

# Training Guide

# Managing Your Staff in Employee Manager

# TABLE OF CONTENTS

<b>Unit 1: Creating Employee Manager Defaults</b>	<b>5</b>
Adding Employees	6
Filling Out the Address Tab	7
Adding Additional Employee Information	7
Adding Employee Related Files	9
Adding a Position	11
Establishing Shift Rules	13
Creating Shifts and Staffing Quickpick Lists	15
<b>Unit 2: Managing Your Default List of Employees</b>	<b>17</b>
Assigning a Position	18
Making an Employee Inactive	20
Setting an Employee Work Schedule	21
Setting a Work Schedule That Varies	22
Showing an Employee's Scheduled Events	29
Viewing Employees by Position	30
Viewing Employees by Day of the Week (Weekday Availability)	31
<b>Unit 3: Managing Your Event Staff</b>	<b>32</b>
Fields Available in the Staffing Grids	37
Adding Additional Employee Compensation	40
<b>Unit 4: Managing Multiple Shifts</b>	<b>42</b>
Batch E-mailing a Confirmation Request	44
Confirming Staff for an Event	46
<b>Unit 5: Tracking Employee Data</b>	<b>47</b>
Viewing Staffing in a Calendar	48

## TABLE OF CONTENTS

Creating Groups of Staffing Calendars .....	48
Printing an Employee Staffing Schedule .....	50
Printing a Scheduled Shifts Report .....	52
Running a Staffing Query .....	54

## Unit 1: Creating Employee Manager Defaults

In this section, you will learn:


- Adding Employees
- Filling Out the Address Tab
- Adding Additional Employee Information
- Adding Employee-Related Files
- Adding Shifts (Positions)
- Establishing Shift Rules
- Creating Employee Manager Quickpick Lists

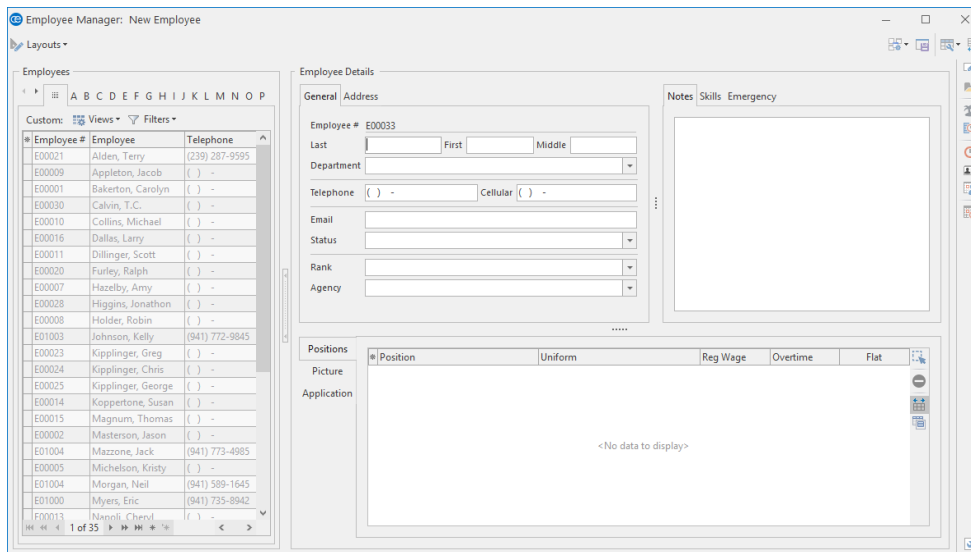


# Unit 1: Creating Employee Manager Defaults

In Employee Manager, 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.


## 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, in the **Home** ribbon tab.  
**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.



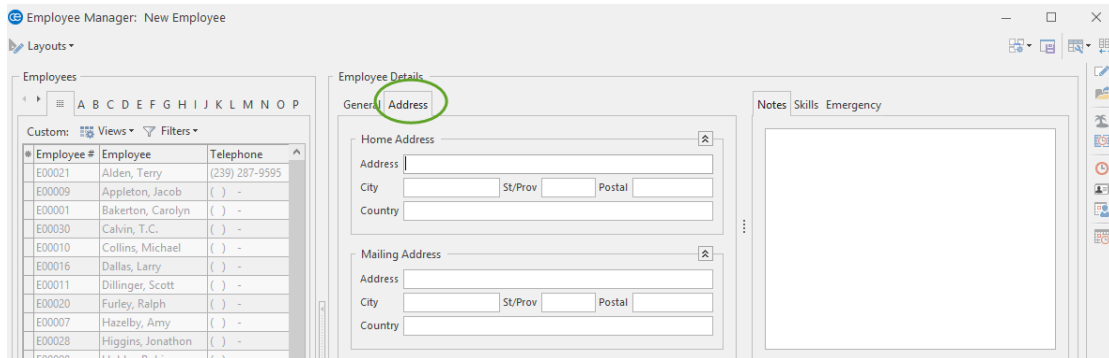
Employee #	Employee	Telephone
E00021	Alden, Terry	(239) 287-9595
E00009	Appleton, Jacob	( ) -
E00001	Bakerton, Carolyn	( ) -
E00030	Calvin, T.C.	( ) -
E00010	Collins, Michael	( ) -
E00016	Dallas, Larry	( ) -
E00011	Dillinger, Scott	( ) -
E00020	Furley, Ralph	( ) -
E00007	Hazelby, Amy	( ) -
E00028	Higgins, Jonathon	( ) -
E00008	Holder, Robin	( ) -
E01003	Johnson, Kelly	(941) 772-9845
E00023	Kipplinger, Greg	( ) -
E00024	Kipplinger, Chris	( ) -
E00025	Kipplinger, George	( ) -
E00014	Koppertone, Susan	( ) -
E00015	Magnum, Thomas	( ) -
E00002	Masterson, Jason	( ) -
E01004	Mazzone, Jack	(941) 773-4985
E00005	Michelson, Kristy	( ) -
E01004	Morgan, Neil	(941) 589-1645
E01000	Myers, Eric	(941) 735-8942
E00013	Napoli, Cheryl	( ) -

5. Type the employee's last name into the Last field.
6. Press **[Enter]** or **[Tab]** to move to the next field.
7. Type the employee's first name into the First field.
8. Fill out the remaining **General** tab fields by typing directly into the fields 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.


9. [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.



The screenshot shows the 'Employee Manager: New Employee' window. On the left is a list of employees with columns for Employee #, Employee Name, and Telephone. On the right is the 'Employee Details' form. The 'Address' tab is selected and highlighted with a green circle. The form contains two sections: 'Home Address' and 'Mailing Address'. Each section has fields for Address, City, St/Prov, Postal, and Country. The 'Notes' tab is also visible on the right side of the form.

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, 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.
7. When finished, click the **Save Changes** button , located in the **Home** ribbon tab at the top of your screen.

## Adding Additional Employee Information


1. [Optional] Click the **Notes** tab, located at the top right-hand side of your screen, if it is not already selected, and type any notes to associate 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.

2. [Optional] Click the **Skills** tab, located to the right of the **Notes** tab, at the top of your screen.

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

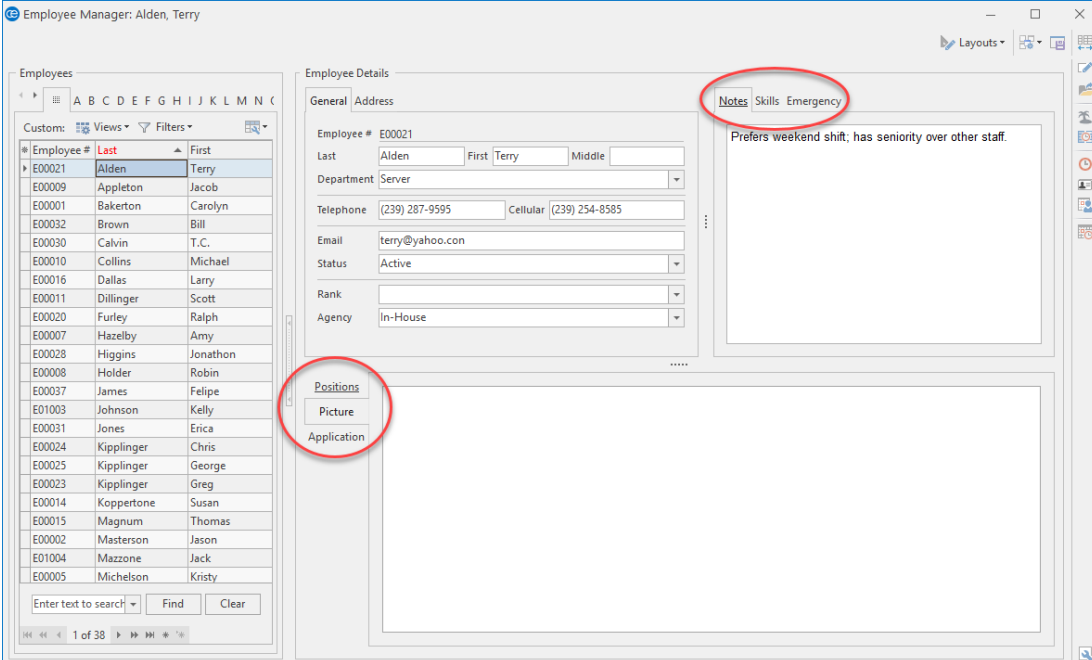
3. [Optional] Click into the **Skills** text box and type employee skills information (or use the Scratch Pad  to insert pre-typed text).

**Note:** You may format your text in both the **Notes** and **Skills** tabs by right-clicking into the text box and selecting **Font** or by using the **Basic Text Editing** tools at the top left-hand side of your screen.

4. [Optional] Click the **Emergency** tab, located at the top right of your screen, then click into the white text box and enter employee emergency contact information or medical-related information.
5. [Optional] To add a picture of the employee, click into the **Picture** tab, located towards the bottom of your screen. Next, right-mouse click into the empty text box, select **Load From File** from the pop-up menu, then browse to and select a stored employee picture.

