based on employee and shift information that you are free to set up in advance and/or modify on-the-fly.

### Objectives:

Upon completing this unit, you will be able to:

- *Select employees to work an event.*
- *View employee staffing conflicts.*
- *Select unavailable employees to work an event.*
- *Customize the staffing grid.*
- *Add additional employee compensation.*
- *Select a position for an event.*
- *Book an employee to a position shift.*
- *Confirm an employee to a position shift.*

### Adding Shifts to an Event

1. Open Event Manager by clicking the **Event Manager** button from the **Main** Caterease sidebar.
2. Select an event using the Event Manager search tools.  
*Note: Refer to the Booking Your First Event user manual for detailed information about searching for and selecting an event in Event Manager.*
3. On the **Sub-Event** display, select a sub-event (if more than one) to which you will be adding staff.
4. Click the **Staffing** tab at the bottom of the screen.
5. Click the **Select Staff** button  at the top right-hand side of the Staffing screen.

**Result:** The *Select Staffing For Event* window opens.

**Note:** Remember, you can optionally establish Wizard rules for each of your shifts.

6. Click any position (waiter/waitress, bus boy, bartender, etc.), from the left-hand side of the screen, or optionally hold your **[Ctrl]** key down to select other positions simultaneously.  
**Note:** You can also simply double-click an individual position to retrieve it.
7. **[Optional]** Click the **View Shift Rules** button  to see the specific rule (if you created one) that the program used to calculate the required number for a particular shift.
8. When finished adding shifts, click **OK**.

### Selecting an Employee to Work an Event

1. Open Event Manager.
2. Select an event using the Event Manager search tools.
3. On the **Sub-Event** display, select a sub-event (if more than one) to which you will be adding staff.
4. Click the **Staffing** tab at the bottom of the screen.

5. Click the **Select Staff** button  at the top right-hand side of the Staffing screen.

**Result:** The *Select Staffing For Event* window opens.

6. Select any available employee from the right-hand side of the screen, under **Employee** (drag your mouse or use your **[Ctrl]** key to select more than one employee at a time).

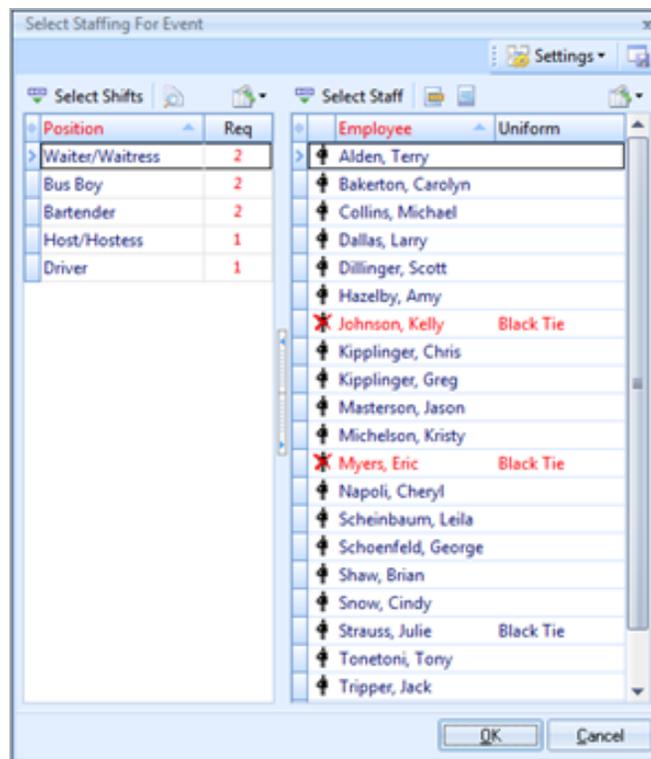
7. **[Optional]** Click the **View Staffing Conflicts** button , located at the top right-hand side of the window, to view any staffing conflicts.

**Note:** Review the text which displays for employee conflict details. (If an employee has a staffing conflict, his/her name will appear in red text.) Possible conflicts include employees not able to work during a particular time of day, on a particular day, on a particular date, or perhaps the employee is working another event.

8. When finished adding staff, click **OK**.
9. Edit any fields (time, wage, price, etc.), as desired.
10. Click **OK** to close the window or opt to allow selection of unavailable employees (see next section).

