caterease
catering + event planning solution

Training Guide

Managing Your Staff in Employee Manager

TABLE OF CONTENTS

TABLE OF CONTENTS

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, hosts/hostesses, delivery drivers, meat carvers, setup staff, etc., and then assign each position its own set price, uniform, or even default shift times.

1. Click the **Main** button from the Caterease sidebar area, located on the left-hand side of your screen.
2. Click the **Employee Manager** button.
3. Click the **Tools** button, located in the **Home** ribbon tab at the top of the Employee Manager window, and choose **Shift Setup** (or click the **Shift Setup** button, located in the toolbar at the bottom of your screen, depending on your personal configuration).
   Result: *The Shift Wizard Setup window opens.*
4. Click the **Add Position** button, located at the top left-hand side of the window.
   Result: *A confirmation prompt appears.*
5. Click **Yes** to confirm.
   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 window.
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: *The Employee Manager quickpicks listed here are set up in **Setup** > **Quickpicks > Employee Manager**. See "Creating Employee Manager Quick-pick Lists" for information about adding quickpicks to Shifts and Staffing.*

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, or click the down arrow to the right of the field to access the calculator tool.

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 list.
    Note: *The **Default Shift Times** are set to the Start and End times associated with the sub-event.*

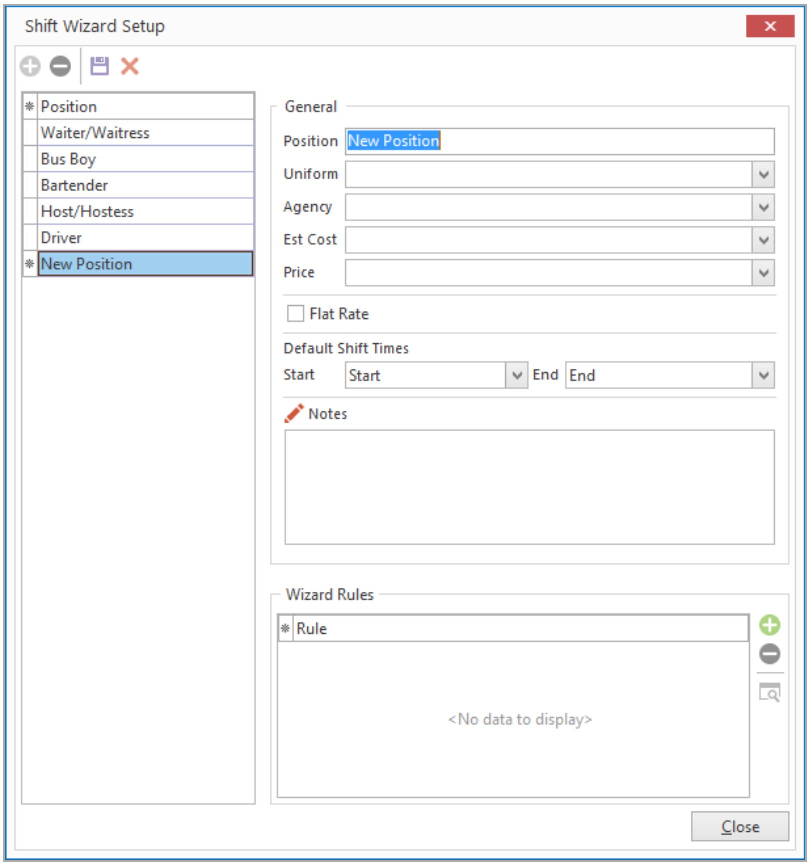
Tip: *For more information about Est Cost, Price, and Flat Rate fields, see the section entitled "Customizing the Staffing Grid."*

14. **[Optional]** Click into the **Notes** text block and type relevant position notes as desired.

15. **[Optional]** Establish any desired shift rules. (See the next topic, "Establishing Shift Rules.")

16. Click the **Save** button , located at the top left-hand side of the window.
    Result: *The Position is saved.*

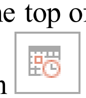
17. Click **Close** to close the window.



Establishing Shift Rules

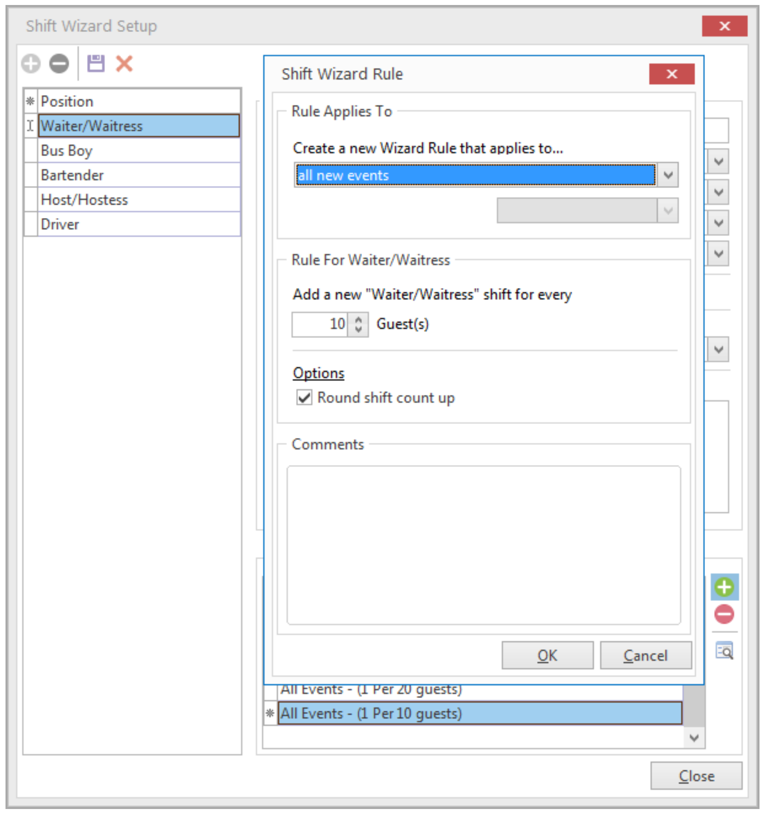
Once you've created your shift position, you can apply various rules to the shift. Maybe you want to establish a rule that, whenever you book a wedding, you need to assign one wait-staff for every ten guests. Choose to add a new shift based on a set number of guests, then apply your shift rule to a certain 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. (Available in Standard and Professional versions of Caterease.)

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 in the main toolbar at the top of your screen, and choose **Shift Setup** (or click the **Shift Setup** button  at the bottom of your screen, depending on your personal configuration).
   Result: *The Shift Wizard Setup window opens.*

4. Click on a position in the **Position** grid, in the left-hand pane, (or add a position, as described previously).

5. 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.*



6. Click the down arrow in the first field beneath **Create a new Wizard Rule that applies to**…

   - all new events (Select this option to apply the shift rule to all events.)
   - events with a theme of
   - events with a category of

7. 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."*

8. 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.

9. **[Optional]** Click into the checkbox under **Options** to round the shift count up, if needed.

10. **[Optional]** Click into the **Comments** text block and type any desired shift rule comments.

11. Click **OK** to close the Shift Wizard Rule window.

12. Click the **Save** button , located at the top of the Shift Wizard Setup window.
    Result: *The Shift and Shift Rules are saved.*

13. Click **Close** at the bottom of the Shift Wizard Setup window.

Creating Employee Manager Quickpick Lists

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

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 (arrow) to the left of **Event Manager** to expand the selection.

3. Click the expand button (arrow) to the left of **Sub-Event**.

   Note: *Click the* ***Full Expand*** *button to expand all categories.*

4. Click the expand button (arrow) to the left of **Shifts.**

5. Click **Category**.

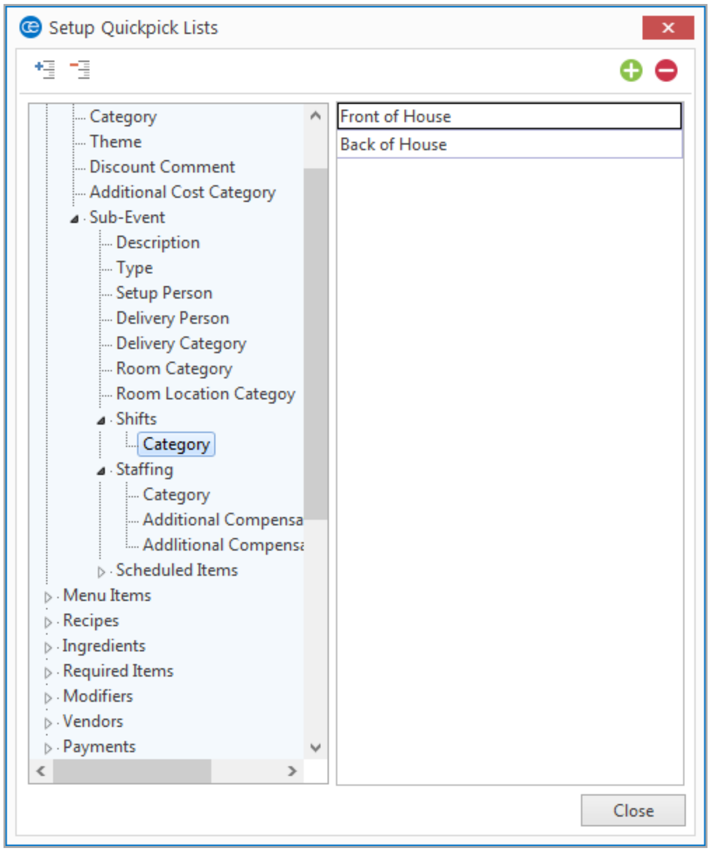
6. Click the **Add New Item** button .
   Result: *A blank line is added.*

7. Type the desired quickpick item into the blank field.

8. Click the expand field to the left of **Staffing**.

9. Follow steps 6-7 to add quickpick items to the Category, Additional Compensation Description, and Additional Compensation Category fields.

10. When finished, click **Close**.



Note: *The Employee Manager Position-related quickpicks are set up in* ***Setup*** *>* ***Quick-picks > Employee Manager****.*

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 listing standard contact information, you can also include such details as which positions each employee works, his or her wage, and you can even associate optional external computer files that relate to the employee.