6. [Optional] To attach the employee's supporting documents, such as a scanned image of a driver's license, click the **Application** tab, located towards the bottom of your screen. Next, right-mouse click into the text box, select **Load From File** from the pop-up menu, 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.



Employee Manager: Alden, Terry

Employees

Employee #	Last	First
E00021	Alden	Terry
E00009	Appleton	Jacob
E00001	Bakerton	Carolyn
E00032	Brown	Bill
E00030	Calvin	T.C.
E00010	Collins	Michael
E00016	Dallas	Larry
E00011	Dillinger	Scott
E00020	Furley	Ralph
E00007	Hazelby	Amy
E00028	Higgins	Jonathon
E00008	Holder	Robin
E00037	James	Felipe
E01003	Johnson	Kelly
E00031	Jones	Erica
E00024	Kiplinger	Chris
E00025	Kiplinger	George
E00023	Kiplinger	Greg
E00014	Koppertone	Susan
E00015	Magnum	Thomas
E00002	Masterson	Jason
E01004	Mazzone	Jack
E00005	Michelson	Kristy

Enter text to search: Find Clear

Employee Details

General Address

Employee # E00021

Last Alden First Terry Middle

Department Server

Telephone (239) 287-9595 Cellular (239) 254-8585

Email terry@yahoo.com

Status Active

Rank

Agency In-House

Notes Skills Emergency

Prefers weekend shift; has seniority over other staff.

Positions

Picture

Application



## 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 via 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

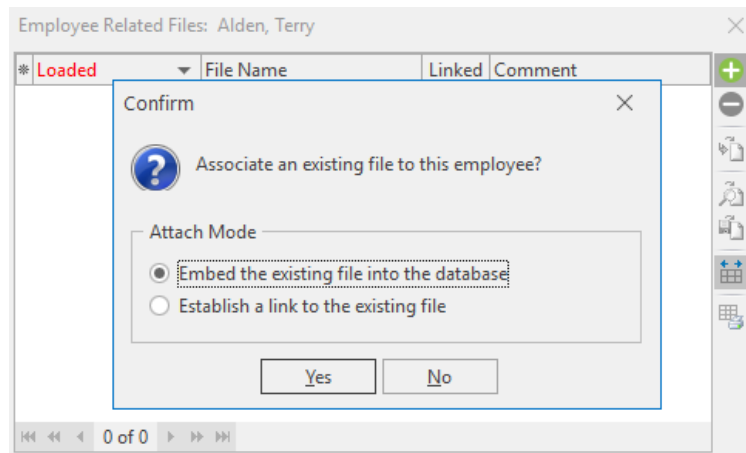
1. From the main Employee Manager screen, select an employee from the grid by clicking on the employee's name.
2. Click the **Tools** button, located in the **Home** ribbon tab at the top of your screen, and choose the

**Related Files** button .

**Result:** The Employee Related Files window opens.

**Note:** This button may also be accessed from the toolbar on the right-hand side 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 (Desktop only; a browse window opens if you are a Caterease Connect user).



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 by typing into the Comment field.

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


**Tip:** Click the **Delete** button to remove the file; click the **Replace File** button if you would like to replace the existing file with another file.

## 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 relevant 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.

### Adding a Position


You can create and store as many event staff positions as you'd like, such as wait staff, bartenders, hosts or hostesses, delivery drivers, meat carvers, setup staff, etc., and then assign each position its own set price, uniform, or even default shift times.

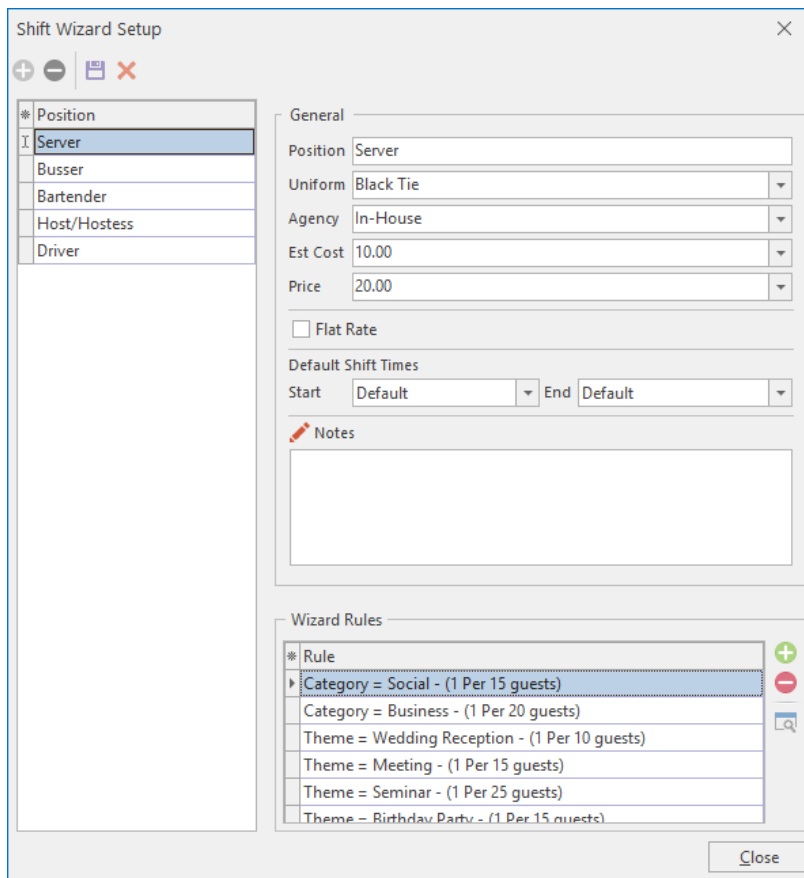
1. Click the **Main** button from the Caterease sidebar area, located on the left-hand side of your screen.
2. Click the **Employee Manager** button.
3. Click the **Tools** button, located in the **Home** ribbon tab at the top of the Employee Manager window, and choose **Shift Setup** (or click the **Shift Setup** button , located in the toolbar on the right-hand side 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 to the right of the field 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**.
9. **[Optional]** In the Agency field, type the employment agency name (if applicable) or click the down arrow to the right of the field 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 into 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 lists.  
***Note:** The **Default Shift Times** are set to the Start and End times associated with the sub-event.*
14. **[Optional]** Click into the **Notes** text box 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 Changes** button , located at the top left-hand side of the window.  
***Result:** The Position is saved.*
17. Click **Close** to close the window.



Shift Wizard Setup

Position: Server

Uniform: Black Tie

Agency: In-House

Est Cost: 10.00

Price: 20.00

☐ Flat Rate

Default Shift Times

Start: Default End: Default

Notes

Wizard Rules



- \* Rule
- Category = Social - (1 Per 15 guests)
- Category = Business - (1 Per 20 guests)
- Theme = Wedding Reception - (1 Per 10 guests)
- Theme = Meeting - (1 Per 15 guests)
- Theme = Seminar - (1 Per 25 guests)
- Theme = Birthday Party - (1 Per 15 guests)

Close

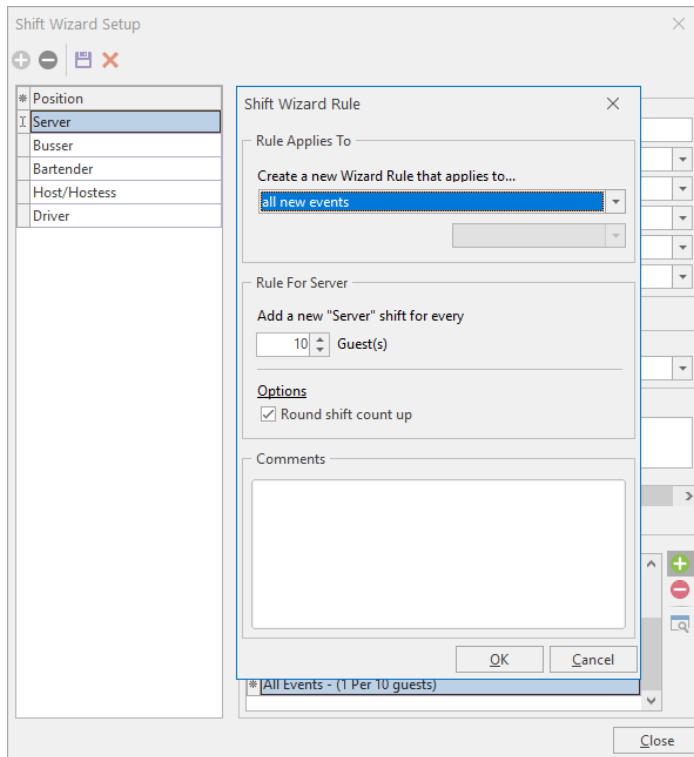
## Establishing Shift Rules


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. You can 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.)

### 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  from the toolbar on the right-hand side 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, use the up-and-down arrows to adjust the number of guests to add for every shift (or type directly into the field).
9. **[Optional]** Click into the checkbox under **Options** to round the shift count up, if needed.

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



11. Click **OK** to close the Shift Wizard Rule window.
12. Click the **Save Changes** 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 right-hand side of the Shift Wizard Setup window to close the 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 they help keep your data consistent.