### Selecting Unavailable Employees

1. From the **Sub-Event** display in Event Manager, select a sub-event (if more than one) to which you will be adding staff.
2. Click the **Staffing** tab at the bottom of the screen.
3. Click the **Select Staff** button  at the top right-hand side of the Staffing screen.  
*Result: The Select Staffing For Event window opens.*
4. Click on the name of the "unavailable" employee you would like to select.  
*Note: An unavailable employee's name appears in red text.*
5. Click the **Settings** button at the top of the Select Staffing For Event window.
6. Select **Staff Selection** and choose **Allow Selection of Unavailable Employees**.
7. Click the name of an unavailable employee to select him/her.
8. Click the **Select Staff** button.  
*Note: Alternatively, you may simply double-click the selection.*
9. Click **OK** to close the window.

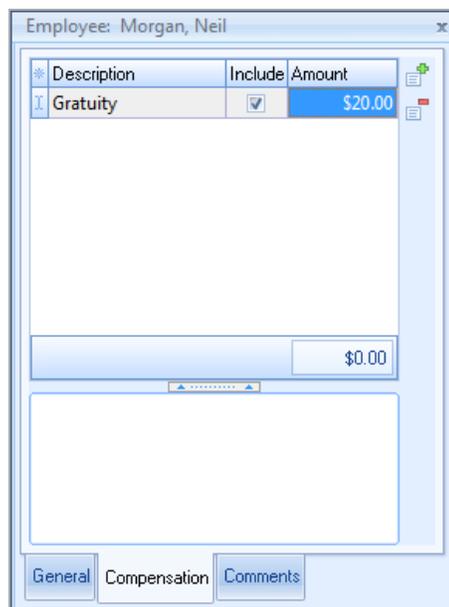


## Adding Additional Employee Compensation

What if you split additional gratuities with your staff? Or what if you offer travel reimbursements to employees? You can store these additional employee wages separately from event wages.

### Adding Additional Employee Compensation

1. From the **Sub-Event** display in Event Manager, click the **Staffing** tab and then click on any employee name within the Event Staffing grid.
2. Click the **Show Staffing Details** button .  
*Result: The Employee window opens.*
3. Click the **Compensation** tab, located at the bottom of the window.
4. Click the **Add Record** button , located at the upper right-hand side of the screen.
5. Type into the Description field or click the down arrow and select from the drop-down quickpick list.
6. **[Optional]** Click into the **Include** checkbox to include the additional wage.
7. **[Optional]** Type into the Category field (not displayed by default) or click the down arrow and select from the drop-down quickpick list.
8. Type the additional compensation amount into the Amount field, or click the down arrow to the right of the field to access the drop-down calculator.
9. Click the X at the top right-hand side of the window to close the window.





## Unit 4: Managing Multiple Shifts

The Shift Manager (available if you own the Professional version of Caterease) allows you to manage a day or date range of multiple shifts at one time. From here you can book employees to multiple shifts, send out e-mail confirmation requests, and confirm the employee to work, all with one click of the mouse.

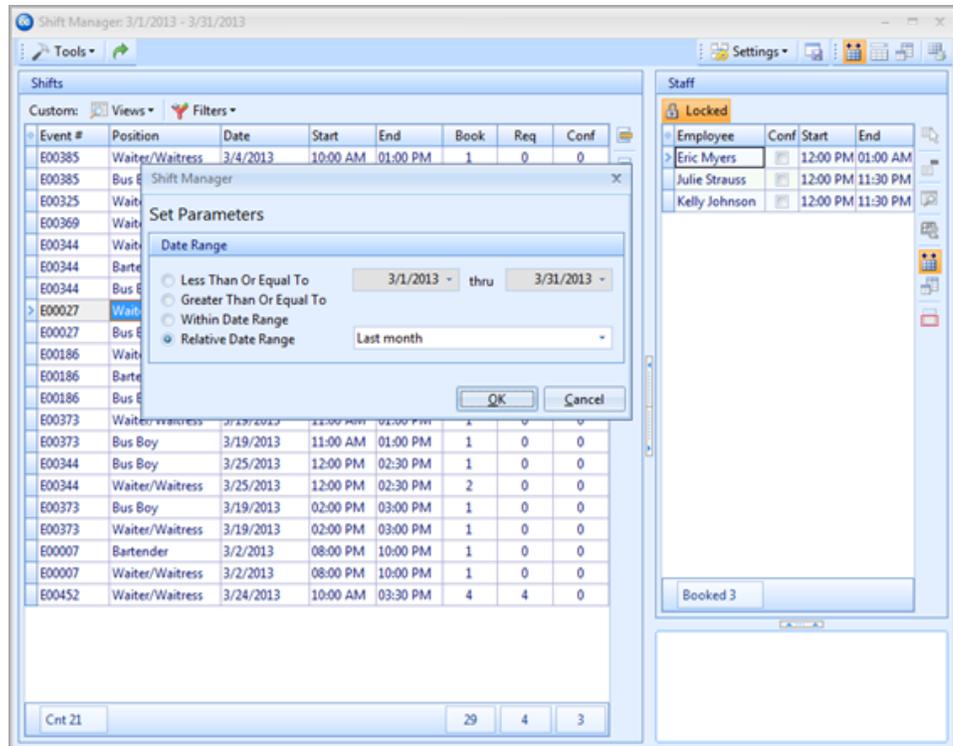
### Objectives:

Upon completing this unit, you will be able to:

- *Display a day or date range of shifts in the Shift Manager grid.*
- *Send confirmation request via batch e-mail.*
- *Confirm staff to multiple event shifts.*

### Displaying a Day/Date Range of Shifts

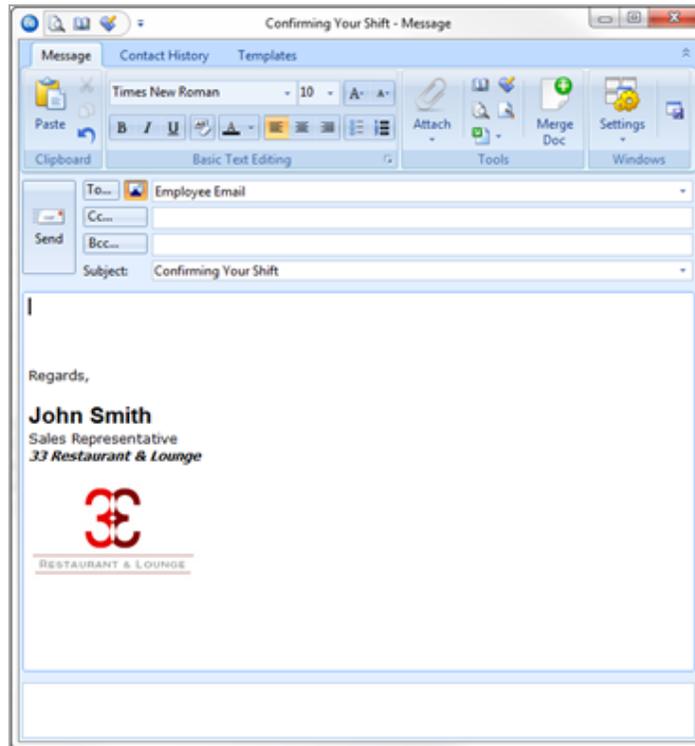
1. Click the **Tools** sidebar item from the left-hand side of your Caterease screen.
2. Click the **Shift Manager** button.  
**Result:** *The Shift Manager screen opens.*
3. Click the **Tools** button, located at the upper left-hand side of the screen, and choose **Set Date Range**.  
**Result:** *The Shift Manager window opens, where you can set your date range.*
4. Select the desired parameter by clicking the corresponding radio button. Choose from among the following options:
  - **Less Than Or Equal To**
  - **Greater Than Or Equal To**
  - **Within Date**
  - **Relative Date Range**  
**Note:** *Click the down arrow to the right of the Relative Date Range field and select a relative date range from the drop-down list.*
5. Click **OK** to generate the query.



### Batch E-mailing a Confirmation Request

1. Click the **Tools** sidebar item from the left-hand side of your screen.
2. Click the **Shift Manager** button.
3. Set a date range by clicking the **Tools** button, located on the upper left-hand side of the screen, and clicking **Set Date Range**.
4. Click on a shift in the grid.
5. Click the **Locked** button, located on the upper right-hand side of the window.  
**Result:** A confirmation prompt appears.
6. Click **Yes** to confirm your choice.  
**Result:** The Staff section is unlocked and employees can be booked for the event.
7. Click on an employee name from the right-hand (Staff) pane or hold your **[Ctrl]** key down and click multiple employee names (or click **[Ctrl]** **[A]** to select all employees).
8. Click the **Email** button from the main toolbar at the top of your screen.  
**Result:** An e-mail window opens.

