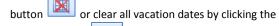
Establish Employee Vacation Days

- 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). – 📼 🗴						
🛛 💌 🔌 🛛 Notes						
 November, 2013 	December, 2013	January, 2014 February, 2014	•			
SMTWTFS	SMTWTFS	SMTWTES SMTWTES				
44 27 28 29 30 31 1 2	** 1 2 3 4 5 6 7	Save Vacation Days X 1				
45 3 4 5 6 7 8 9	³⁰ 8 9 10 11 12 13 14					
*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 ↓				
March, 2014 SMTWTFS	April, 2014 SMTWTFS	To 12:00 AM 🗘 🕓	_			
9 1	SMTWTFS 12345	To 12:00 AM - S	:			
10 2 3 4 5 6 7 8	1 2 3 4 5					
10 2 3 4 3 6 7 8	15 13 14 15 16 17 18 19	Vacation Day Notes 14				
12 16 17 18 19 20 21 22	17 20 21 22 23 24 25 26	Christmas Holidays 28				
13 23 24 25 26 27 28 29	18 27 28 29 30	construction days				
14 30 31	1					
July, 2014	August, 2014					
SMTWTFS	SMTWTFS	S				
27 1 2 3 4 5	31 1 2	4				
28 6 7 8 9 10 11 12	32 3 4 5 6 7 8 9	11				
²⁹ 13 14 15 16 17 18 19	³³ 10 11 12 13 14 15 16	OK Cancel 18				
30 20 21 22 23 24 25 26	34 17 18 19 20 21 22 23		i			
31 27 28 29 30 31	35 24 25 26 27 28 29 30	** 28 29 30 ** 26 27 28 29 30 31 1				
	36 31	45 2 3 4 5 6 7 8	:			

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**.

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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.
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- 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							
			Time Ranges				
Weekdays	Cannot W	ork.	From	<u>To</u>	From	<u>To</u>	
Monday	All Day	O Within Times	÷	÷	÷	÷	
Tuesday	🔘 All Day	Within Times	08:00 AM 💲	10:00 AM 💲	÷	\$	
Wednesday	🔘 All Day	Within Times	08:00 AM 💲	10:00 AM 💲	\$	\$	
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