### Creating Shifts and Staffing Quickpick Lists

1. Click the **Quickpicks** button from the **Setup** sidebar.

**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**.

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

4. Click the expand button to the left of **Shifts**.

5. Click **Category**.

6. Click the **Add New Item** button , located on the upper right-hand side of the window.

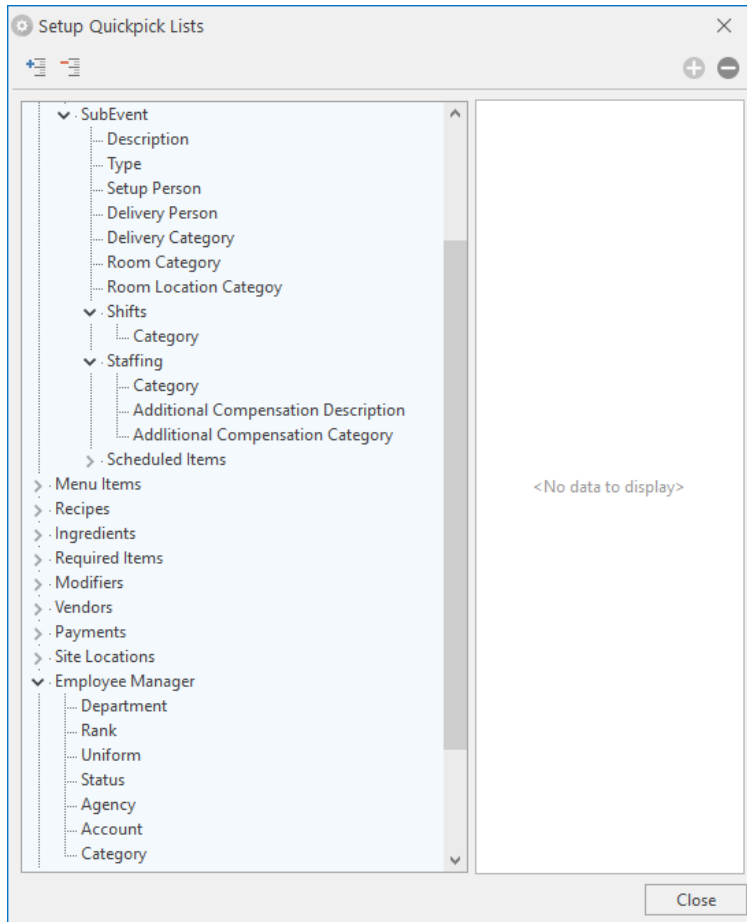
**Result:** *A blank line is added to the bottom of the list.*

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

8. When finished adding Shifts quickpicks, click the expand button 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 adding quickpicks, click **Close**.



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



## Unit 2: Managing Your Default List of Employees

In this section, you will learn:

- Assigning a Position to an Employee
- Making an Employee Inactive
- Setting a Defined Employee Work Schedule
- Setting an Employee Work Schedule That Varies from Week to Week
- Establishing Employee Vacation Days
- Clearing Selected Vacation Dates
- Clearing All Vacation Dates
- Adding Vacation Notes
- Showing an Employee's Scheduled Events
- Viewing Employees by Position
- Viewing Employees by Day of the Week (Weekday Availability)






## Unit 2: Managing Your Default List of Employees

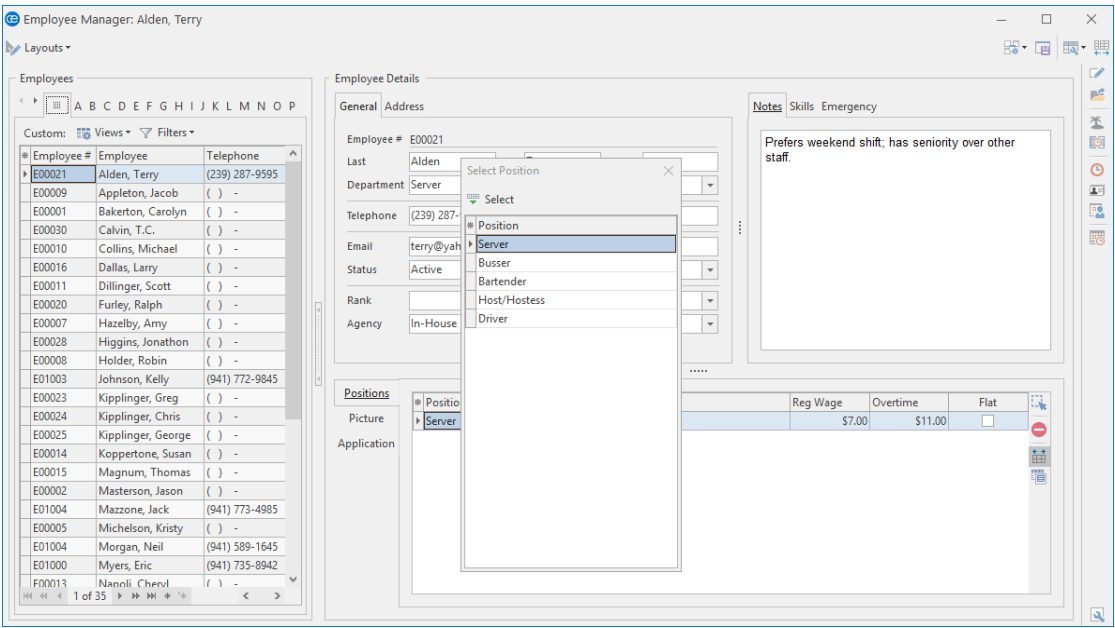
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### Assigning a Position to an Employee

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 on the **Positions** tab, located towards the middle of your screen, if it is not already selected, for the employee for whom you would like to assign a position.
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.  
**Note:** You can select more than one position.
4. Click the  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.
6. Press **[Tab]** or **[Enter]** to move to the next field.
7. Click into the Reg Wage field and type the employee's 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's 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 checkbox to place a check mark.
10. When finished adding position details, save your changes by clicking the **Save Changes** button , located in the **Home** ribbon tab at the top of your screen.

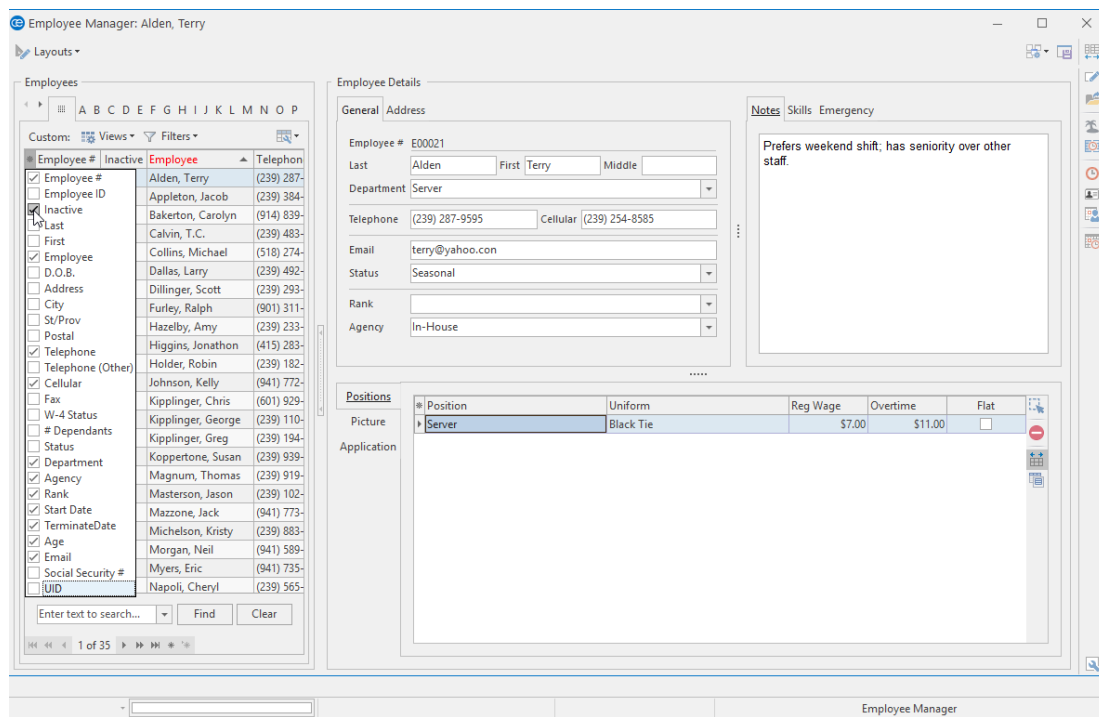


## Making an Employee Inactive

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 as "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 **Quick Column Customizing** button , located on the upper left-hand side of your screen, to the left of the **Employee #** field.  
*Result: A drop-down list of available columns displays.*
3. Click into the **Inactive** checkbox.  
*Result: A check appears in the checkbox, and the **Inactive** column displays in the grid.*
4. 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.*
5. Click the **Save Current Window Settings** button  if you would like the new layout (reflecting the **Inactive** column) to serve as your default.

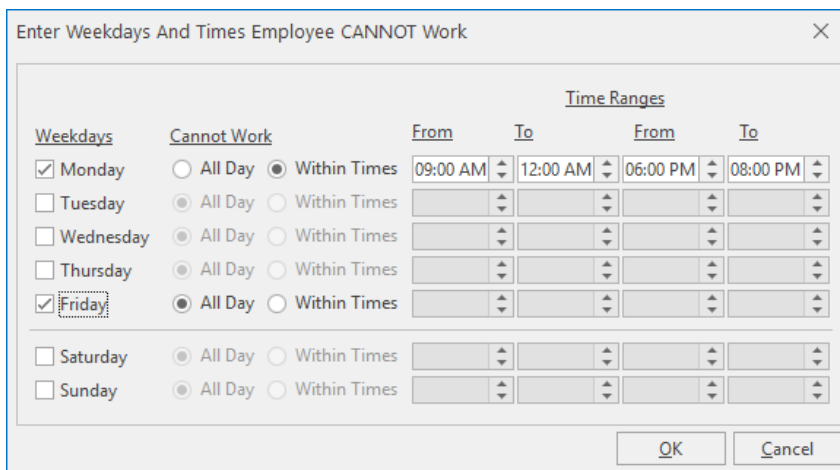


## Setting a Defined Employee Work Schedule

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 work 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 in the toolbar on the right-hand side of your 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 From and To fields.
5. If **Within Times** is selected, type a **From** and a **To** time into the fields (or use the up-and-down arrows to the right of the field to adjust the times).  
**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 save your changes and close the window.