Objectives:

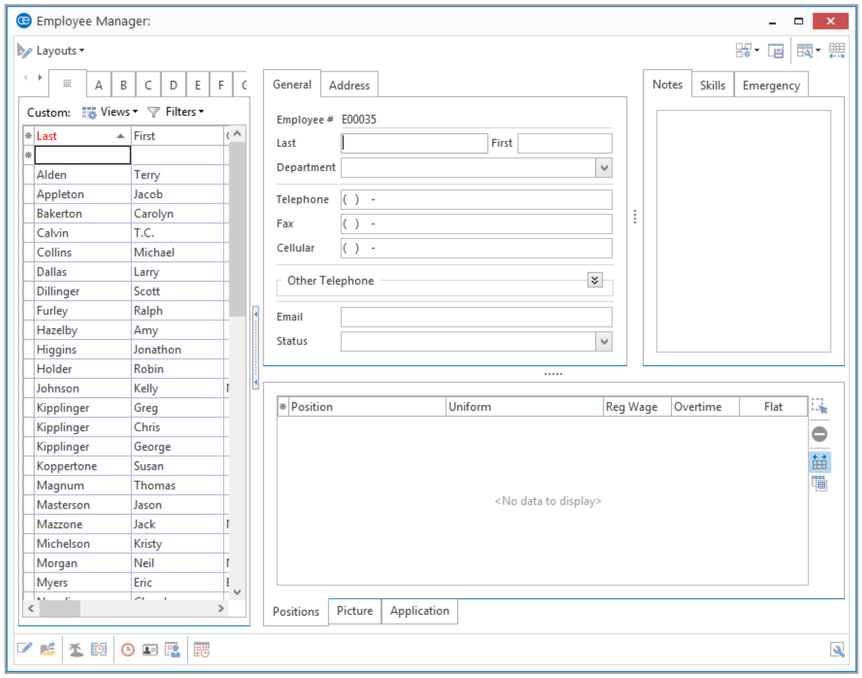
Upon completing this unit, you will be able to:

- *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 day-of-week 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 in the main toolbar 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 positioned in the Last field.*
   Note: *The Employee #, located above the Last field, is auto-assigned by*

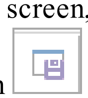
Caterease.



5. Type the employee's last name into the <u>Last</u> field.

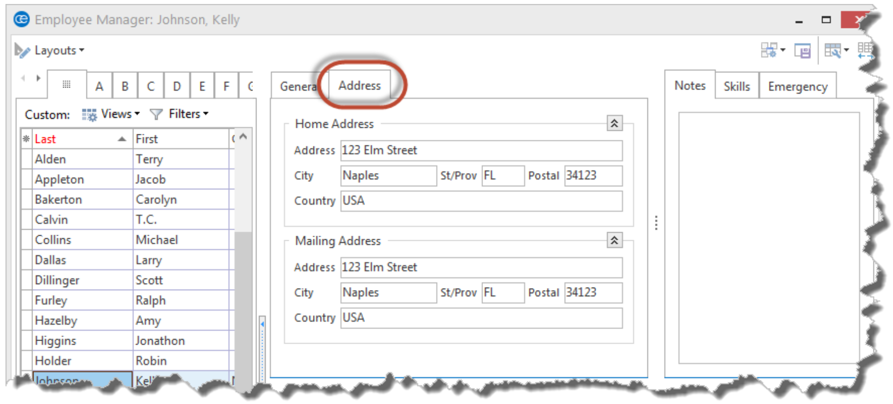
6. Press **[Enter]**or **[Tab]** to move to the next field.

7. Fill out the remaining **General** tab fields by typing directly into the field or by selecting items from the corresponding drop-down lists (if quickpick items have been added).
   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 default 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 <u>Address</u> 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 <u>Address</u> field and type the employee's mailing address (if different from the Home Address; the Mailing Address auto-populates based on the information entered in the **Home Address** fields).

6. Continue to complete the mailing address information by typing into each field and pressing **[Enter]** or **[Tab]** to move to the next field.

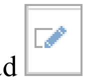
Adding Additional Employee Information

1. **[Optional]** Click the **Notes** tab, located at the top right-hand side of your 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.

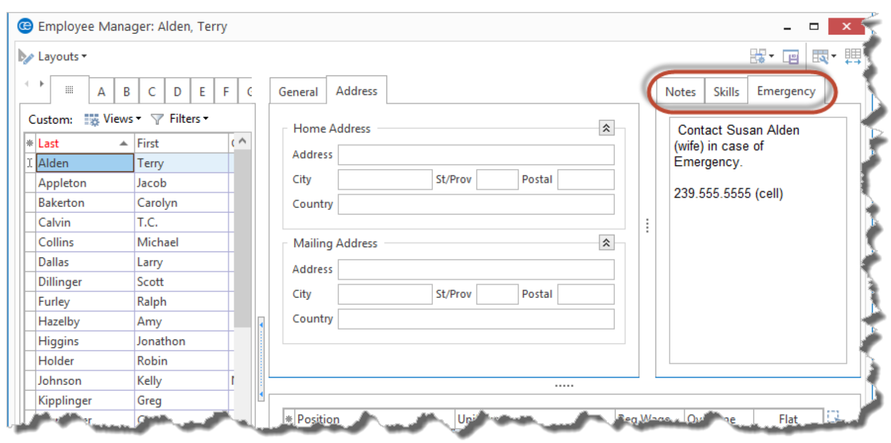
Tip: *Add text to your Scratch Pad from the **Administration** ribbon tab > **Lists** > **Scratch Pad**.*

4. Click into the white text block and type employee skills information, or use the Scratch Pad  to insert pre-typed 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 your screen.*

5. **[Optional]** Click the **Emergency** tab, located at the top of the screen, then 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 and select a stored employee picture.

7. **[Optional**] To attach the employee's supporting documents, such as a scanned image of a driver's license, 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 and select a stored image.
   Note: You can also use the Related Files area to store supporting documents, such as a resume or letter of recommendation. For more information, see the section on adding employee-related files.

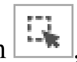


Assigning a Position to an Employee

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 your screen.

2. Click the **Select Positions for Employee** button , located on the right-hand side of your 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 to close the 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. Refer to Unit 1.*

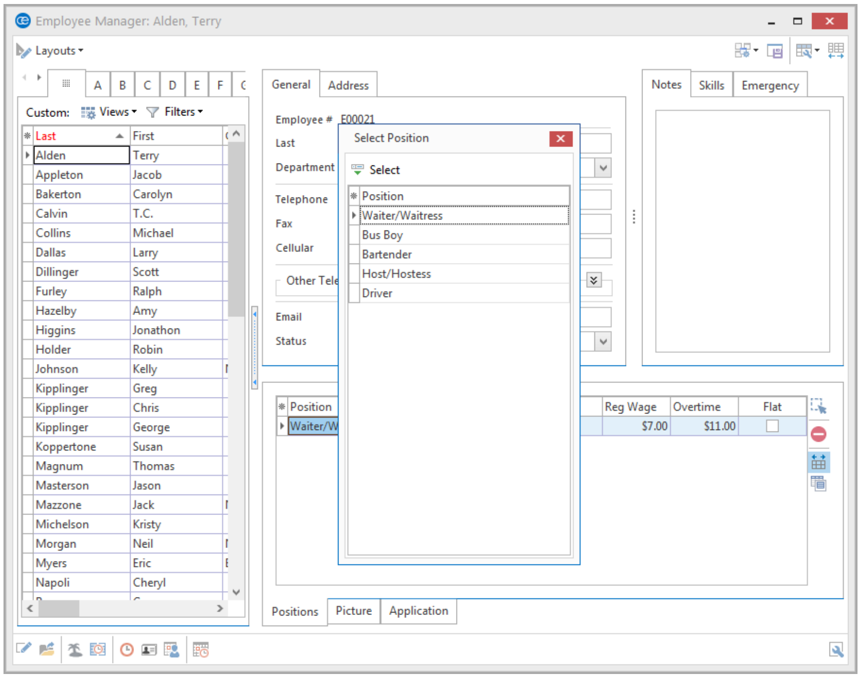
6. Press **[Tab]** or **[Enter]** to move to the next field.

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 the right of the field to access the drop-down calculator.*

9. If the wage is a flat rate, click into the Flat field to place a check mark.

10. When finished adding position information, save your changes by clicking the **Save** button , located at the top of your screen.



Adding Employee Related Files

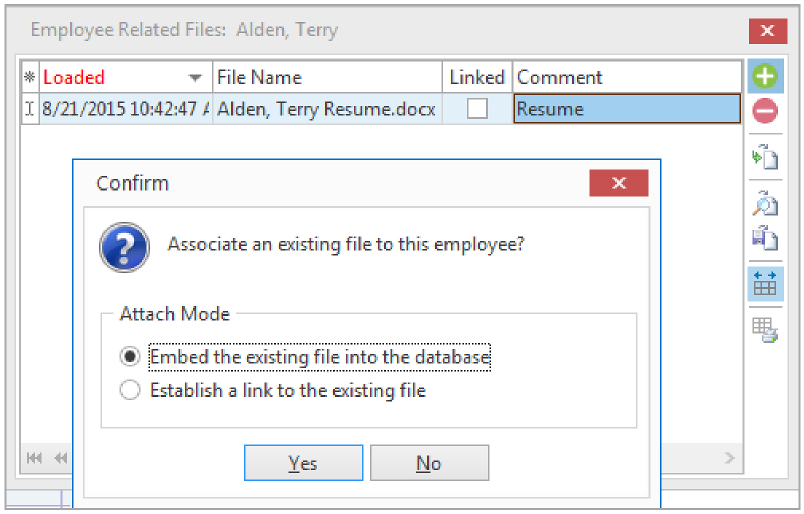
If you have any computer files (Word documents, Excel spreadsheets, PDF files, etc.), that are somehow related to an employee, you can associate those files to the employee in the Employee Manager module. You can choose to embed a copy of each file into the Caterease database or, if you plan to make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

Adding Employee Related Files

1. From the main Employee Manager screen, select an employee from the grid by clicking on the employee's name.

2. Click the **Tools** button, located in the **Home** ribbon tab at the top of your screen, and choose the **Related Files** button .
   Result: *The Employee Related Files window opens.*
   Note: *This button may also be accessed from the toolbar at the bottom of your screen, depending on your personal configuration.*

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 employee.

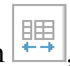
9. When finished, click the X at the upper right-hand side of the Employee Related Files window.

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 designate 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

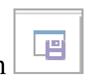
1. Click the **Employee Manager** button, located in the **Main** sidebar group on the left-hand side of your screen.

