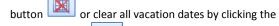
Establish Employee Vacation Days

- 1. From Employee Manager, click on the name of the employee whose vacation days you would like to set.
- 2. Click the **Tools** button at the top of your screen and select **Vacations**.
- 3. Click and hold the left mouse button down on the vacation start date, drag the mouse to the end date, then release the mouse button.



- Click the Set Selected Dates button and click either the Off All Day radio button or the <u>Between Times</u> radio button.
- 5. When finished, click **OK**.

Note: To clear vacation days, select the vacation dates you would like to change and click the **Clear Selected Dates**



Clear All button

| 🚳 Employee Vacation Days (Myers, Eric). – 📼 🗴 | | | | | | |
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| 🛛 💌 🔌 🛛 Notes | | | | | | |
| November, 2013 | December, 2013 | January, 2014 February, 2014 | • | | | |
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| *6 10 11 12 13 14 15 16 | 51 15 16 17 18 19 20 21 | Vacation Day Properties 15 | | | | |
| 47 17 18 19 20 21 22 23 | 52 22 23 24 25 26 27 28 | 22 | | | | |
| *8 24 25 26 27 28 29 30 | 1 29 30 31 | Off All Day | | | | |
| No. 4 2014 | 1-1-0044 | ○ Between Times From 12:00 AM ↓ | | | | |
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Add Event Staffing

1. From a Sub-Event in Event Manager, click the **Staffing** tab, located at the bottom of the screen.

2. Click the Select Staff button

- 3. Click on the Shift name on the left-hand side of the window to select the shift/position, then select the corresponding staff member from the right-hand side of the window.
- 4. Click **OK**.

See Managing Staff for an Event.

View Staffing in the Scheduler

- 1. Click the **Scheduler** button from the **Main** sidebar.
- Click the **Display** button, located at the top of the screen.
 Select **Staffing**.

| Contraction Contraction | Reports Display Administ | ration Help | | | | | | | |
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Additional Resources

Employee Manager User Guide Generating the Employee Staffing Report Creating Email Address Books Using Merge Tables to Insert Staffing Reviewing and Managing Event Costing

catering & event management software

a product of Horizon Business Services, Inc. Naples, FL 34102 T: 239.261.6617 F: 239.261.0067 www.caterease.com help@caterease.com



Quick Reference Guide:

Employee Manager



800.863.1616 www.caterease.com

Create a Position Shift

- 1. Click the **Employee Manager** button from the **Main** sidebar.
- 2. Click the **Tools** button and select **Shifts Setup**.
- 3. Click the **Add Position** button **I**, located at the top lefthand side of the window.
- 4. Type the name of the position into the Position field.
- 5. Optionally complete the <u>Uniform</u> and <u>Agency</u> fields.
- Optionally enter an Estimated Cost (Wage) into the <u>Est Cost</u> field.
- 7. Click into the <u>Price</u> field and type a default price (per hour) for the shift.
- Optionally click into the <u>Flat</u> checkbox to designate the shift as a flat rate.
- Note: Flat rate is used as an alternative to hourly rate.
- 9. Optionally select the <u>Default Shift Times</u> by clicking the down arrow to the right of each field.
- 10. Optionally type any desired notes into the <u>Notes</u> text block.
- 11. Click the **Save** button , located at the top of the window.
- 12. Click \mbox{Close} to close the window.

See Creating Default Shifts or Positions

Establish Shift Rules

- 1. From Employee Manager, click Tools and select Shifts Setup.
- 2. Click on a position in the grid at the bottom of the window.
- Click the Add Rule button limit, located on the right-hand side of the Shift Wizard Setup window, in the Wizard Rules section.
- 4. Click the down arrow in the field beneath "Create a New Wizard Rule that applies to..." and select the desired option.
- 5. In the "Rule for..." section, type the number of guests to add for every shift.
- 6. Optionally round the shift count up by clicking the <u>Round shift</u> <u>count up</u> checkbox.
- 7. Optionally type a shift rule comment into the <u>Comments</u> text block.
- 8. Click **OK** to close the Shift Wizard Rules window.
- 9. Click the **Save** button, located on the Shift Wizard Setup window.
- 10. Click **Close** to close the window.

See <u>Creating Default Shifts or Positions</u> (Establishing Shift Rules)

Add Employees

- 1. From Employee Manager, click the **Add Record** button located at the top of the screen.
- 2. Click **Yes** at the confirmation message.
- 3. Type the employee's last name into the <u>Last</u> field and press [Enter].
- 4. Fill out the remaining **General** tab fields by typing directly into the field or selecting the quick-pick item from the drop-down list.
- Click the Address tab and complete the Home and Mailing Address fields.
- 6. When finished, click the **Save** button

Add Employee-Related Files

- Click the Employee Related Files button ight-hand side of the Employee Manager window.
- Click the Add File button Link located on the right-hand side of the window.
- 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.

- 4. Click Yes.
- 5. Browse your way to the file you want to associate with this employee and select it.
- 6. Click **Open**.
- 7. Optionally enter a <u>Comment</u> to describe the file or its relationship to the employee.

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Assign a Position to the Employee

- 1. Click the **Positions** tab, located at the bottom of the Employee Manager screen.
 - on
- 2. Click the Select Positions for Employee button located on the right-hand side of the screen.
- 3. Highlight one or more positions and then click the **Select** button.
- 4. Click the X at the right-hand side of the Select Position window to close the window.
- 5. Populate any additional information, such as Uniform and Wage information, as desired.
- 6. Click the **Save** button

Set an Employee Work Schedule

- 1. From Employee Manager, click the **Tools** button and select **Work Times**.
- 2. Select an employee.
- Click into a Weekdays checkbox and select either the <u>All</u> <u>Day</u> or <u>Within Times</u> radio button. Note: If <u>Within Times</u> is selected, type a <u>From</u> and a <u>To</u> time(s).
- 4. Continue establishing days/times the employee is unable to work, as described above.
- 5. Click OK.

| Enter Weekdays And Times Employee CANNOT Work | | | | | | | |
|---|-----------|----------------|-------------|------------|------------|----------------|--|
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