Weekdays	Cannot Work	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 AM	06:00 PM	08:00 PM
<input type="checkbox"/> Tuesday	<input checked="" type="radio"/> All Day <input type="radio"/> Within Times				
<input 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 checked="" type="radio"/> All Day <input type="radio"/> Within Times				
<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				

OK Cancel

## 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 in the toolbar on the right-hand side 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 desired start date.
4. Drag the mouse to the end date, then release.
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 enabled.*
7. **[Optional]** Click into the **Vacation Day Notes** text box and type any relevant notes.
8. When finished, click **OK**.
9. Click the **Close** button  to close out of the Employee Vacation Days window.

Employee Manager: Alden, Terry

Layouts ▾

Employees

Custom: Views ▾ Filters ▾

Employee #	Employee	Telephone
E00021	Alden, Terry	(239) 287-9595
E00009	Appleton, Jacob	(239) 384-8884
E00001	Bakerton, Carolyn	(914) 839-2944
E00030	Calvin, T.C.	(239) 483-9111
E00010	Collins, Michael	(518) 274-8199
E00016	Dallas, Larry	(239) 492-9994
E00011	Dillinger, Scott	(239) 293-0100
E00020	Furley, Ralph	(901) 311-8283
E00007	Hazelby, Amy	(239) 233-9191
E00028	Higgins, Jonathon	(415) 283-8881
E00008	Holder, Robin	(239) 182-9311
E01003	Johnson, Kelly	(941) 772-9845
E00024	Kiplinger, Chris	(601) 929-3311
E00025	Kiplinger, George	(239) 110-1010
E00023	Kiplinger, Greg	(239) 194-0002
E00014	Koppertone, Susan	(239) 939-1199
E00015	Magnum, Thomas	(239) 919-2200
E00002	Masterson, Jason	(239) 102-0410
E01004	Mazzone, Jack	(941) 773-4985
E00005	Michelson, Kristy	(239) 883-0210
E01004	Morgan, Neil	(941) 589-1645
E01000	Myers, Eric	(941) 735-8942
E00013	Napoli, Cheryl	(239) 565-7555

Enter text to search... Find Clear

1 of 35

Employee Details

General Address Notes Skills Emergency

Employee # E00021

Last Employee Vacation Days (Alden, Terry).

Notes

Save Vacation Days

Vacation Day Properties

☒ Off All Day

☐ Between Times From 12:00 AM To 12:00 AM

Vacation Day Notes


OK Cancel

Calendar view showing months from April 2018 to March 2019. The calendar displays days of the week (S M T W T F S) and dates. The current date is April 1, 2018.

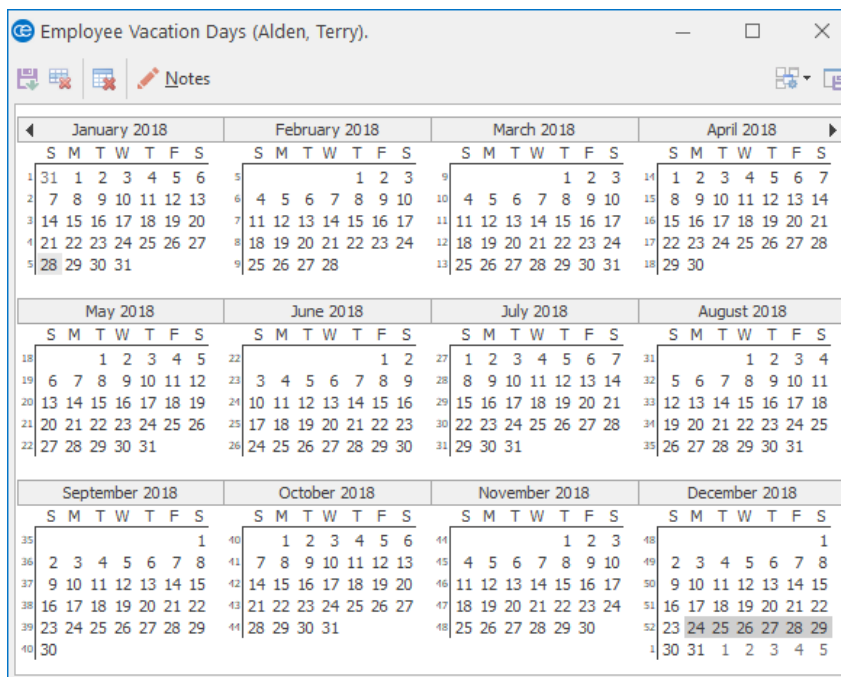
## Establishing Employee Vacation Days


The Employee 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  from the toolbar on the right-hand side of your screen, depending upon your personal configuration.

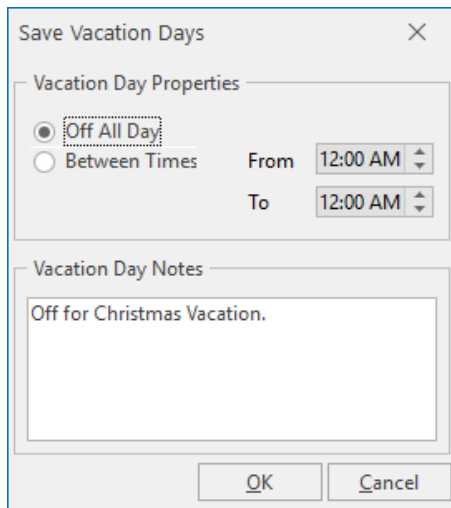
**Result:** The *Employee Vacation Days* window opens.




3. Click and hold your left mouse button down on the vacation start date.
4. Drag the mouse to the vacation end date, then release the mouse button.
5. Click the **Set Selected Dates** button  from the top left-hand side of the window.

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




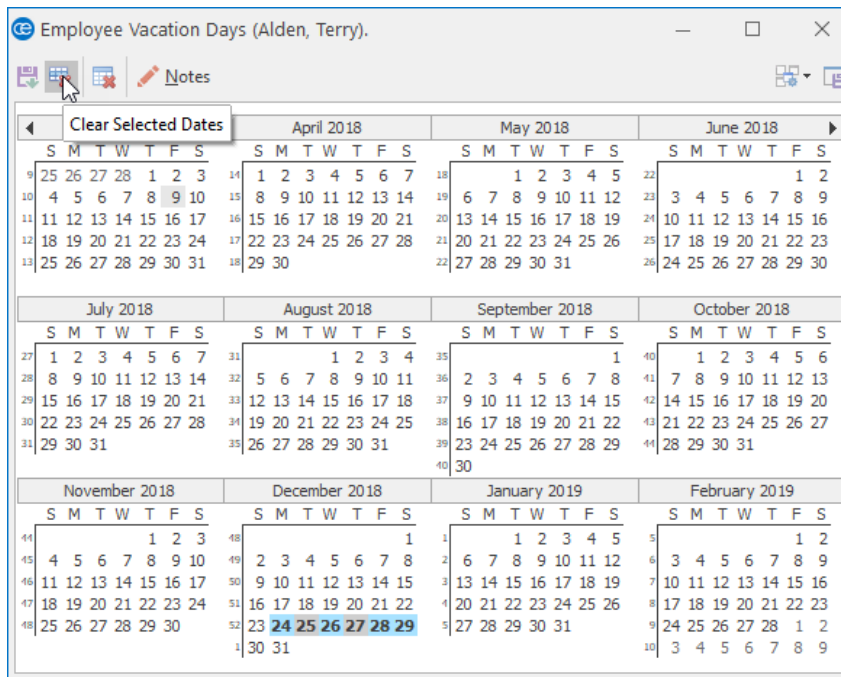


The screenshot shows a 'Save Vacation Days' dialog box. It has a title bar with a close button. Below the title bar is a section titled 'Vacation Day Properties' containing two radio buttons: 'Off All Day' (which is selected) and 'Between Times'. To the right of the 'Between Times' radio button are 'From' and 'To' time fields, both set to '12:00 AM'. Below this is a section titled 'Vacation Day Notes' with a text area containing the text 'Off for Christmas Vacation.' At the bottom of the dialog are 'OK' and 'Cancel' buttons.

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 into the **Vacation Day Notes** text block and type any relevant vacation notes.
8. When finished, click **OK**.
9. Click the **Close** button  at the top right-hand side of the window to close the Employee Vacation Days window.

## 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  from the toolbar at the right-hand side 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 .

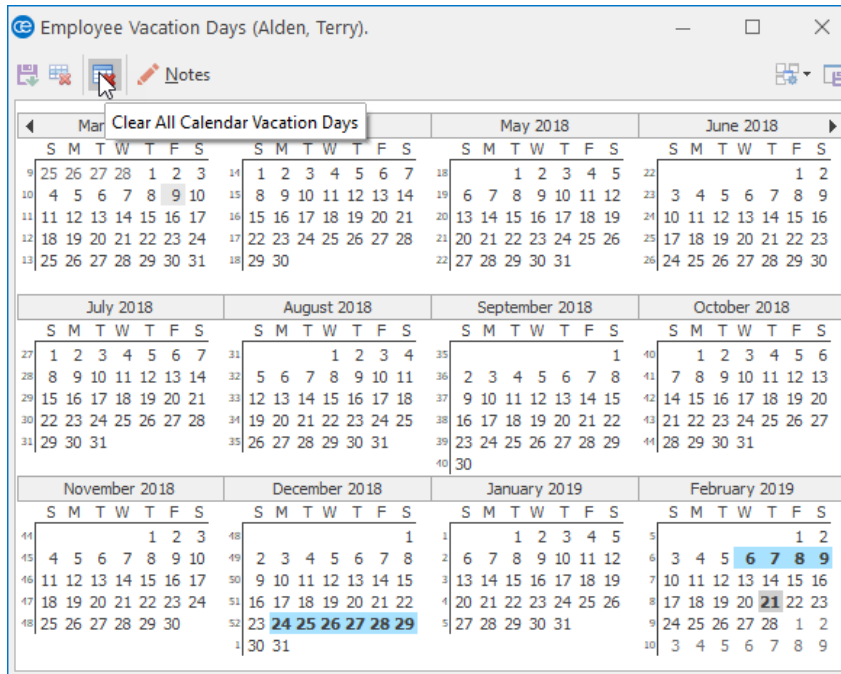
6. Click the **Close** button  at the top right-hand side of the window to close the window.