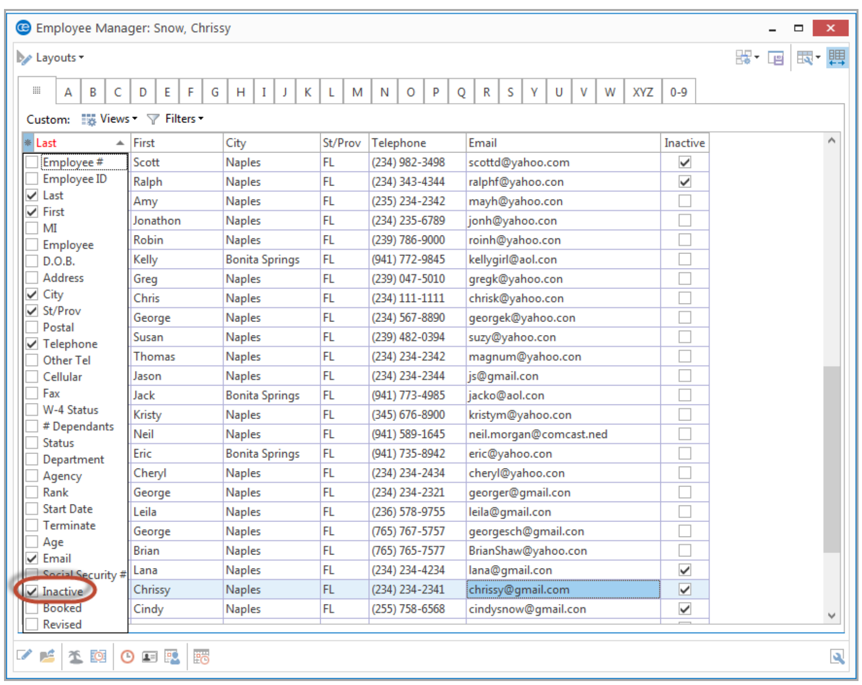
2. Click the **Display Full Grid** button , located at the top right-hand side of your screen.
   Result: *The Employee Manager is displayed as a full grid, enabling you to customize your options.*

3. Click the **Quick Column Customizing** button , located on the upper left-hand side of your screen, to the left of the Last field.
   Result: *A drop-down list of available columns displays.*

4. Click into the Inactive checkbox.
   Result: *A check appears in the checkbox, and the Inactive column displays in the grid.*

5. Select the employee you would like to make inactive, 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.*

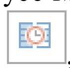
6. Click the **Save Current Window Settings** button  if you would like the new layout (reflecting the **Inactive** column) to serve as your default.

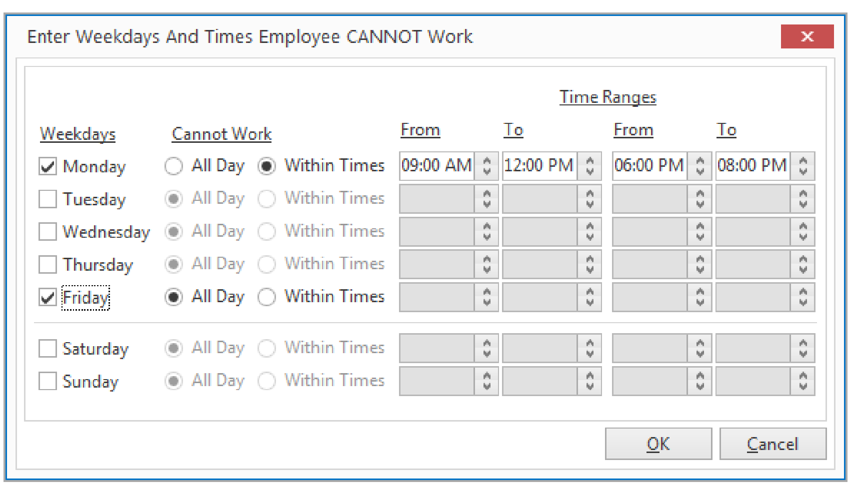


Setting a Defined Employee Work Schedule

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

1. From your Employee Manager main screen, click on the name of the employee whose availability you would like to set.
2. From the **Tools** button, located in the **Home** ribbon tab at the top of your Employee Manager screen, select **Work Times,** or click the **Work Times** button , located at the bottom of the screen, depending upon your personal configuration.
   Result: *The Enter Weekdays And Times Employee CANNOT Work window opens.*
3. Click into a **Weekdays** checkbox.
4. Click either the **All Day** or **Within Times** radio button.
   Note: *Selecting **Within Times** will enable access to the Time Ranges <u>From</u> and <u>To</u> fields.*
5. If **Within Times** is selected, type a **From** and a **To** time.
   Note: *You are able to set two time ranges per day.*
6. Continue establishing days/times the employee is unable to work, as described above.
7. When finished, click **OK** to close the window.



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. From your Employee Manager main screen, click on the name of the employee whose weekly availability you would like to set.

2. From the **Tools** button, located in the **Home** ribbon tab at the top of your Employee Manager screen, select **Employee Vacations,** or click the **Employee Vacations** button, located at the bottom of the screen, depending upon your personal configuration.
   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.

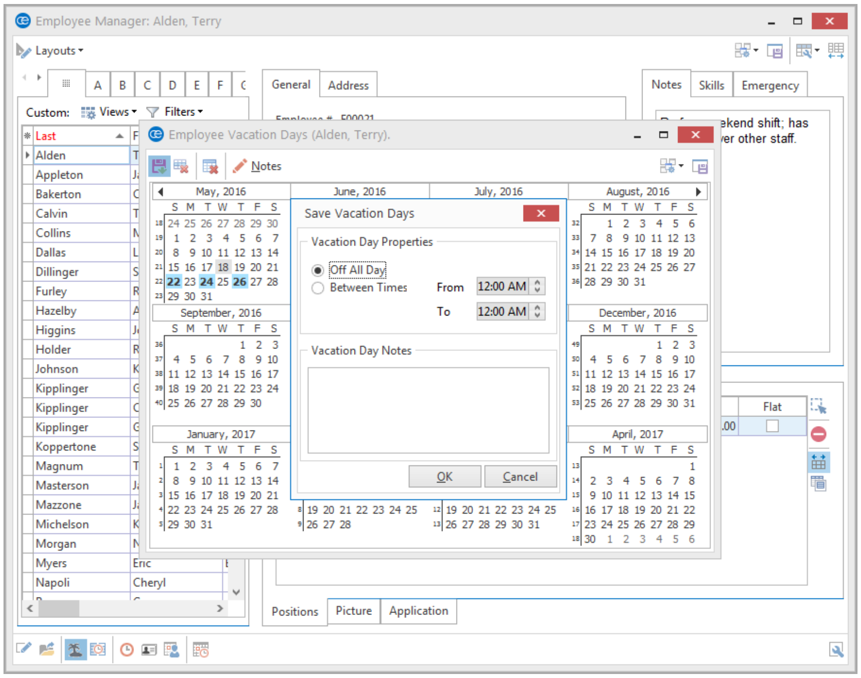
5. Click the **Set Selected Dates** button, located on the upper left-hand side of the window.
   Result: *The Save Vacation Days window opens.*

6. Click the **Off All Day** radio button or the **Between Times** radio button.
   Note: *If* ***Between Times*** *is selected, the <u>From</u> and <u>To</u> time fields are enabled.*

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

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

9. Click the **Close** button to close out of the Employee Vacation Days window.



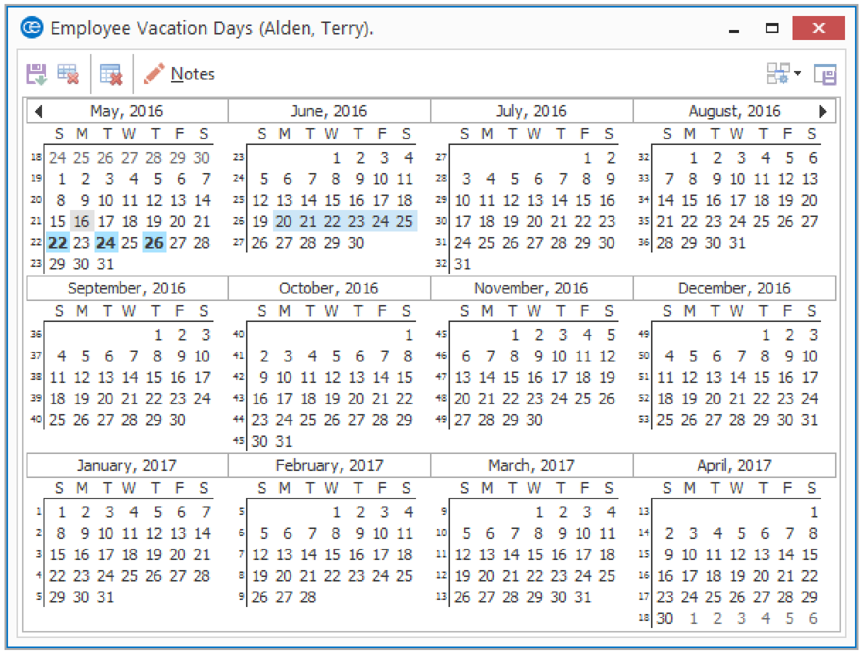
Establishing Employee Vacation Days

The Vacations section of Employee Manager 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 your Employee Manager main screen, click on the name of the employee whose vacation dates you would like to set.
2. Click the **Tools** button, located in the **Home** ribbon tab at the top of your Employee Manager screen, and select **Employee Vacations**, or click the **Employee Vacations** button  at the bottom of your screen, depending upon your personal configuration.

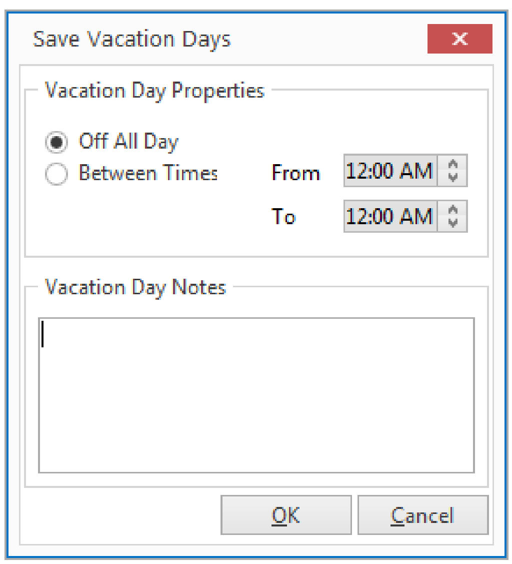
Result: *The Employee Vacation Days window opens.*



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



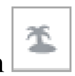
6. Click either the **Off All Day** radio button or the **Between Times** radio button.
   Note: *If* ***Between Times*** *is selected, the <u>From</u> and <u>To</u> time fields are enabled.*

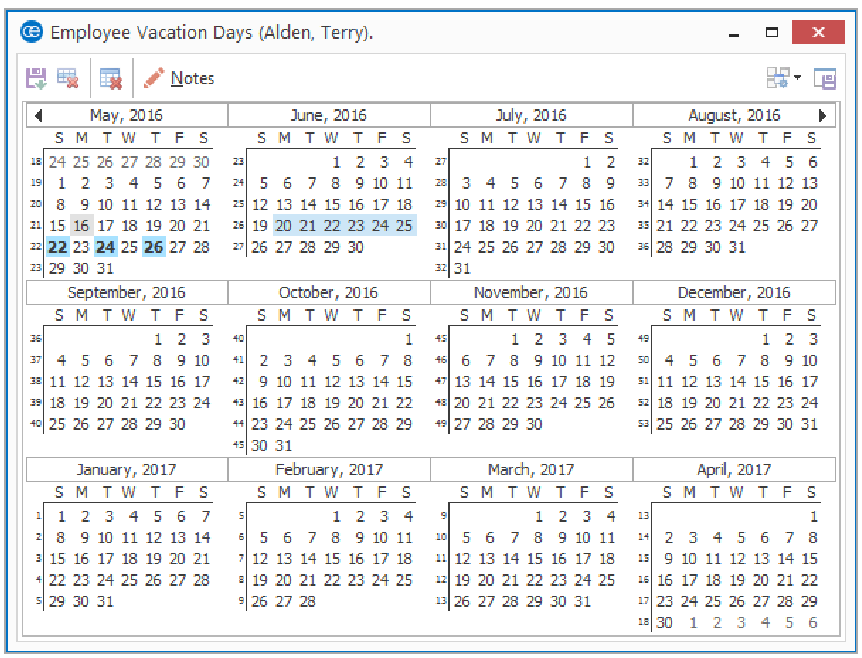
7. **[Optional]** Click into the **Vacation Day Notes** text block and type any relevant notes.