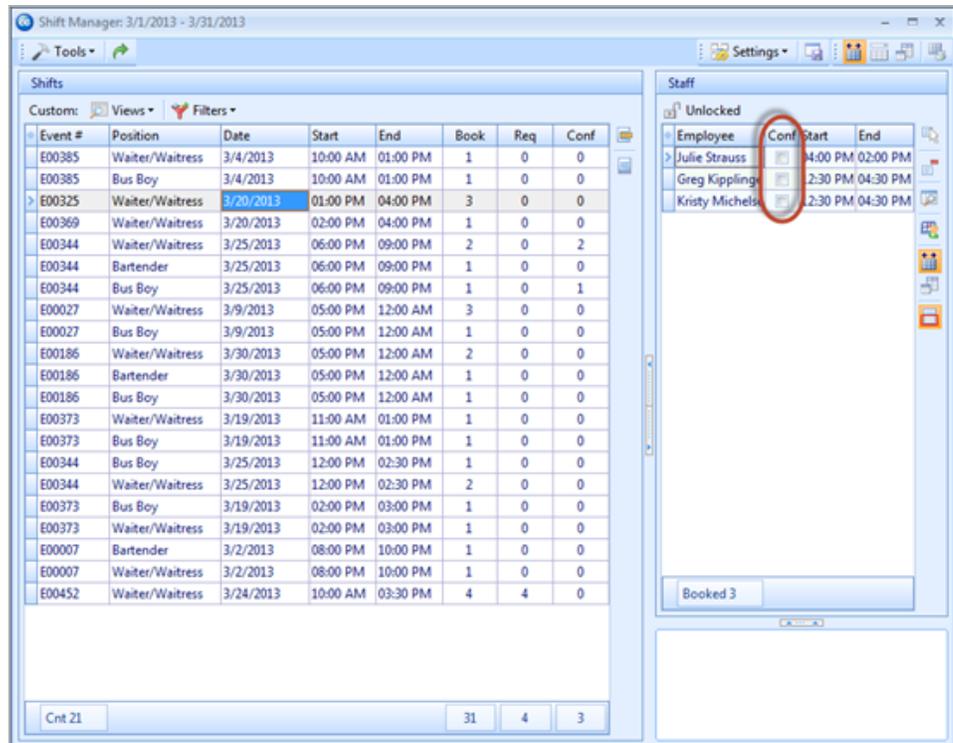
9. Type an e-mail subject into the Subject field or click the down arrow and select an e-mail subject from the drop-down quickpick list.
10. Click into the text block and type the body of the e-mail.  
*Note: If you own the Marketing Tools Package, you can click the **Merge Doc** button and select a custom merge document as the body of the outgoing e-mail.*



### Confirming Staff for an Event

1. Click the **Tools** sidebar item from the left-hand side of your screen.
2. Click the **Shift Manager** button.
3. Set a date range by clicking the **Tools** button, located on the upper left-hand side of the screen, and clicking **Set Date Range**.
4. Click on a shift in the grid.
5. Click the **Locked** button.  
*Result: A confirmation prompt appears.*
6. Click **Yes** to confirm your choice.  
*Result: The Staff section is unlocked and employees can be booked for the event (from the right-hand side of the screen).*

7. Click the **Conf.** (Confirm) checkbox to confirm the employee or employees will work an event.
8. **[Optional]** Edit employee work times, if needed.
9. When finished, click the **Unlocked** button to lock staff selection.
10. Click the X at the top right-hand corner of the window to save the changes and close the window.





## Unit 5: Tracking Employee Information

### Objectives:

Upon completing this unit, you will be able to:

- *View employee staffing using multiple calendar views.*
- *Create groups of employee staffing calendars.*
- *Generate an employee staffing schedule report for any date range.*
- *Generate an employee staffing schedule in a diary format.*
- *Generate a report of all scheduled shifts within a day or date range.*
- *Track all staffing activity for any date range.*

### Viewing Staffing in a Calendar

You can view your scheduled staffing in multiple calendar displays: a day-at-a-glance; week-at-a-glance; a custom work-week-at-a-glance; month-at-a-glance; year-at-a-glance; or a daily timeline view.