## 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  from the toolbar on the right-hand side of your screen, depending upon your personal configuration.

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

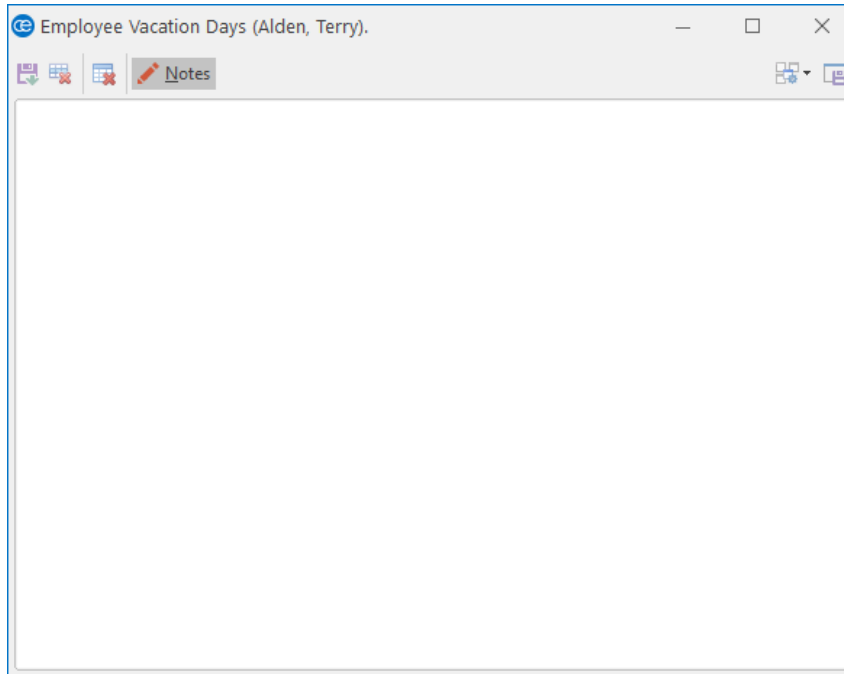



3. Click the **Clear All Calendar Vacation Days** button  to remove **all** vacation days for a particular employee.  
**Result:** A confirmation prompt appears.
4. Click **Yes** to confirm your choice.
5. Click the **Close** button  at the top right-hand side of the window to close the window.

## Adding Vacation Notes

1. From your Employee Manager main screen, click on the name of the employee for whom you plan to add a vacation-related 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  from the toolbar on the right-hand side of your screen, depending upon your personal configuration.

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




3. Click the **Notes** button.  
**Result:** *A text box opens.*
4. Type into the text box 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 window 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/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 in the toolbar on the right-hand side 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.

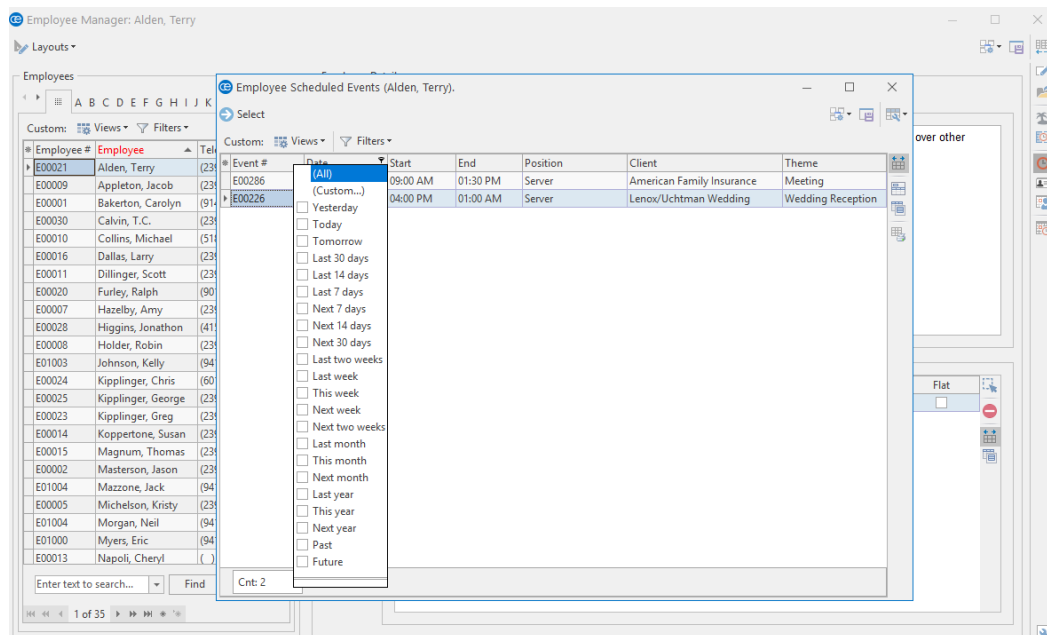
4. Click the funnel icon , select a relative date, and click into the corresponding checkbox.

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 your 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 high-lighted event to retrieve an event into Event Manager. (You can also double-click on the record.)

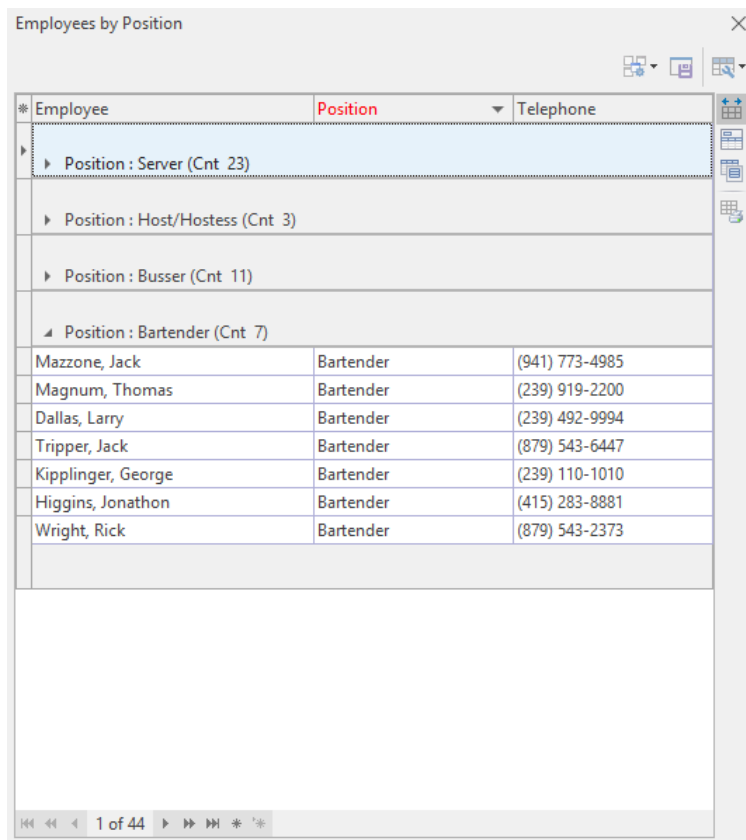


## Viewing Employees by Position



You can generate 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  from the toolbar on the right-hand side of your screen, depending on your personal configuration.  
**Result:** The *Employees by Position* window opens.



* Employee	Position	Telephone
▶ Position : Server (Cnt 23)		
▶ Position : Host/Hostess (Cnt 3)		
▶ Position : Busser (Cnt 11)		
▲ Position : Bartender (Cnt 7)		
Mazzone, Jack	Bartender	(941) 773-4985
Magnum, Thomas	Bartender	(239) 919-2200
Dallas, Larry	Bartender	(239) 492-9994
Tripper, Jack	Bartender	(879) 543-6447
Kiplinger, George	Bartender	(239) 110-1010
Higgins, Jonathon	Bartender	(415) 283-8881
Wright, Rick	Bartender	(879) 543-2373

2. **[Optional]** Customize the grid by sorting or grouping the grid data.
3. Click the expand button  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 , located in the toolbar on the right-hand side of your screen.

**Result:** The *Employees by Weekday Availability* window opens.

**Tip:** Click the **Print Grid** button, located on the upper right-hand side of the window, to generate a print preview of the window.

Day Of Week <span>Monday</span>			
Employee	Telephone	City	Conditions
Mazzone, Jack	(941) 773-4985	Naples	
Johnson, Kelly	(941) 772-9845	Naples	
Morgan, Neil	(941) 589-1645	Naples	
Bakerton, Carolyn	(914) 839-2944	Naples	Cannot Work: 09:00 am - 12:00 ...
Masterson, Jason	(239) 102-0410	Naples	
Roop, George	(453) 678-4633	Naples	
Scheinbaum, Leila	(239) 543-2626	Naples	
Michelson, Kristy	(239) 883-0210	Naples	Cannot Work: 09:00 am - 10:00 ...
Shaw, Brian	(239) 657-5733	Naples	
Hazelby, Amy	(239) 233-9191	Naples	
Holder, Robin	(239) 182-9311	Naples	
Collins, Michael	(518) 274-8199	Naples	
Dillinger, Scott	(239) 293-0100	Naples	
Schoenfeld, George	(850) 076-4463	Naples	Cannot Work: 04:00 pm - 10:00 ...
Napoli, Cheryl	(239) 565-7555	Naples	
Koppertone, Susan	(239) 939-1199	Naples	
Magnum, Thomas	(239) 919-2200	Naples	
Dallas, Larry	(239) 492-9994	Naples	
Tripper, Jack	(879) 543-6447	Naples	
Snow, Christy	(239) 573-3200	Naples	

2. Click the drop-down arrow to the right of **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 window to close the window.

**Note:** You may also print the window's contents by clicking the **Print Grid** button , located on the upper right-hand side of the window.

## Unit 3: Managing Your Event Staff

In this section, you will learn:

- Selecting Event Staff
- Managing Event Shifts
- Viewing Shift Cost Estimates
- Customizing the Shift and Employee Grids in Event Manager
- Printing a Staffing Sheet for an Event
- Adding Additional Employee Compensation





### Adding and Managing Staffing for an Event

You can select the shifts required for an event (how many waiters, bartenders, etc., are required) or select specific employees to work those shifts. Both of these details can be easily tracked for one single event or for an entire day or date range.