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

Clearing Selected Vacation Dates

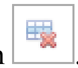
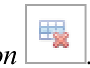
1. From your Employee Manager main screen, click on the name of the employee whose vacation dates you would like to clear (remove).

2. Click the **Tools** button, located in the **Home** ribbon tab at the top of your Employee Manager screen, and select **Employee Vacations**, or click the **Employee Vacations** button  at the bottom of your screen, depending upon your personal configuration.
   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.

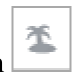
4. Drag the mouse to the vacation end date you would like to clear.

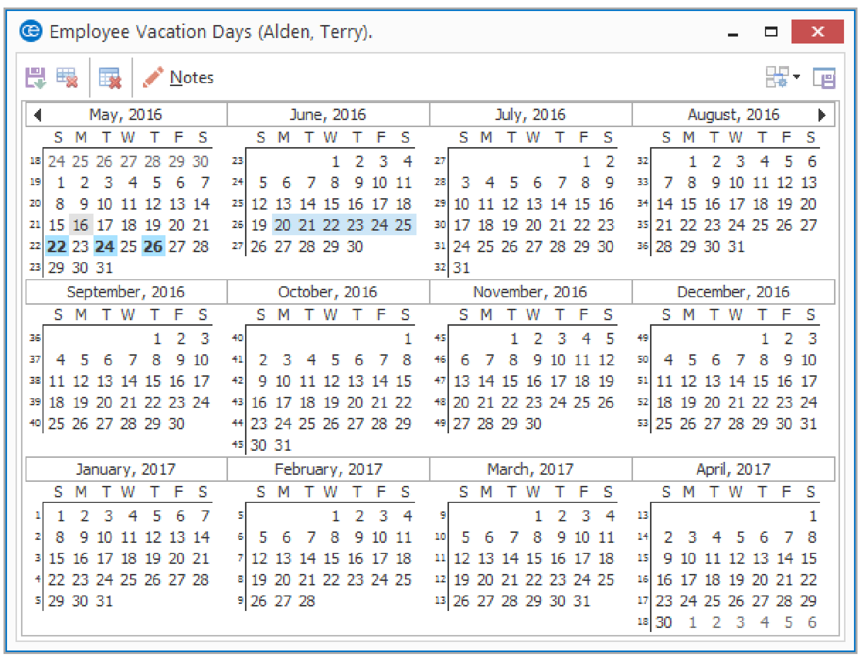
5. Click the **Clear Selected Dates** button .
   Note: *To remove only one vacation day, click on the desired day you would like to clear, and click the **Clear Selected Dates** button* .

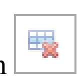
6. Click the **Close** button  at the top right-hand side of the screen to close the window.

Clearing All Vacation Dates

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

2. Click the **Tools** button, located in the **Home** ribbon tab at the top of your Employee Manager screen, and select **Employee Vacations**, or click the **Employee Vacations** button  at the bottom of your screen, depending upon your personal configuration.
   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.*

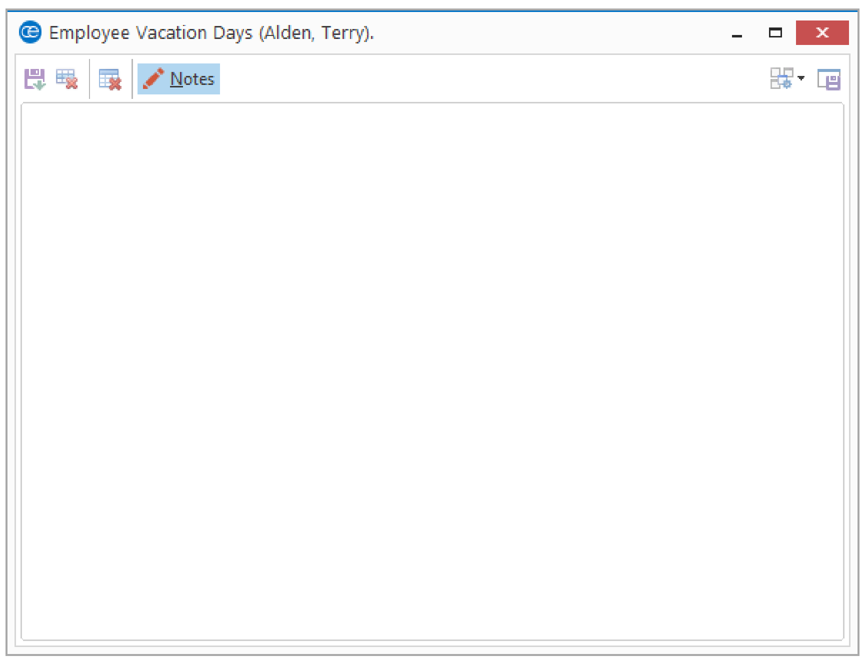
4. Click **Yes** to confirm your choice.

5. Click the **Close** button  at the top right-hand side of the screen to close the window.

Adding Vacation Notes

1. From your Employee Manager main screen, click on the name of the employee for whom you plan to add a note.

2. Click the **Tools** button, located in the **Home** ribbon tab at the top of your Employee Manager screen, and select **Employee Vacations**, or click the **Employee Vacations** button  at the bottom of your screen, depending upon your personal configuration.
   Result: *The Employee Vacation Days window opens.*



3. Click the **Notes** button.
   Result: *A text block opens.*

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 **Close** button  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 your Employee Manager main screen, click on the name of the employee whose scheduled events you would like to view.

2. From the **Tools** button, located in the **Home** ribbon tab at the top of your screen, select **Employee Schedule,** or click the **Employee Schedule** button , located at the bottom of your screen, depending on your personal configuration**.**
   Result: *The Employee Scheduled Events window opens.*

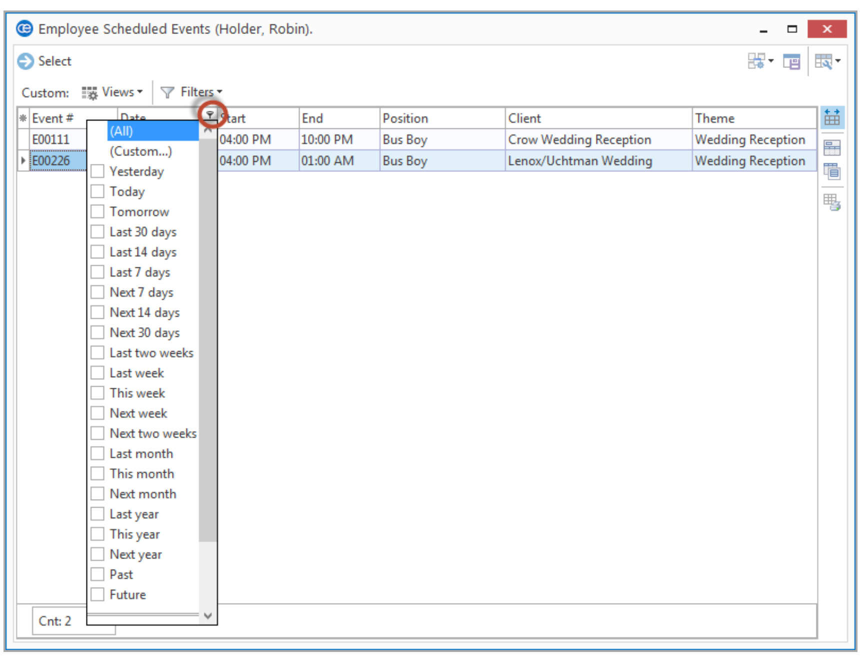
3. Place your mouse cursor on the Date column.
   Result: *A funnel icon becomes visible.*

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.*



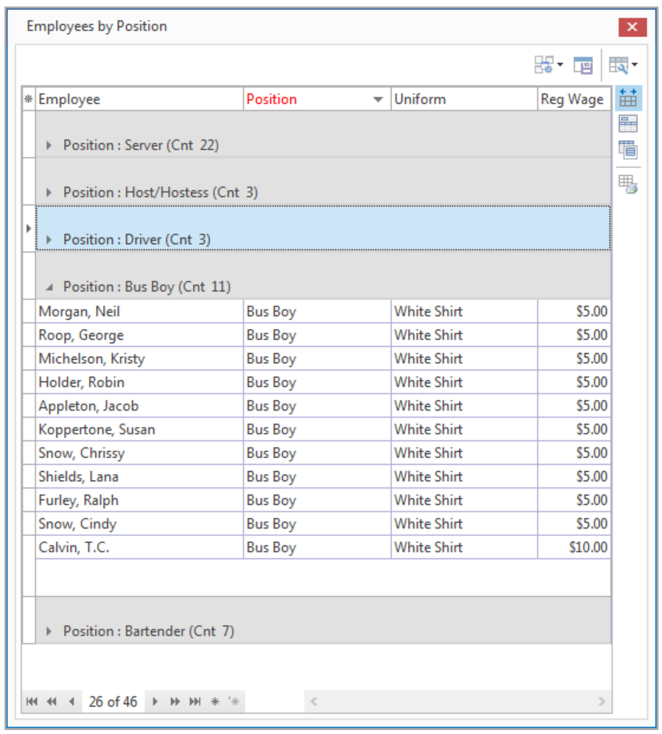
***Tip:** Click the **Select** button on a highlighted event to retrieve an event into Event Manager.*

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, located in the **Home** ribbon tab at the top of your Employee Manager main screen, select **Employees by Position,** or click the **Employees by Position** button at the bottom of your screen, depending on your personal configuration.
   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 expand button (arrow) to the left of a field to expand the selection.

4. **[Optional]** Display additional fields by accessing the **Quick Column Customizing** button and adding columns by clicking into the corresponding checkboxes.