1. Click the **Scheduler** button, located on the **Main** Caterease sidebar.
2. Click the **Display** button, located at the top of the screen, and select **Staffing**.

**Result:** *The Staffing calendar opens, by default, to the month-at-a-glance view.*

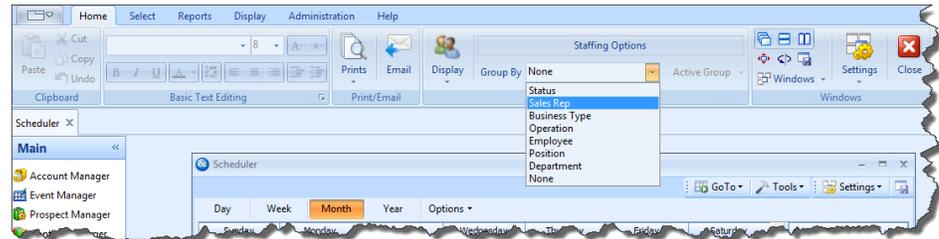
**Note:** *You can also view staffing information in the Staffing calendar grid. You can add/remove columns, sort grid data, group grid data, print the grid, or export the data.*

### Creating Groups of Staffing Calendars

The powerful grouping option in the Scheduler tool lets you create separate calendars based on a variety of staffing details.

1. Click the **Scheduler** button, located on the **Main** Caterease sidebar.
2. Click the **Display** button and select **Staffing**.
3. Click the down arrow next to the **Group By** option at the top of the screen.
4. Select one of the following fields from the list to separate your staffing into groups: Status; Sales Rep; Business Type; Operation; Employee; Position; Department; or None.

**Result:** The Staffing calendar is grouped into separate calendars.



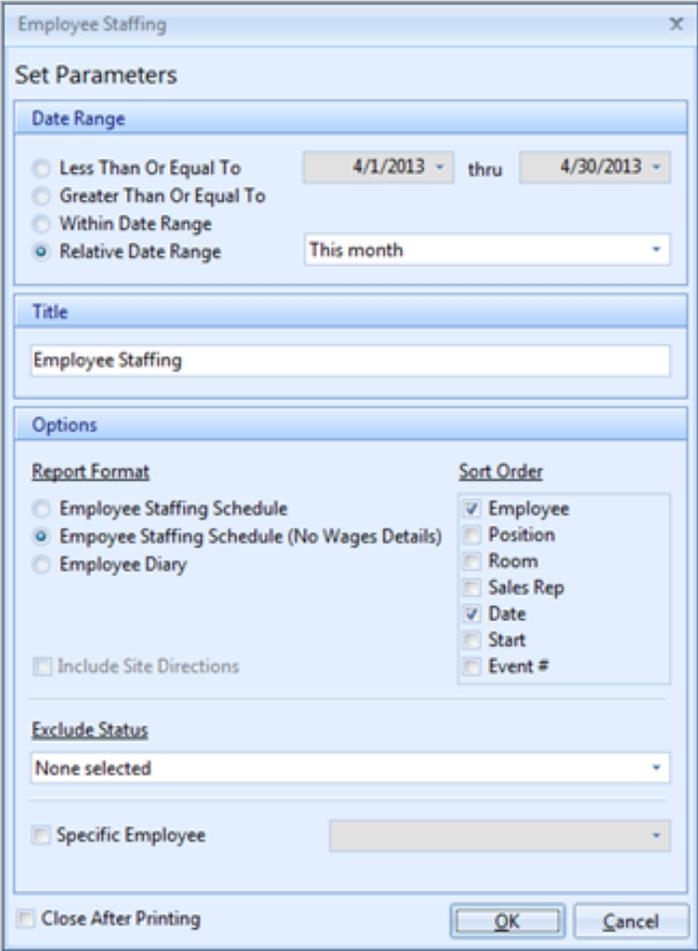
## Printing an Employee Staffing Schedule

The Employee Staffing Report will allow you to print an employee schedule based on a day or date range for an individual employee or for all employees. Information in this report includes the assigned position; the event client; the event theme; the assigned room; the employee start and end times; and the total number of event work hours. In addition, the report will identify employees that are confirmed to work their assigned event.