**Important Note:** There are two grids displayed on the **Staffing** tab in Event Manager: The grid listing specific employees working events resides within a larger grid listing the scheduled shifts. The topic "Fields Available in the Staffing Grids," below, offers information on customizing these grids.

### Selecting Event Staff

1. In the Event Manager, click the **Sub-Event** button, located next to the **Event** button on the left-hand side of your screen.

**Result:** The Event Manager switches to the Sub-Event display.

2. Select a sub-event (if more than one) in the pane on the left-hand side of your screen.

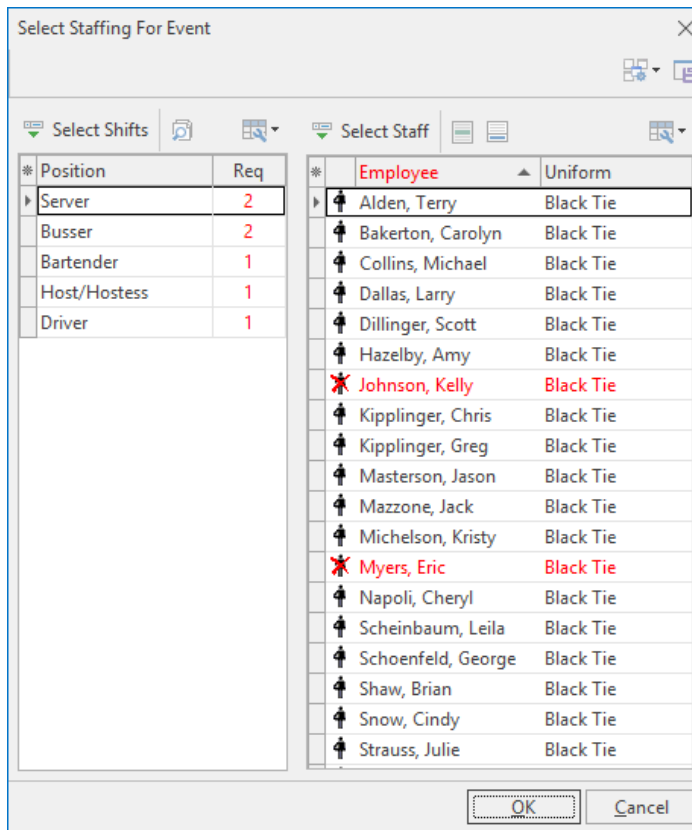
**Note:** The number of sub-events associated with the current event is indicated at the bottom of the sub-event pane on the left-hand side of the screen. You can use the scroll bar at the right of the pane or the navigation bar below the pane to scroll through the sub-events.

3. Click the **Staffing** tab at the bottom of your screen.

4. Click the **Select Staff** button , located at the right of the **Staffing** tab.

**Result:** The Select Staffing for Event window opens, with employees separated into groups based on their positions.

**Tip:** In addition to (or instead of) tracking specific employees, you can also simply keep track of "shifts" for an event (how many unnamed "waiters" or "bartenders" the party will require).



5. In the left pane of the window, click on the "position," or shift ("Waiter/Waitress," "Bartender," "Busser," etc.), that you want to schedule.

**Result:** The right-hand pane of the window displays the list of employees for that specific position.

**Note:** Employees whose names display in red font are unavailable to work this event. Click the **View**

**Conflicts** button  on the Select Staff window to see why.

6. Select any available employees (drag your mouse or use your **[Ctrl]** key to select more than one at a time).

**Note:** To select an unavailable employee (one highlighted in red), you must first click the **Settings** but-


ton  at the top right-hand side of the window and choose **Staff Selection > Allow Selection of**

**Unavailable Employees.** (Click the **Save Window Settings** button  to have this option default as enabled.)

7. Click **OK**.

**Result:** The selected employees are added to the **Staffing** tab of the event, with their Start and End times defaulting to whichever event times you have established as the defaults for their shifts.

**Note:** As an alternative to clicking **OK**, you can drag and drop selected employees from the Select Staff window onto the **Staffing** tab in Event Manager, or you can click the **Select Staff** button.

8. **[Optional]** On the **Staffing** tab in Event Manager, click into the checkbox in the Conf column for any employees who have confirmed they can work this party. Click into the checkbox in the Flat column to optionally make the employee's wage a "flat" wage (not multiplied by hours worked).  
**Note:** 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."**

## Managing Event Shifts

1. In the Event Manager, click the **Sub-Event** button, located next to the **Event** button on the left-hand side of the screen.

**Result:** The Event Manager switches to the Sub-Event Display.

2. Select a sub-event (if there are more than one) in the pane on the left-hand side of the screen.

**Note:** The number of sub-events associated with the current event is indicated at the bottom of the sub-event pane on the left-hand side of the screen. You can use the scroll bar at the right of the pane or the navigation bar below the pane to scroll through the sub-events.

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

4. Click the **Select Staff** button , located at the right of the **Staffing** tab.


**Result:** The Select Staffing for Event window opens, with employees separated into groups based on their positions.

5. In the Select Staffing window, double-click on any shift ("Waiter," "Bartender," etc.), to retrieve it into the sub-event.

**Result:** That shift - complete with optional price, required number, etc. - is added to the **Staffing** tab in the sub-event. (See "Customizing the Shift and Employee Grids," below, for information on how to display these details in your shifts grid.)

**Note:** You can also highlight multiple shifts by dragging or dropping or using your **[Ctrl]** or **[Shift]** key, then clicking **OK** to retrieve.

6. Repeat Step 5 to retrieve other shifts as desired.

7. **[Optional]** Click the **View Shift Rules** button  to see the specific rule (created by you) that the program used to calculate the required number for a particular shift.

**Note:** Shift rules are established by you when you set up your program's shifts.

8. When finished, click **OK** to close the Select Staff window.

**Tip:** You can use the *Caterease Shift Wizard* to establish rules dictating how many of each shift is required to service a particular event. These required numbers will automatically calculate for each party, and reports and management tools allow you track events that are understaffed.

## Viewing Shift Cost Estimates

1. Click the **Quick Column Customizing** button , located at the top left of the **Position** grid on the **Staffing** tab.

**Result:** A drop-down list of optional columns opens.

**Note:** There are two buttons available, as there are two grids - one for "shifts" and another for "employees." See topic above for a list of available columns for each grid.

2. Click in the checkbox to the left of the Est Cost field.

**Note:** You may also add other fields, such as Total Cost and Price, for comparison purposes.

3. Click the **Select Staff** button , located at the right of the **Staffing** tab.

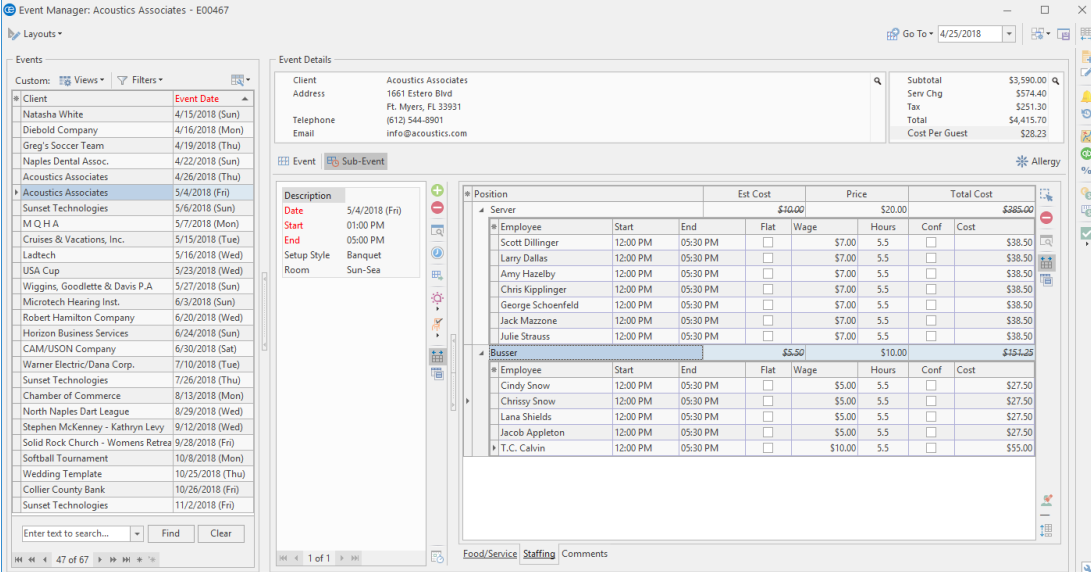
**Result:** The *Select Staffing* window opens, with employees separated into groups based on their positions.

4. In the left pane of the window, click the "position," or shift ("Waiter/Waitress," "Bartender," "Bus Boy," etc.), that you want to schedule.

**Result:** The right pane of the window displays the list of employees for that specific position.

**Note:** 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.

**Tip:** If you want the Estimated Cost column (and other columns you have added to the grid) to be displayed as a default, click the **Save Current Window Settings** button at the top right-hand side of the *Event Manager* window.