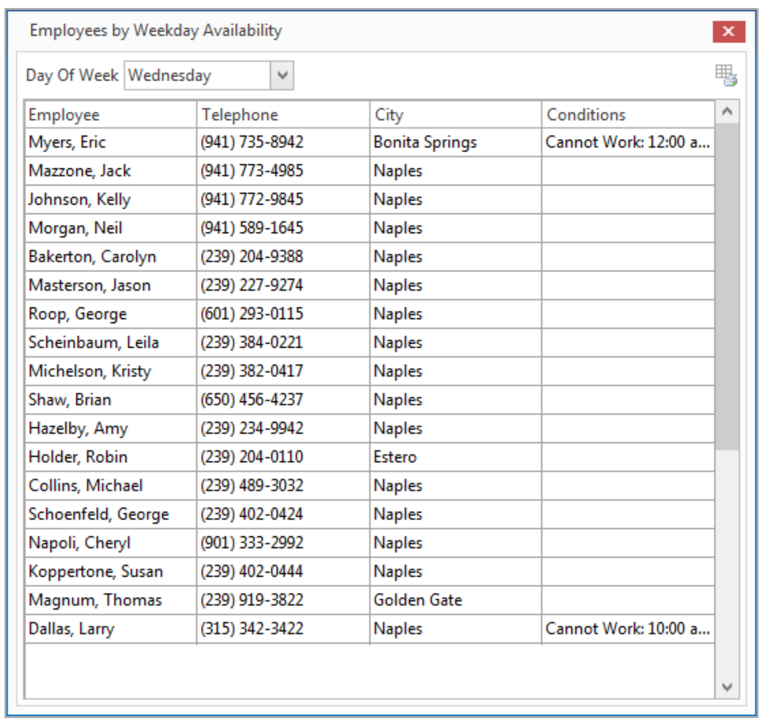
Note: *Remember to click the* ***Save Current Window Settings*** *button if you would like the new layout to serve as your default view.*

Viewing Employees by Day of the Week

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 Day of the Week (Weekday Availability)

1. From the **Tools** button, located in the **Home** ribbon tab at the top of your Employee Manager main screen, select **Employees by Weekday Availability** or, depending upon your personal configuration, click the **Employees by Weekday Availability** button at the bottom of your screen.
   Result: *The Employees by Weekday Availability window opens.*



Employee	Telephone	City	Conditions
Myers, Eric	(941) 735-8942	Bonita Springs	Cannot Work: 12:00 a...
Mazzone, Jack	(941) 773-4985	Naples	
Johnson, Kelly	(941) 772-9845	Naples	
Morgan, Neil	(941) 589-1645	Naples	
Bakerton, Carolyn	(239) 204-9388	Naples	
Masterson, Jason	(239) 227-9274	Naples	
Roop, George	(601) 293-0115	Naples	
Scheinbaum, Leila	(239) 384-0221	Naples	
Michelson, Kristy	(239) 382-0417	Naples	
Shaw, Brian	(650) 456-4237	Naples	
Hazelby, Amy	(239) 234-9942	Naples	
Holder, Robin	(239) 204-0110	Estero	
Collins, Michael	(239) 489-3032	Naples	
Schoenfeld, George	(239) 402-0424	Naples	
Napoli, Cheryl	(901) 333-2992	Naples	
Koppertone, Susan	(239) 402-0444	Naples	
Magnum, Thomas	(239) 919-3822	Golden Gate	
Dallas, Larry	(315) 342-3422	Naples	Cannot Work: 10:00 a...

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 **Close** button at the top right-hand side of the screen to close the window.

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:

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

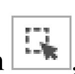
Adding Shifts to an Event

1. Open Event Manager by clicking the **Event Manager** button from the **Main** Caterease sidebar group, located on the left-hand side of your screen.

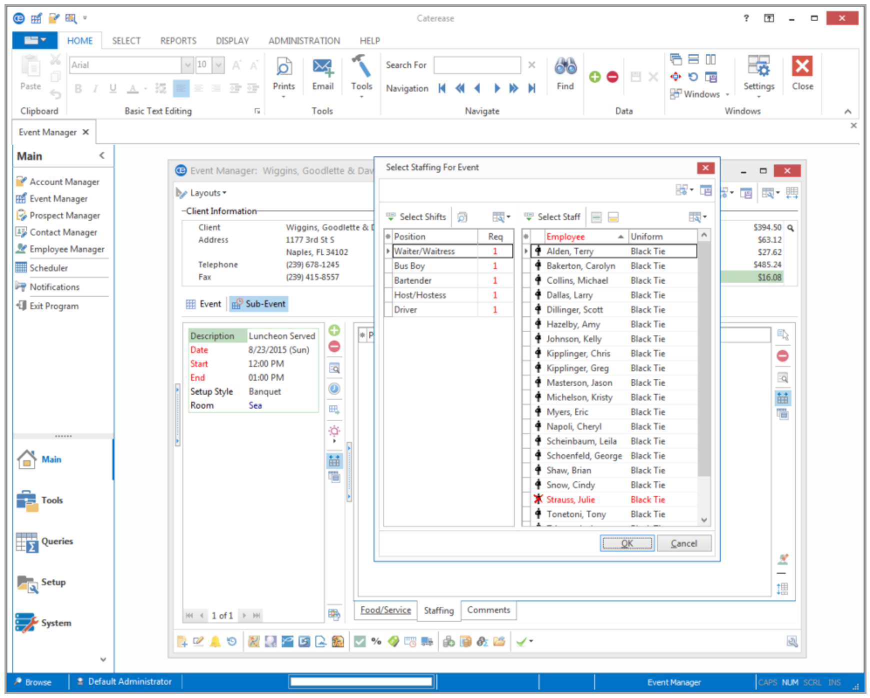
2. Select an event using the Event Manager search tools.
   Note: *Refer to the Booking Your First Event user manual for detailed information about searching for and selecting an event in Event Manager.*

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 , located 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. Refer to Unit 1.



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**.

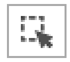
Selecting an Employee to Work an Event

1. Open Event Manager by clicking the **Event Manager** button from the **Main** Caterease sidebar group, located on the left-hand side of your screen.

2. Select an event using the Event Manager search tools.

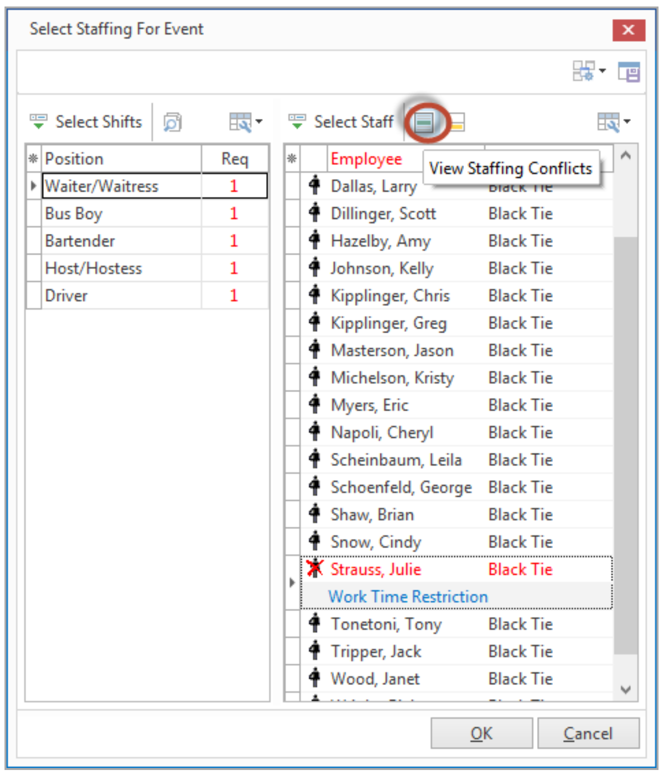
3. On the **Sub-Event** display, select a sub-event (if more than one) to which you will be adding staff.

4. Click the **Staffing** tab at the bottom of the screen.

5. Click the **Select Staff** button  , located 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**.

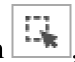
9. Edit any fields (time, wage, price, etc.), as desired.

10. Click **OK** to close the window or opt to allow selection of unavailable employees. (See next section.)

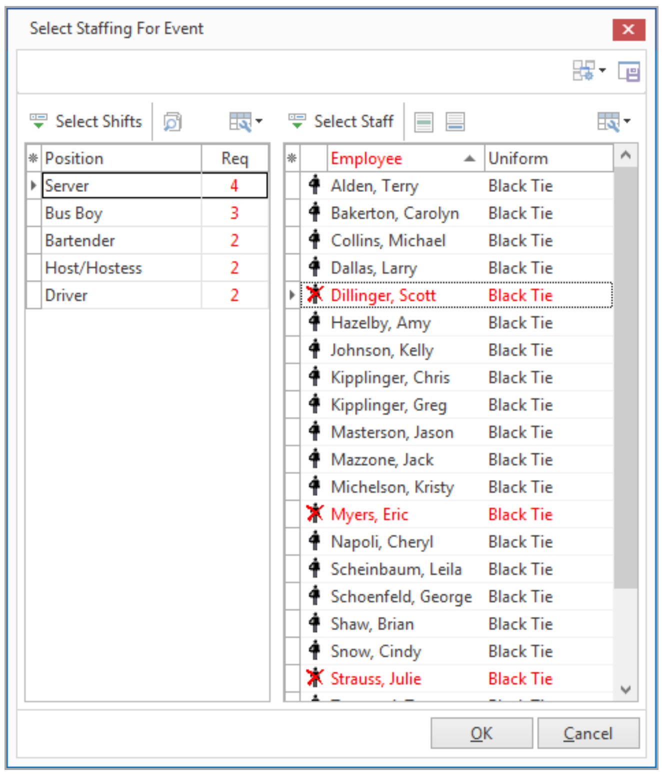
Selecting Unavailable Employees

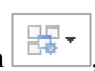
1. From the **Sub-Event** display in Event Manager, select a sub-event (if more than one) to which you will be adding staff.

2. Click the **Staffing** tab at the bottom of the screen.

3. Click the **Select Staff** button , located 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 or employees you would like to select. (Hold your **[Ctrl]** key down as you select more than one employee.)
   Note: *An unavailable employee's name appears in red text.*



5. Click the **Settings** button , located 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 or names of an unavailable employee to select him/her into an event.

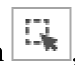
8. Click the **Select Staff** button.
   Note: *Alternatively, you may simply double-click the selection.*

9. Click **OK** to close the window.
   Result: *The employees you selected (in Step 4, above) will appear in the Staffing grid.*

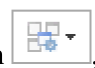
Confirming Employees to Work an Event

1. From the **Sub-Event** display in Event Manager, select a sub-event (if more than one) to which you will be adding staff.

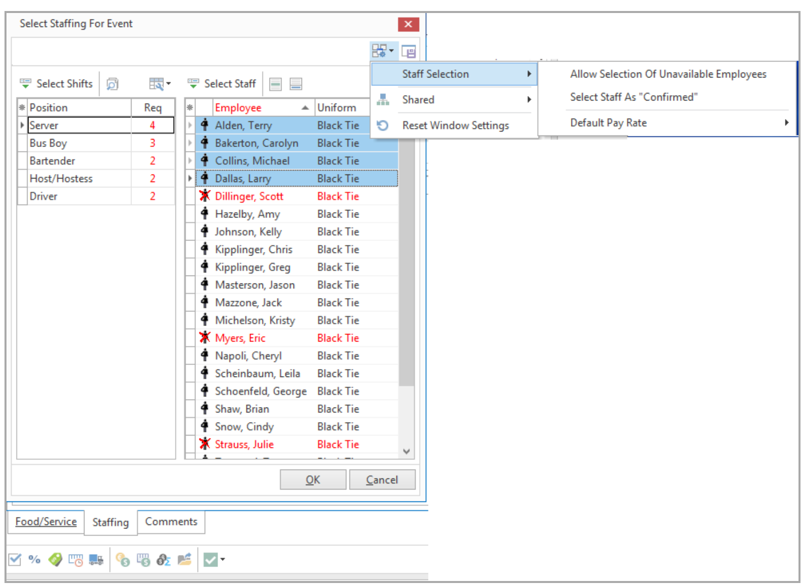
2. Click the **Staffing** tab at the bottom of the screen.