### Printing an Employee Staffing Schedule

1. Click **Reports > Management > Employee Staffing**.  
*Result: The Employee Staffing window opens.*
2. Set a date range for your report by choosing the option **Less Than Or Equal To, Greater Than Or Equal To, Within Date Range, or Relative Date Range**.
3. **[Optional]** Change the title of the report by typing over the words "Employee Staffing."
4. Select from among Employee Staffing Schedule, Employee Staffing Schedule (No Wage Details), or Employee Diary.  
*Note: Selecting **Employee Diary** enables you to print separate employee schedules in diary format rather than in a grid layout. With diary format, each print will include the event date; the assigned position; employee start and end times; the client's name, address, and phone number; the assigned room; the confirmed date; and the time, party name, and event theme. Off-premise caterers can choose to include the site location information as well.*
5. **[Optional]** Click the checkboxes under **Sort Order** and choose to group Staffing items by a certain detail.  
*Note: You can drag and drop these fields to create a sort order.*
6. **[Optional]** Click the **Include Site Directions** checkbox if you would like to include the directions to the site location in the report.

- 7. **[Optional]** Exclude any desired statuses by selecting the status from the **Exclude Status** drop-down list. Choose from among Closed, Prospective, Tentative, Cancelled, and Definite.
- 8. **[Optional]** For an individual employee schedule, click the **Specific Employee** checkbox and then click the corresponding down arrow and select an employee.
- 9. Click **OK** to generate the report.  
*Result: The Employee Staffing Report is generated, incorporating the parameters you established.*



### Printing a Scheduled Shifts Report

The Scheduled Shifts Report is a powerful tool which allows you to print a schedule of a shift or all shifts based on a day or date range. You can even choose to display the name or names of the employees assigned to work the shift, along with addi-

tional staffing information. Additionally, the Scheduled Shifts Report will even give you the option of grouping the report based on selected event information.

### **Printing a Scheduled Shifts Report**

1. Click **Reports > Management > Scheduled Shifts**.  
*Result: The Scheduled Shifts window opens.*
2. **[Optional]** Change the title of the report by typing over the words "Scheduled Shifts."
3. Set a date range for your report by choosing the option **Less Than Or Equal To, Greater Than Or Equal To, Within Date Range, or Relative Date Range**.
4. **[Optional]** Exclude an desired statuses by selecting the status from the drop-down list. Choose from among Closed, Prospective, Tentative, Cancelled, and Definite.
5. **[Optional]** Group by Date, Shift, Sales Rep, or Client by selecting the respective option from the **Group By** drop-down list.
6. **[Optional]** Click the **Specific Shift** checkbox, then the corresponding down arrow and select a position from the drop-down list.
7. **[Optional]** Click the **Show Staffing Details** checkbox to include the assigned employee information.
8. **[Optional]** Click the **Suppress Fully Booked & Confirmed Shifts** checkbox to show just the shifts that require staffing.
9. Click **OK** to generate the report.  
*Result: The Scheduled Shifts report is generated, incorporating the parameters you established.*

## Running a Staffing Activity Query

The Staffing Activity Query is designed to track all employees you have booked for any day or date range. As with other activity queries, you can sort, group, or filter your data and answer various questions about your employee staffing activity.

### Running a Staffing Activity Query

1. Click the **Queries** button from the **Main** Caterease sidebar.
2. Click the **Staffing Activity** button on the left-hand side of the screen.  
*Result: The Staffing Activity Query window opens.*  
*Note: A Staffing Activity Query for a particular event can be generated by clicking the **Staffing Activity for Event** button from the **Staffing** tab in Event Manager.*
3. Set a date range for your query by choosing the option **Less Than Or Equal To**, **Greater Than Or Equal To**, **Within Date Range**, or **Relative Date Range**.

4. [Optional] Choose to exclude cancelled events by clicking the **Exclude Cancelled Events** checkbox.
5. [Optional] Choose to display separate records for compensation details by clicking the **Show Separate Records for Compensation Details** checkbox.
6. Click **OK** to generate the query.