Event Manager: Acoustics Associates - E00467

Layouts

Go To: 4/25/2018

Events

Custom: Views Filters

Event	Event Date
Natasha White	4/15/2018 (Sun)
Diebold Company	4/16/2018 (Mon)
Greg's Soccer Team	4/19/2018 (Thu)
Naples Dental Assoc.	4/22/2018 (Sun)
Acoustics Associates	4/26/2018 (Thu)
Acoustics Associates	5/4/2018 (Fri)
Sunset Technologies	5/6/2018 (Sun)
M Q H A	5/7/2018 (Mon)
Cruises & Vacations, Inc.	5/15/2018 (Tue)
Ladtech	5/16/2018 (Wed)
USA Cup	5/23/2018 (Wed)
Wiggins, Goodlette & Davis P.A.	5/27/2018 (Sun)
Microtech Hearing Inst.	6/3/2018 (Sun)
Robert Hamilton Company	6/20/2018 (Wed)
Horizon Business Services	6/24/2018 (Sun)
CAM/USON Company	6/30/2018 (Sat)
Warner Electric/Dana Corp.	7/10/2018 (Tue)
Sunset Technologies	7/26/2018 (Thu)
Chamber of Commerce	8/13/2018 (Mon)
North Naples Dart League	8/29/2018 (Wed)
Stephen McKenney - Kathryn Levy	9/12/2018 (Wed)
Solid Rock Church - Womens Retreat	9/28/2018 (Fri)
Softball Tournament	10/8/2018 (Mon)
Wedding Template	10/25/2018 (Thu)
Collier County Bank	10/26/2018 (Fri)
Sunset Technologies	11/2/2018 (Fri)

Enter text to search... Find Clear

Event Details

Client: Acoustics Associates  
Address: 1661 Estero Blvd  
P.O. Box 33931  
Tel: 813 544-8901  
Email: info@acoustics.com

Subtotal: \$3,590.00  
Serv Chg: \$574.40  
Tax: \$251.30  
Total: \$4,415.70  
Cost Per Guest: \$28.23

Event Sub-Event


Description: 5/4/2018 (Fri)  
Start: 01:00 PM  
End: 05:00 PM  
Setup Style: Banquet  
Room: Sun-Sea

Position	Start	End	Flat	Wage	Hours	Conf	Cost
Server							\$285.00
Employee							
Scott Dillinger	12:00 PM	05:30 PM		\$7.00	5.5		\$38.50
Larry Dallas	12:00 PM	05:30 PM		\$7.00	5.5		\$38.50
Amy Hazelby	12:00 PM	05:30 PM		\$7.00	5.5		\$38.50
Chris Kipplinger	12:00 PM	05:30 PM		\$7.00	5.5		\$38.50
George Schoenfeld	12:00 PM	05:30 PM		\$7.00	5.5		\$38.50
Jack Mazonne	12:00 PM	05:30 PM		\$7.00	5.5		\$38.50
Julie Strauss	12:00 PM	05:30 PM		\$7.00	5.5		\$38.50
Busser							\$10.00
Employee							
Cindy Snow	12:00 PM	05:30 PM		\$5.00	5.5		\$27.50
Chrissy Snow	12:00 PM	05:30 PM		\$5.00	5.5		\$27.50
Lana Shields	12:00 PM	05:30 PM		\$5.00	5.5		\$27.50
Jacob Appleton	12:00 PM	05:30 PM		\$5.00	5.5		\$27.50
T.C. Calvin	12:00 PM	05:30 PM		\$10.00	5.5		\$55.00

Food/Service Staffing Comments

# Customizing the Shift and Employee Grids

**Tip:** If you want the new columns you've selected to be displayed in the staffing grids as a default, click the **Save Current Window Settings** button at the top right of the Event Manager window.

1. Click the **Quick Column Customizing** button , located at the top left of the Shift or Employee grid on the **Staffing** tab.

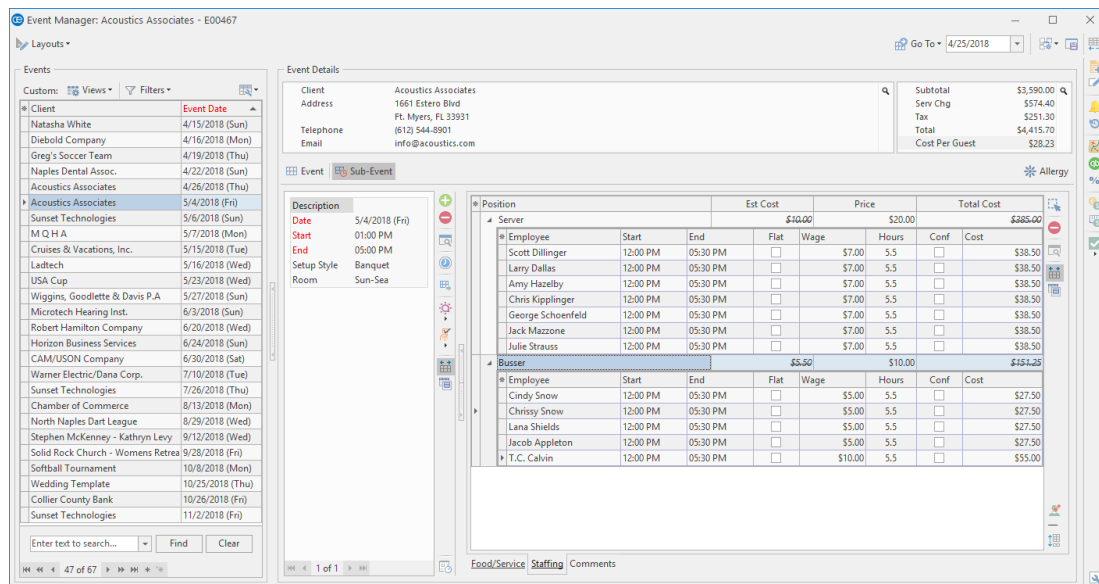
**Result:** A drop-down list of optional columns appears.

**Note:** There are two buttons available, as there are two grids - one for "shifts" and another for "employees."

2. Click into the checkbox next to any column heading to have that column appear in the corresponding grid.

**Result:** Any columns with checks next to them display in the grid.

**Note:** The **Automatically Set Column Widths** button  on the right-hand side of the **Staffing** tab is selected by default, meaning that any selected columns will automatically shrink to fit in this window without the need to scroll horizontally.



3. **[Optional]** Hold your left mouse button down on a column heading in the list and drag up and down to reposition that column in the grid.

**Note:** You can also drag column headings left and right in the grid itself.

4. Enter information into the new fields.

## Fields Available in the Staffing Grids

Field	Description
<b>Position*</b>	Indicates the specific shift or position needed for this sub-event (Waiter, Bartender, etc.).
<b>Start</b>	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.
<b>End</b>	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.
<b>Uniform</b>	Indicates the type of uniform the shift requires; offers a custom quickpick list of choices.
<b>Flat</b>	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.

Field	Description
<b>Base Price</b>	Indicates the base price (prior to any optional markup) for the shift.
<b>Price Markup</b>	Allows you to markup the base price of the shift by a certain percentage to arrive at a price for this specific event.
<b>Est Cost</b>	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.
<b>Price</b>	Indicates the price of the shift for this particular event.
<b>Hours</b>	Adds the hours from the Start time of the shift to its End time.
<b>Required*</b>	Indicates the number of employees required to fill this shift for this event; automatically calculated based on rules you establish (and can be edited).
<b>Total</b>	Calculates the total due from the customer for this shift by multiplying the Price times Hours times the required number of employees.
<b>Total Markup</b>	Calculates the total amount the shift has been marked up by multiplying the Price Markup times Hours times the required number of employees.
<b>Category</b>	Allows you to categorize this shift for future tracking; offers custom quickpick list of options (e.g., "Back of House," "Front of House").
<b>Comments</b>	Offers a drop-down text box for you to enter specific comments pertaining to this shift.
	* Displayed in the Employee grid by default.

The grid within a grid, described below, pertains to the Employees working an event.

Field	Description
<b>Employee*</b>	Identifies the name of the employee.
<b>Start*</b>	Indicates the time the employee will start working; defaults to the Start time of the shift, but can and should be edited when appropriate.
<b>End*</b>	Indicates the time the employee will end working; defaults to the End time of the shift, but can and should be edited when appropriate.
<b>PosNum</b>	Indicates an employee's position number. (This field is auto-assigned by Caterease.)
<b>Uniform</b>	Indicates the type of uniform the employee will wear for this shift.
<b>Flat</b>	Displays a checkbox, indicating whether the employee's wage is a flat wage or hourly (hourly wages are multiplied times hours worked).
<b>Wage</b>	Indicates the hourly wage of the employee; defaults to the wage established in employee setup, but can be edited.
<b>Hours</b>	Adds the hours from the employee's Start time to his End time.
<b>Category</b>	Allows you to categorize the employee for future reference; examples might include "Full Time" or "Part Time."
<b>Conf</b>	Displays a checkbox, indicating whether the employee has confirmed he or she can work the shift.
<b>Cost*</b>	Calculates employee's wage times his total hours worked.
<b>Comments</b>	Offers a drop-down text box for you to enter specific comments pertaining to this employee.
	* Displayed in the Employee grid by default.

## Printing a Staffing Sheet for an Event

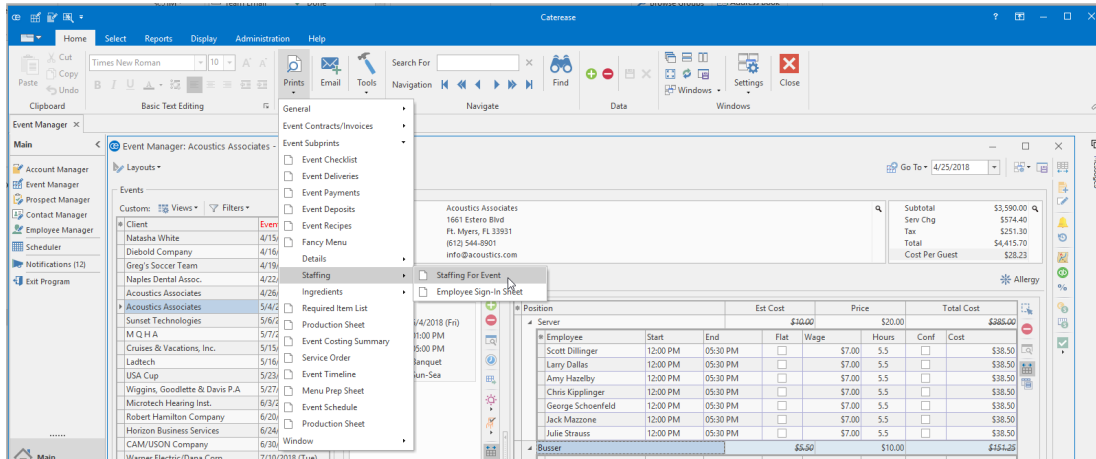
1. With your event open in Event Manager, click the bottom half of the **Prints** button in the **Home** ribbon tab at the top of the screen.