3. Click the **Select Staff** button , located at the top right-hand side of the Staffing screen.
   Result*: The Select Staffing For Event window opens.*

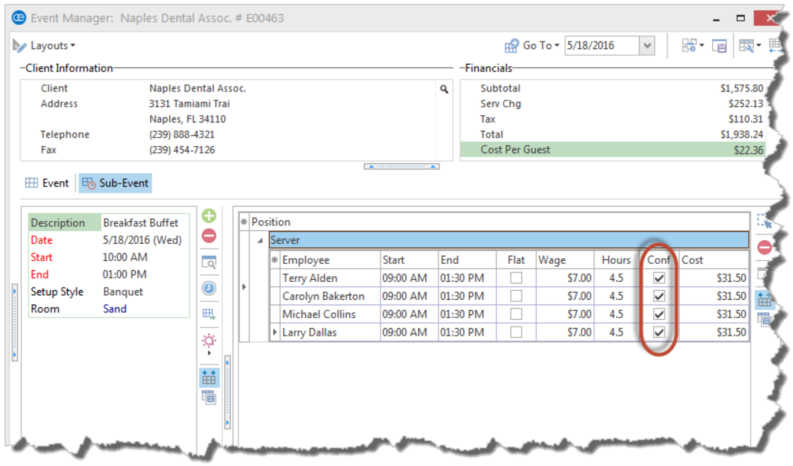
4. Click on the name of employee or employees who have confirmed they will work an event. (Hold your **[Ctrl]** key down as you select more than one employee.)

5. Click the **Settings** button , located at the top of the Select Staffing For Event window.

6. Select **Staff Selection** and choose **Select Staff as Confirmed**.



7. Click **OK.**
   Result: *The employees you selected (in Step 4, above) will appear in the grid and the* ***Conf*** *checkbox will have a check in it.*



Customizing the Staffing Grid

You can quickly and easily customize your Staffing screen in Event Manager by creating quickpick lists and customizing the Staffing and Employee grid. Fields can be added, removed or rearranged - and entire layouts can be changed so that different sections of information appear. Note: The Staffing tab in Event Manager shows a grid within a grid; the grid listing specific employees working events resides within a larger grid listing the scheduled shifts.

Customizing the Staffing Grid in Event Manager

1. From the grid located on the **Staffing** tab in Event Manager, click the **Quick Column Customizing** button , located to the left of the first column heading.
   Note: *There are two* ***Quick-Column Customizing*** *buttons available within the Staffing grid, as there are two grids available: one for shifts and another for employees.*

2. Click the checkbox to the left of any heading in the drop-down list to display that column on the grid. Items without checks will not be displayed in the grid.

3. Click the **Quick Column Customizing** button  again to close the drop-down list.

4. **[Optional]** Hold your left mouse button down on the heading of any column displayed in the grid, and drag and drop to the left or right to rearrange columns.

5. Remember to click the **Save Window Settings** button if you would like the new view to serve as your default setting.

Fields Available in the Position Grid on the Staffing Tab

Field	Description
Position*	Identifies the Position (Shift) associated with the employee (wait staff, bar-tender, etc.).
Start	Indicates the time this specific shift begins; can be set to default to any time associated with the event, and can be edited when necessary.
End	Indicates the time this specific shift ends; can be set to default to any time associated with the event, and can be edited when necessary.
Uniform	Indicates the type of uniform the shift requires; offers a custom quickpick list of choices.
Flat	Offers a checkbox to optionally establish any fee for this shift as a "flat" fee, meaning it will not be multiplied by number of hours or required employees.
Base Price	Indicates the base price (prior to any optional markup) for the shift.
Price Markup	Allows you to mark up the base price of the shift by a certain percentage to arrive at a price for this specific event.
Est Cost	Indicates an estimated cost (per hour) for the position. When you select the staff for a particular shift, the estimated cost for that particular event is ignored and the total cost of that shift is derived from the collective cost of the shift's staff. Estimated Cost is reflected by a strike-through line in Estimated Cost and Total Cost.
Price	Indicates the price of the shift for this particular event.
Hours	Adds the hours from the Start time of the shift to its End time.
Req*	Indicates the number of employees required to fill this shift for this event; automatically calculated based on rules you establish (and which can be edited).
Total Cost	Indicates the estimated total cost for the position. (See Est Cost, above.)
Total	Calculates the total due from the customer for this shift by multiplying the sums for Price, Hours, and the required number of employees.
Total Markup	Calculates the total amount the shift has been marked up by multiplying the Price Markup, times Hours, times the required number of employees.
Category	Allows you to categorize this shift for future tracking; offers custom quickpick list of options (e.g., "Back of House," "Front of House").
Comments	Offers a drop-down text box for you to enter specific comments pertaining to this shift.
	** Displayed in the Position grid by default.*

The Employee Grid (the grid within the Position grid) pertains to the **Employees** working an event.

Field	Description
Employee*	Identifies the name of the employee.
Start*	Indicates the time the employee will start working; defaults to the Start time of the shift, but can (and should) be edited when appropriate.
End*	Indicates the time the employee will end working; defaults to the End time of the shift, but can (and should) be edited when appropriate.
PosNum	Indicates an employee's position number. (This field is auto-assigned by Caterease.)
Uniform	Indicates the type of uniform the employee will wear for this particular shift.
Flat	Displays a checkbox, indicating whether the employee’s wage is a flat wage or hourly (hourly wages are multiplied times hours worked).
Wage	Indicates the hourly wage of the employee; defaults to the wage established in employee setup, but can be edited.
Hours	Adds the hours from the employee’s Start time to his End time.
Category	Allows you to categorize the employee for future reference; examples might include "Full Time" or "Part Time."

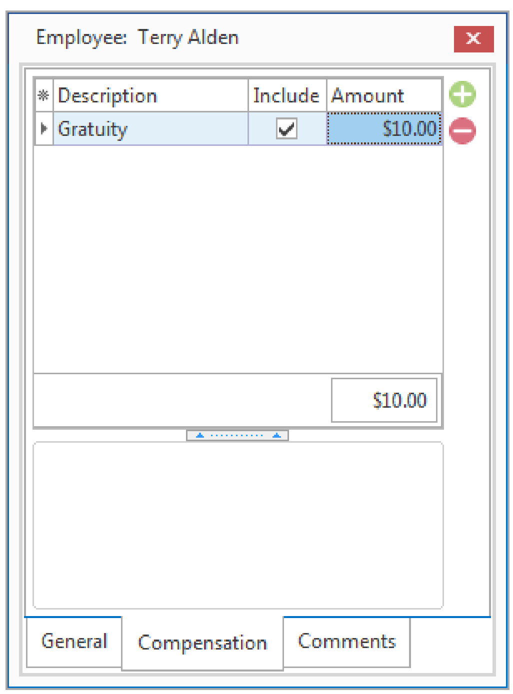
Field	Description
Conf	Displays a checkbox, indicating whether the employee has confirmed he or she can work the shift. To have employees automatically "confirmed" when they are selected into the event, click the **Settings** button, located at the top right-hand side of the Select Staffing window, and choose **Staff Selection > Select Staff as "Confirmed.**
Cost*	Calculates employee's wage times his total hours worked.
Comment	Offers a drop-down text box for you to enter specific comments pertaining to this employee.
	** Displayed in the Employee grid by default.*

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. Click the **Staffing** tab from a Sub-Event in Event Manager.
2. Click on the name of the employee who will receive additional compensation.
3. Click the **Show Staffing Details** button .
   Result: *The Employee window opens.*

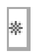


4. Click the **Compensation** tab, located at the bottom of the window.

5. Click the **Add Record** button , located on the upper right-hand side of the window.

6. Type into the Description field or click the down arrow and select from the drop-down quickpick list.
   Note: *This quickpick is set up in* ***Setup*** *>* ***Quickpicks*** *>* ***Subevent*** *>* ***Staffing*** *>* ***Additional Compensation Description****.*

7. Click into the **Include** checkbox to include the additional wage.

8. **[Optional]** Type into the Category field (not displayed by default) or click the down arrow and select an option from the drop-down quickpick list.
   Note: *Add the Category field by clicking the* ***Quick Column Customizing*** *button*  *and clicking into the* ***Category*** *checkbox.*
   This quickpick is set up in ***Setup*** *>* ***Quickpicks*** *>* ***Subevent*** *>* ***Staffing*** *>* ***Additional Compensation Category.***

9. 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.

10. Press **[Enter]**.

11. Click the **Close** button  at the top right-hand side of the screen 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:

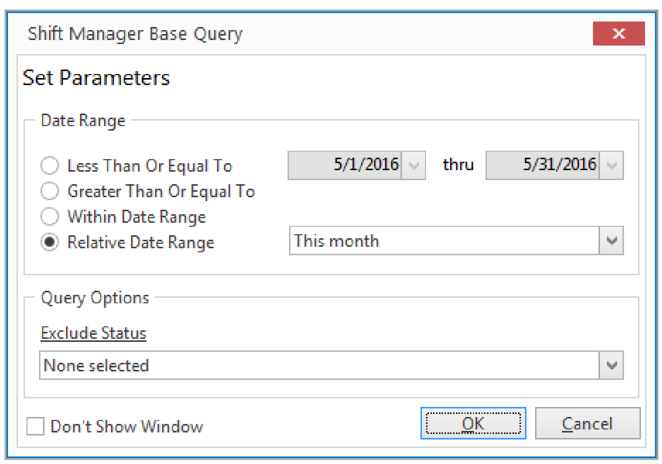
Upon completing this unit, you will be able to:

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

Displaying a Day/Date Range of Shifts

1. Click the **Tools** sidebar group from the left-hand side of your Caterease screen.

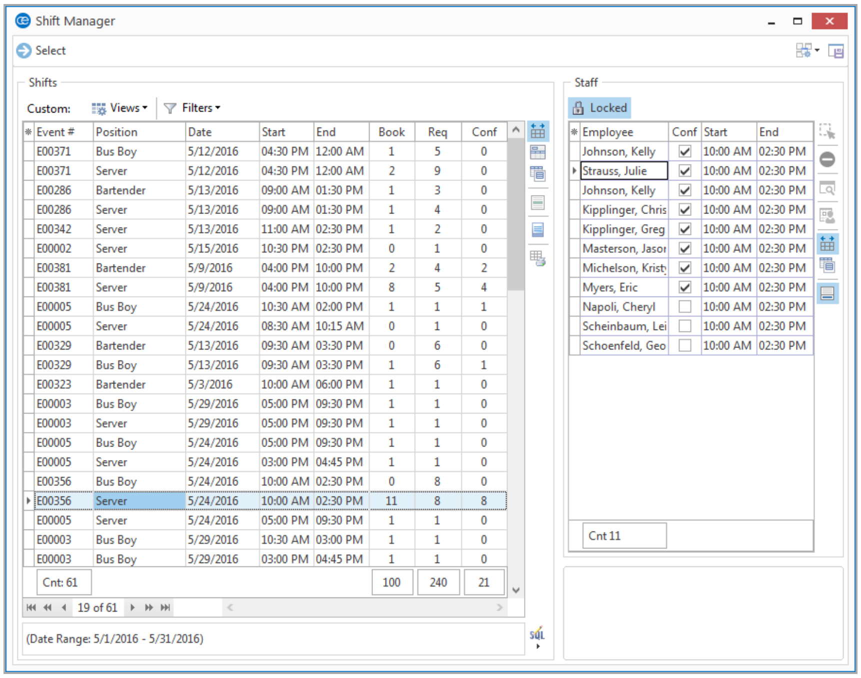
2. Click the **Shift Manager** button.
   Result: *The Shift Manager Base Query window opens.*



3. Set a date range for your query by choosing the option **Less Than or Equal To**, **Greater Than or Equal To** or **Within Date Range**, or choose a **Relative Date Range** for the query.

