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 **Employee 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.

4. Click the **Set Selected Dates** button and click either the Off All Day radio button or the Between Times radio button. (If choosing Between Times, enter the From and To times.)
5. When finished, click **OK**.
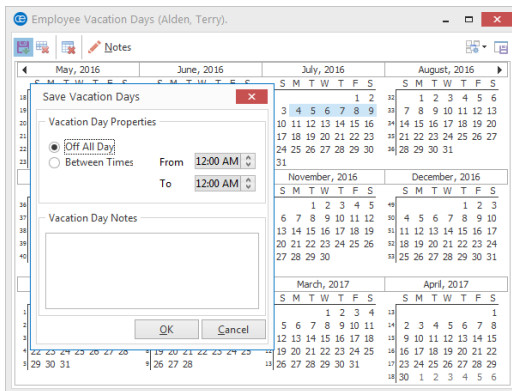   **Note**: To clear vacation days, select the vacation dates you would like to change and click the **Clear Selected Dates** button or clear all vacation dates by clicking the **Clear All Calendar Vacation Days** button .

*See Establishing Employee Vacation Days*

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.
2. Click the **Display** button, located at the top of the screen.
3. Select **Staffing**.
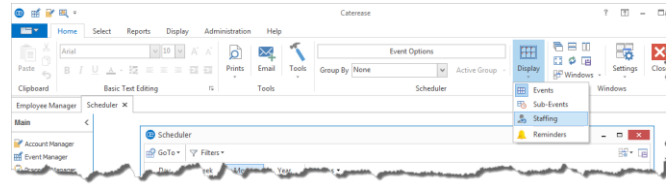
Additional Resources

Viewing Employees by Position
Viewing the Employee Scheduled Events Grid
Adding Additional Employee Compensation
Making an Employee Inactive
Managing Multiple Shifts

Quick Reference Guide:
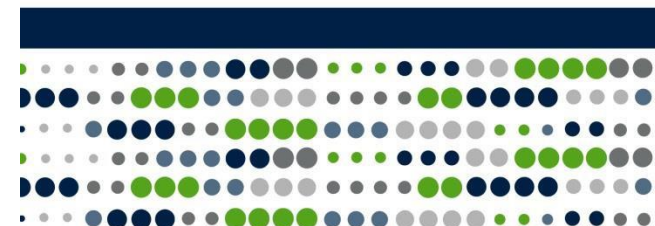
Employee Manager

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Create a Position Shift

1. Click the **Employee Manager** button from the **Main** sidebar.
2. Click the **Tools** button and select **Shift Setup**.
3. Click the **Add Position** button ⊕, located at the top left-hand side of the window.
4. Click **Yes** at the confirmation prompt.
5. Type the name of the position into the Position field.
6. Optionally complete the Uniform and Agency fields.
7. Optionally enter an Estimated Cost (Wage) into the Est Cost field.
8. Click into the Price field and type a default price (per hour) for the shift.
9. Optionally click into the Flat Rate checkbox to designate the shift as a flat rate.
   Note: Flat rate is used as an alternative to hourly rate.
10. Optionally select the Default Shift Times by clicking the down arrow to the right of each field and selecting an option.
11. Optionally type any desired notes related to the Shift/Position into the Notes text block.
12. Click the **Save Changes** button 💾, located at the top of the window.
13. Click **Close** to close the window.

See [Creating Default Shifts or Positions](#)

Establish Shift Rules

1. From Employee Manager, click **Tools** and select **Shift Setup**.
2. Click on a position in the grid at the bottom of the window.
3. Click the **Add Rule** button ⊕, 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 Round shift count up checkbox.
7. Optionally type a shift rule comment into the Comments text block.
8. Click **OK** to close the Shift Wizard Rules window.
9. Click the **Save Changes** button 💾, located on the Shift Wizard Setup window.
10. Click **Close** to close the window.

See [Establishing Shift Rules](#)

Add Employees

1. From Employee Manager, click the **Add Record** button ⊕, located in the main toolbar at the top of the screen.
2. Click **Yes** at the confirmation message.
3. Type the employee's last name into the Last field, and press **[Enter] or [Tab]** to move to the next field.
4. Fill out the remaining **General** tab fields by typing directly into the field or selecting the quickpick item from the drop-down list.
5. Click the **Address** tab and complete the Home Address and Mailing Address fields.
6. When finished, click the **Save Changes** button 💾.

See [Creating a Default List of Employees](#)

Add Employee-Related Files

1. From Employee Manager, click the **Tools** button and choose **Related Files** 📂.
2. Click the **Add File** button ⊕, located on the right-hand side of the window.
3. 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, whereas 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 Comment to describe the file or its relationship to the employee.
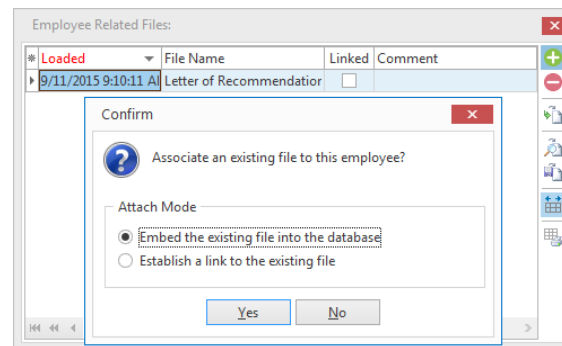

See [Adding Employee Related Files](#)

Assign a Position to the Employee

1. Click the **Positions** tab, located at the bottom of the Employee Manager screen.
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 additional information, such as Uniform and Wage information (if you did not set defaults).
6. Click the **Save Changes** button 💾.

See [Assigning a Position to an Employee](#)

Set an Employee Work Schedule

1. From Employee Manager, click on the name of an employee whose work times you would like to set.
2. Click the **Tools** button, located in the main toolbar at the top of the screen, and select **Work Times**.
3. Click into a Weekdays checkbox and select either the All Day or Within Times radio button.
   Note: If Within Times is selected, type a From and a To time(s).
4. Continue establishing days/times the employee is unable to work, as described in Steps 2 and 3.
5. Click **OK.**
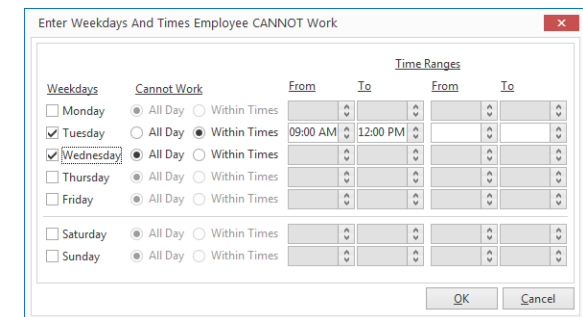
See [Setting an Employee Work Schedule That Varies from Week to Week](#)