Event #	Date	Client/Organization	Employee	Start	End	Position	Hours	Wage	Cost
E00111	4/5/2013	Crow Wedding Reception	Amy Hazelby	04:00 PM	10:00 PM	Waiter/Waitress	6	\$7.00	\$42.00
E00381	4/10/2013	F.G.C.U.	Amy Hazelby	04:00 PM	10:00 PM	Waiter/Waitress	6	\$7.00	\$42.00
E00111	4/5/2013	Crow Wedding Reception	Brian Shaw	04:00 PM	10:00 PM	Waiter/Waitress	6	\$7.00	\$42.00
E00452	3/24/2013	American Family Insurance	Carolyn Bakerton	10:00 AM	03:30 PM	Waiter/Waitress	5.5	\$7.00	\$38.50
E00111	4/5/2013	Crow Wedding Reception	Cheryl Napoli	04:00 PM	10:00 PM	Waiter/Waitress	6	\$7.00	\$42.00
E00323	4/4/2013	P S S	Cheryl Napoli	10:00 AM	06:00 PM	Waiter/Waitress	8	\$7.00	\$56.00
E00111	4/5/2013	Crow Wedding Reception	Chris Kipplinger	04:00 PM	10:00 PM	Waiter/Waitress	6	\$7.00	\$42.00
E00381	4/10/2013	F.G.C.U.	Chris Kipplinger	04:00 PM	10:00 PM	Waiter/Waitress	6	\$7.00	\$42.00
E00445	4/2/2013	N A C M	Chris Kipplinger	10:30 AM	03:30 PM	Waiter/Waitress	5	\$7.00	\$35.00
E00445	4/2/2013	N A C M	Chrissy Snow	10:30 AM	03:30 PM	Host/Hostess	5	\$5.00	\$25.00
E00111	4/5/2013	Crow Wedding Reception	Cindy Snow	04:00 PM	10:00 PM	Waiter/Waitress	6	\$7.00	\$42.00
E00111	4/5/2013	Crow Wedding Reception	Eric Myers	04:00 PM	10:00 PM	Waiter/Waitress	6	\$7.00	\$42.00
E00344	3/25/2013	Diebold Company	Eric Myers	06:00 AM	01:00 AM	Waiter/Waitress	19	\$7.00	\$133.00
E00371	4/13/2013	Dvorak Reception	Eric Myers	04:30 PM	12:00 AM	Waiter/Waitress	7.5	\$7.00	\$52.50
E00027	3/9/2013	Glessing Wedding	Eric Myers	12:00 PM	01:00 AM	Waiter/Waitress	13	\$7.00	\$91.00
E00355	2/19/2013	GME Consultants	Eric Myers	06:30 AM	01:00 AM	Waiter/Waitress	5.5	\$7.00	\$38.50
E00186	3/30/2013	Goetz/Lyons Wedding Rec	Eric Myers	04:00 AM	01:00 AM	Waiter/Waitress	21	\$7.00	\$147.00
E00374	2/22/2013	Greg's Soccer Team	Eric Myers	06:30 AM	03:00 AM	Waiter/Waitress	3.5	\$7.00	\$24.50
E00381	4/10/2013	F.G.C.U.	Eric Myers	04:00 PM	10:00 PM	Waiter/Waitress	6	\$7.00	\$42.00
E00323	4/4/2013	P S S	George Kipplinger	10:00 AM	06:00 PM	Bartender	8	\$10.00	\$80.00
E00111	4/5/2013	Crow Wedding Reception	George Roop	04:00 PM	10:00 PM	Bus Boy	6	\$5.00	\$30.00
E00445	4/2/2013	N A C M	George Roop	10:30 AM	03:30 PM	Bus Boy	5	\$5.00	\$25.00
E00111	4/5/2013	Crow Wedding Reception	George Schoenfeld	04:00 PM	10:00 PM	Waiter/Waitress	6	\$7.00	\$42.00
E00325	3/20/2013	Cruises & Vacations, Inc.	Greg Kipplinger	12:30 PM	04:30 PM	Waiter/Waitress	4	\$7.00	\$28.00
E00324	1/14/2013	Bass Inc.	Jack Mazzone	06:00 AM	11:00 PM	Bartender	7	\$10.00	\$70.00
E00379	4/4/2013	Gustave A. Larson Compan	Jack Mazzone	10:00 AM	01:00 PM	Bartender	3	\$10.00	\$30.00
E00374	2/22/2013	Greg's Soccer Team	Jack Mazzone	03:00 AM	11:00 PM	Bartender	4	\$10.00	\$40.00
Cnt: 103							652.75	6.98	4,576.63

**caterease**<sup>™</sup>  
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