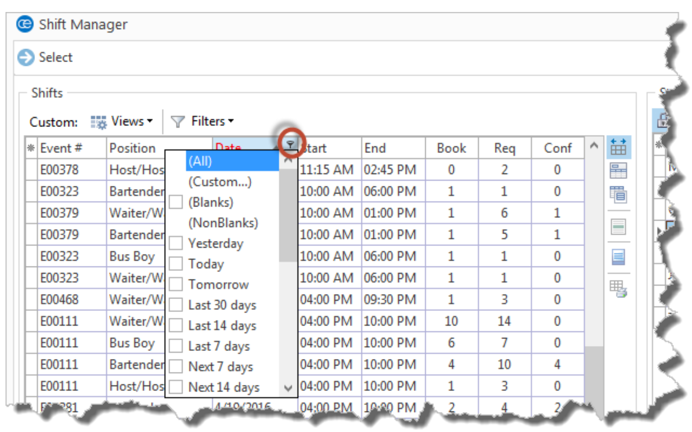
4. **[Optional]** Click the down arrow to the right of the Exclude Status field and select any event statuses you would like excluded from your query.

5. Click **OK**.
   Result: *The Shift Manager window opens.*



3. Click the funnel icon on the Date field to view the day/date range options.

4. Click into the desired checkbox.
Result: The grid will instantly reflect your selection.



Batch E-mailing a Confirmation Request

*Tip: Click into the **Don't Show Window** check-box if you would like to be taken directly to the Shift Manager results grid. You can modify your base query at any time by clicking the **SQL** button, located at the bottom of the window.*

As an ultimate time-saver, Caterease lets you generate an entire batch of e-mails — multiple e-mails to multiple recipients — with a single mouse click!

1. Click the **Tools** sidebar group from the left-hand side of your screen.

2. Click the **Shift Manager** button.
Result: The Shift Manager opens.

3. Generate the base query, as described above.

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.*

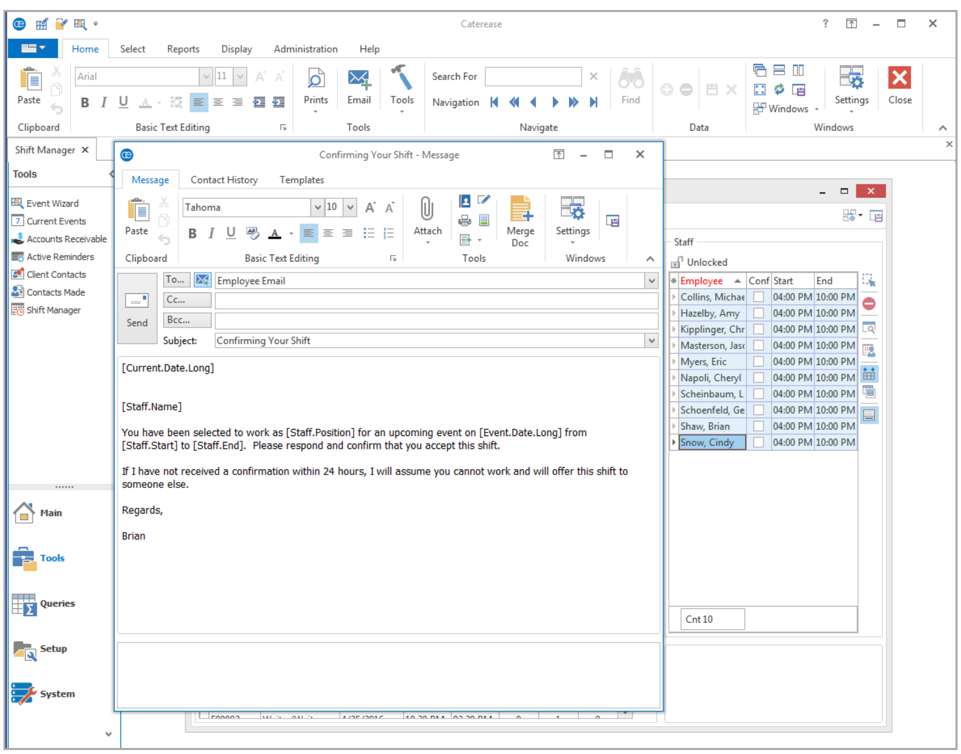
6. Click **Yes** to confirm your choice.
   Result: *The Staff section is unlocked and employees can be booked for the event.*

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 <u>Subject</u> field or click the down arrow and select an e-mail subject from the drop-down quickpick list.)
   Note: *Quickpicks can be set up for the <u>Subject</u> field via* ***Setup*** *>* ***Quickpicks*** *>* ***General*** *>* ***Email Subject.***

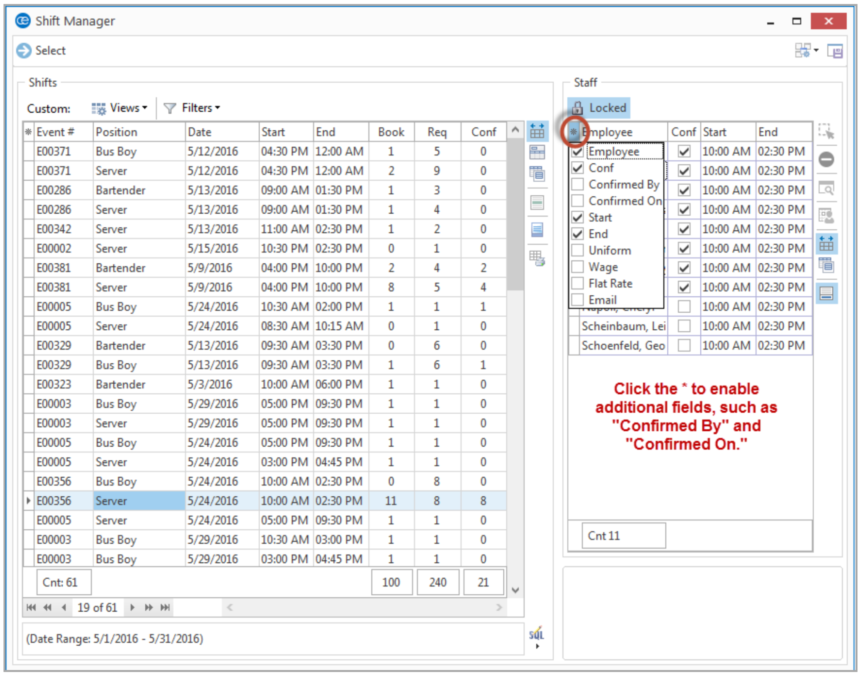
10. Click into the text block and type the body of the e-mail.
    Note: *If you own the Marketing Tools Package, you can click the* ***Merge Doc*** *button and select a custom merge document as the body of the outgoing e-mail.*



Confirming Staff for an Event

1. Click the **Tools** sidebar group from the left-hand side of your screen.
2. Click the **Shift Manager** button.
   Result: *The Shift Manager opens.*
3. Display a day/date range, as described previously.
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 confirmed 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.

   Note: *Click the* ***Quick Column Customizing*** *button to display additional columns, such as "Confirmed By" and Confirmed On."*
8. **[Optional]** Edit employee work times, if needed.
9. When finished, click the **Unlocked** button.
   Note: *Doing so will save your changes.*
10. Click the **Close** button at the top right-hand side of the screen to close the window.


Click the * to enable additional fields, such as "Confirmed By" and "Confirmed On."

Unit 5: Tracking Employee Information

You can view your scheduled staffing in multiple ways, including separate calendars based on a variety of staffing details.

Objectives:

Upon completing this unit, you will be able to:

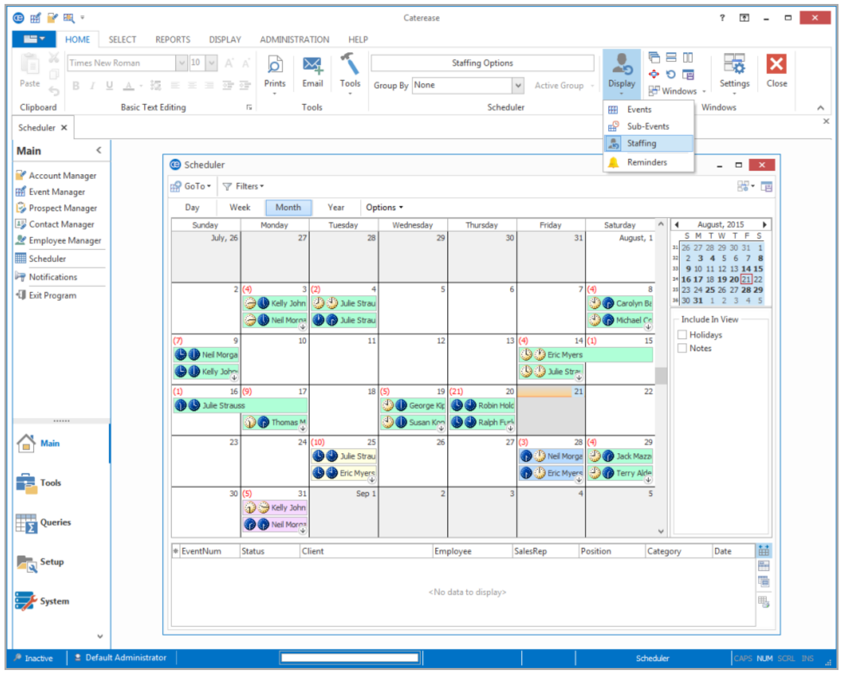
- *View employee staffing using multiple calendar views.*
- *Create groups of employee staffing calendars.*
- *Generate an employee staffing schedule report for any date range.*
- *Generate an employee staffing schedule in a diary format.*
- *Generate a report of all scheduled shifts within a day or 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 in the **Home** ribbon tab at the top of your 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. Additionally, you can add/remove columns, sort grid data, group grid data,*

print the grid, or export the data.

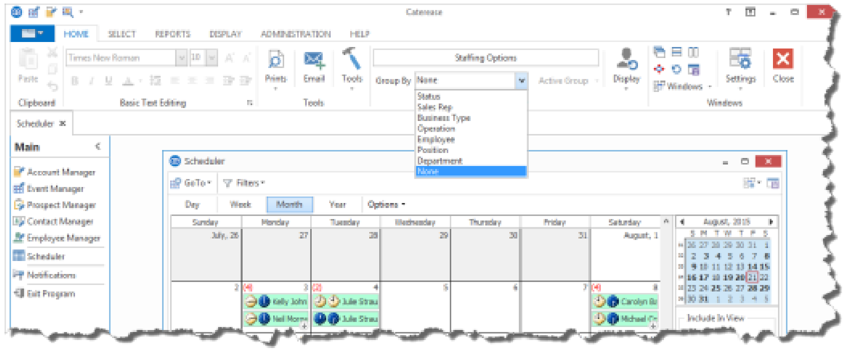


Creating Groups of Staffing Calendars

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, located in the **Home** ribbon tab at the top of your screen, and select **Staffing**.
3. Click the down arrow to the right of the **Group By** option.
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.*

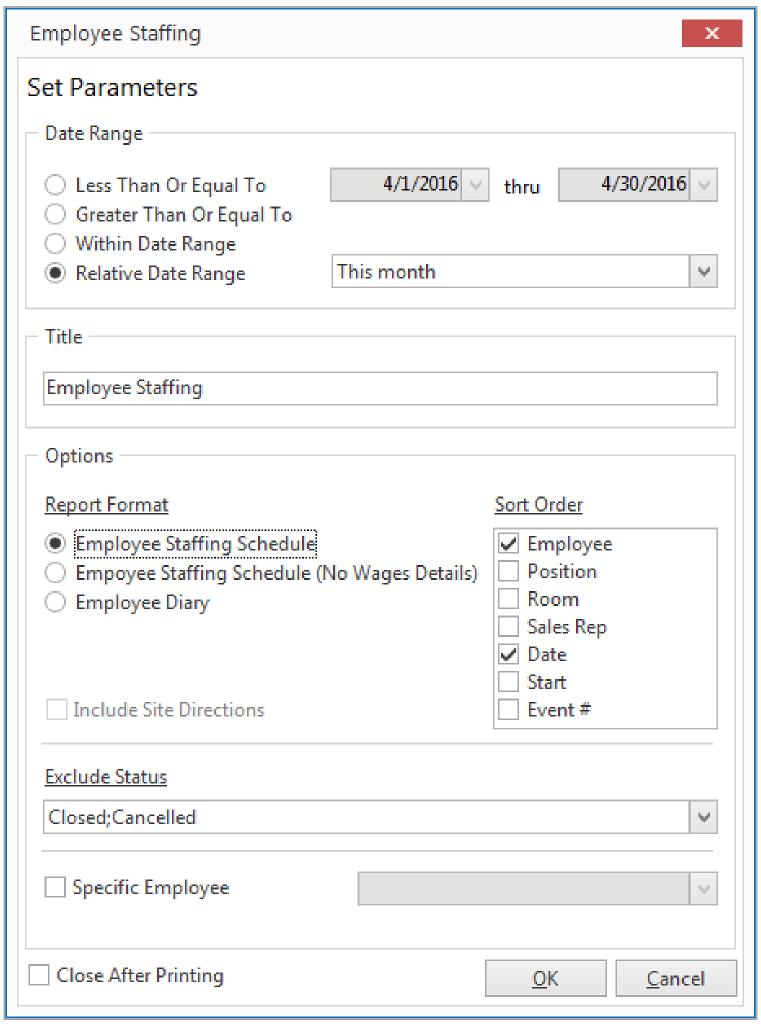
5. **[Optional]** Click into the checkboxes under **Sort Order** and choose to group Staffing items by a certain detail.
   Note: *You can drag and drop these fields to create a sort order.*

6. **[Optional]** Click into 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, 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.*

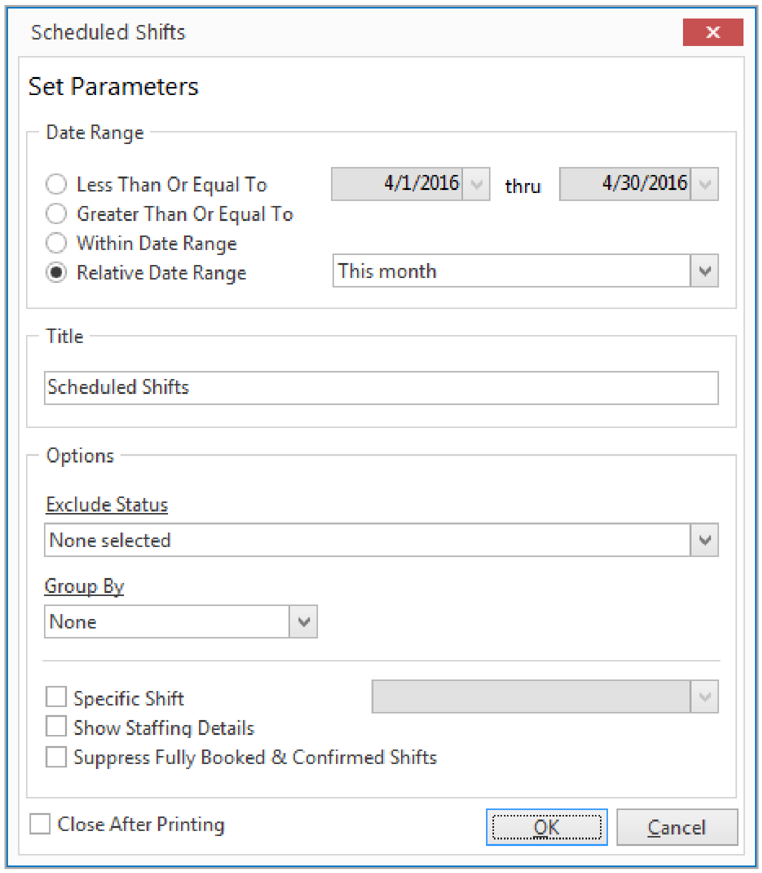


Printing a Scheduled Shifts Report

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 additional 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 into the **Specific Shift** checkbox, then the corresponding down arrow and select a position from the drop-down list.

7. **[Optional]** Click into the **Show Staffing Details** checkbox to include the assigned employee information.

8. **[Optional]** Click into 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.*

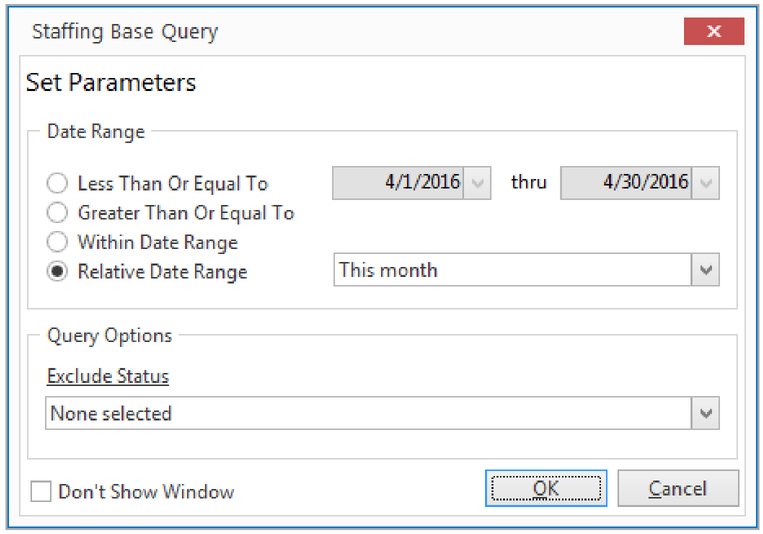
Running a Staffing Query

The Staffing 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 Query

1. Click the **Queries** button from the **Main** Caterease sidebar.

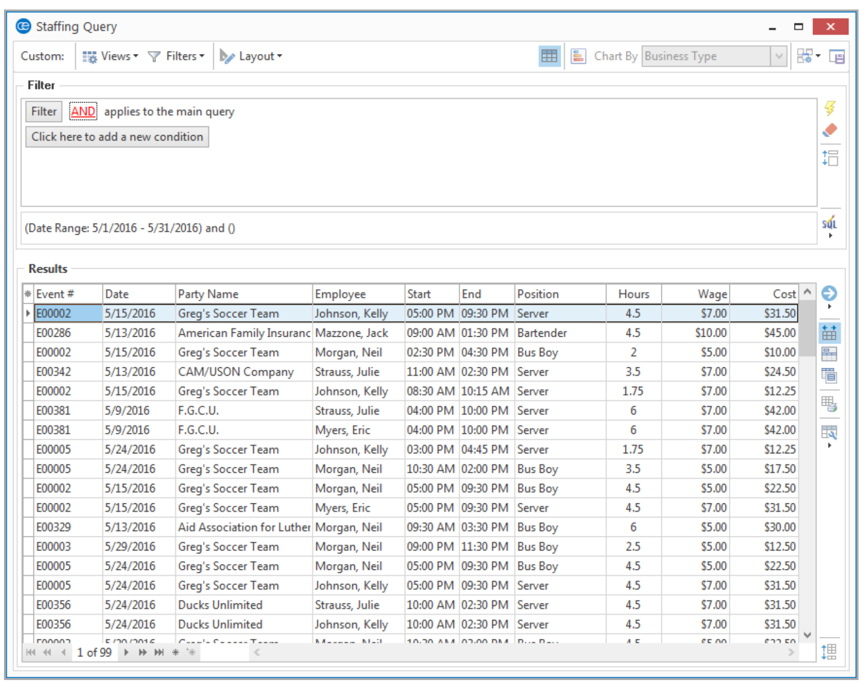
2. Click the **Staffing Query** button on the left-hand side of the screen.
   Result: *The Staffing Base Query window opens.*
   Note: *A Staffing Query for a particular event can be generated by clicking the **Staffing Activity for Event** button*  *from the **Staffing** tab in Event Manager.*



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 certain event statuses by making a selection from the drop-down list in the **Exclude Status** area.

5. Click **OK** to generate the query.
   Note: *Refer to the "Queries and Detail Grids" guide for detailed information about customizing your grids.*



caterease
catering + event planning solution

a product of
Horizon Business Services, Inc.
Naples, FL 34101
T: 239.261.6617
F: 239.261.0067
www.caterease.com
help@caterease.com