**Result:** A drop-down list of options appears.

**Note:** You can also click the top of the **Prints** button to get a print selection window, and then choose the **Subprints** tab and move on to Step 3, below.

2. Click **Event Subprints**.

**Result:** Another drill-down list appears.



3. Choose **Staffing > Staffing for Event** or **Staffing > Employee Sign-In Sheet**.

**Result:** A preview window for the print appears.

**Note:** These prints (and other miscellaneous event sub-prints) can be customized using the Miscellaneous Prints Designer .


4. Click the **Print** button at the top of the print preview screen to send the print to a printer.

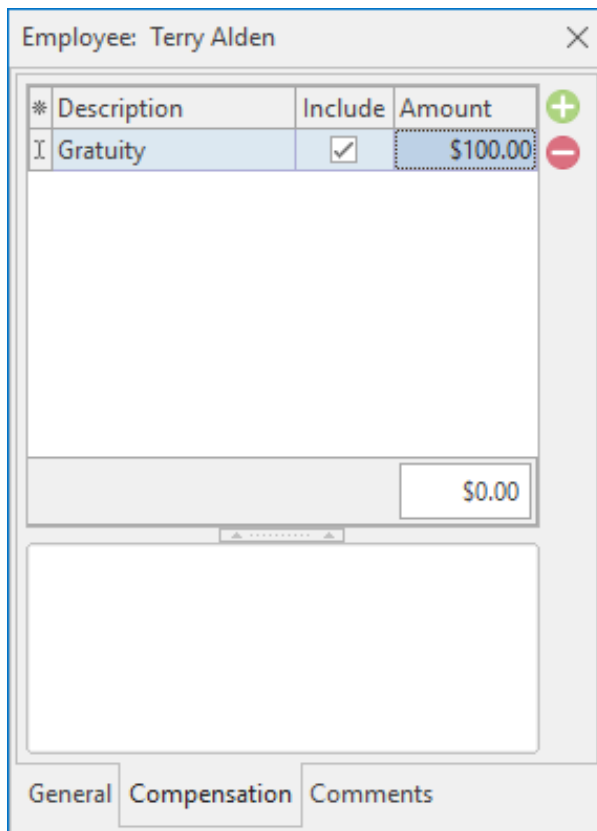
**Tip:** You can also generate a staffing reports for an entire day or date range by clicking the **Reports** ribbon tab at the top of the screen and choosing **Management > Employee Staffing** or **Management > Scheduled Shifts**.

## Adding Additional Employee Compensation

What if you split additional gratuities with your staff? Or what if you offer travel reimbursements to employees? Caterease makes it easy to separate additional compensation 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 , located on the right-hand side of the window.  
**Result:** *The Employee window opens.*
4. Click the **Compensation** tab, located at the bottom of the window.



* Description	Include	Amount
I Gratuity	<input checked="" type="checkbox"/>	\$100.00

\$0.00

General Compensation Comments

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 to the right of the field and select an option 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 , located at the top right-hand side of the window, to close the window and save your changes.

## Unit 4: Managing Multiple Shifts

In this section, you will learn:

- Displaying a Day/Date Range of Shifts
- Batch E-mailing a Confirmation Request
- Confirming Staff for an Event



### 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.

#### 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.

The screenshot shows the Shift Manager application interface. On the left, a table lists shifts with columns: Event #, Position, Date, Start, End, Status, Book, Req, and Conf. The table is filtered to show shifts for the date range 3/1/2018 to 3/31/2018. The total count is 52. On the right, a 'Staff' panel shows a list of employees with checkboxes for selection. The 'Locked' status is indicated at the top of the staff panel.

Event #	Position	Date	Start	End	Status	Book	Req	Conf
E00371	Busser	3/9/2018	04:30 PM	12:00 AM	Definite	1	5	0
E00371	Server	3/9/2018	04:30 PM	12:00 AM	Definite	2	9	0
E00286	Bartender	3/10/2018	09:00 AM	01:30 PM	Definite	1	3	0
E00286	Server	3/10/2018	09:00 AM	01:30 PM	Definite	1	4	0
E00342	Server	3/10/2018	11:00 AM	02:30 PM	Prospective	1	2	0
E00002	Server	3/12/2018	10:30 PM	02:30 PM	Tentative	0	1	0
E00381	Bartender	3/6/2018	04:00 PM	10:00 PM	Definite	2	4	2
E00381	Server	3/6/2018	04:00 PM	10:00 PM	Definite	8	5	4
E00005	Busser	3/21/2018	10:30 AM	02:00 PM	Tentative	1	1	1
E00005	Server	3/21/2018	08:30 AM	10:15 AM	Tentative	0	1	0
E00329	Bartender	3/10/2018	09:30 AM	03:30 PM	Definite	0	6	0
E00329	Busser	3/10/2018	09:30 AM	03:30 PM	Definite	1	6	1
E00003	Busser	3/26/2018	05:00 PM	09:30 PM	Tentative	1	1	0
E00003	Server	3/26/2018	05:00 PM	09:30 PM	Tentative	1	1	0
E00005	Busser	3/21/2018	05:00 PM	09:30 PM	Tentative	1	1	0
E00005	Server	3/21/2018	03:00 PM	04:45 PM	Tentative	1	1	0
E00356	Busser	3/21/2018	10:00 AM	02:30 PM	Definite	0	8	0
E00356	Server	3/21/2018	10:00 AM	02:30 PM	Definite	11	8	8
E00005	Server	3/21/2018	05:00 PM	09:30 PM	Tentative	1	1	0
E00380	Server	3/31/2018	10:00 AM	03:30 PM	Tentative	0	8	0
E00003	Busser	3/26/2018	10:30 AM	03:00 PM	Tentative	1	1	0

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.

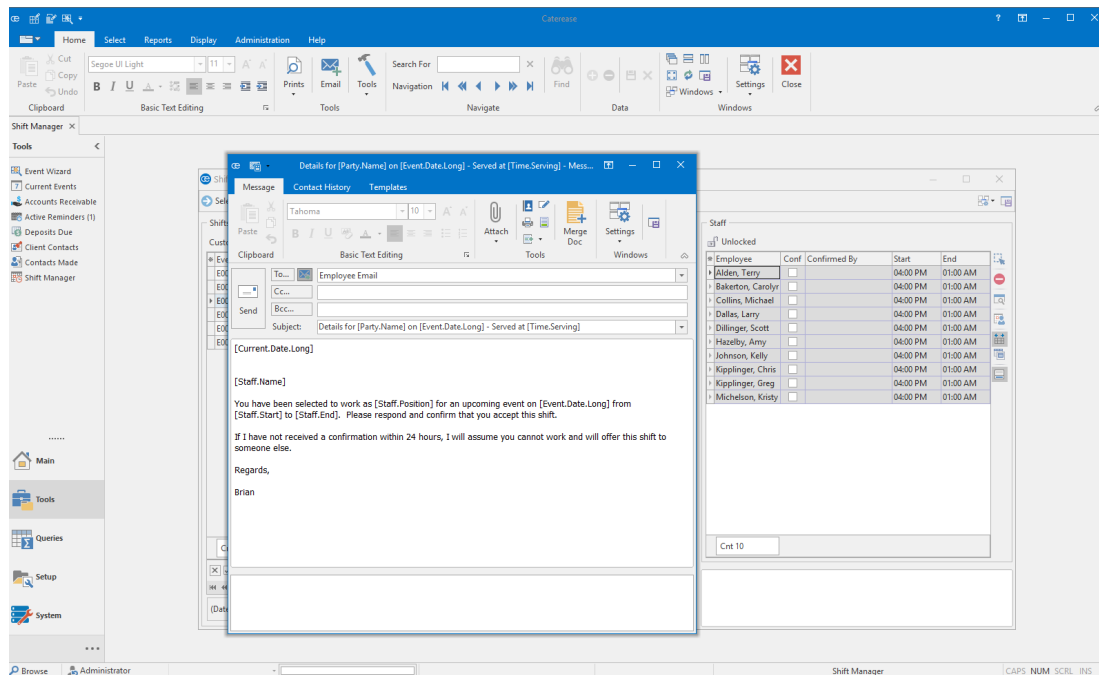
The screenshot shows the Shift Manager application with the 'Date' filter dropdown menu open. The menu options are: (All), (Custom...), Yesterday, Today, Tomorrow, Last 30 days, Last 14 days, Last 7 days, Next 7 days, Next 14 days, Next 30 days, Last two weeks, Last week, This week, and Next week. The 'Date' field in the table is highlighted.

Event #	Position	Date	Start	End	Status	Book	Req	Conf
E00371	Busser		04:30 PM	12:00 AM	Definite	1	5	0
E00371	Server		04:30 PM	12:00 AM	Definite	2	9	0
E00286	Bartender		09:00 AM	01:30 PM	Definite	1	3	0
E00286	Server		09:00 AM	01:30 PM	Definite	1	4	0
E00342	Server		11:00 AM	02:30 PM	Prospective	1	2	0
E00002	Server		10:30 PM	02:30 PM	Tentative	0	1	0
E00381	Bartender		04:00 PM	10:00 PM	Definite	2	4	2
E00381	Server		04:00 PM	10:00 PM	Definite	8	5	4
E00005	Busser		10:30 AM	02:00 PM	Tentative	1	1	1
E00005	Server		08:30 AM	10:15 AM	Tentative	0	1	0
E00329	Bartender		09:30 AM	03:30 PM	Definite	0	6	0
E00329	Busser		09:30 AM	03:30 PM	Definite	1	6	1
E00003	Busser		05:00 PM	09:30 PM	Tentative	1	1	0
E00003	Server		05:00 PM	09:30 PM	Tentative	1	1	0
E00005	Busser	3/21/2018	05:00 PM	09:30 PM	Tentative	1	1	0
E00005	Server	3/21/2018	03:00 PM	04:45 PM	Tentative	1	1	0

## Batch E-mailing a Confirmation Request

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! (This feature is available in the Professional version.)

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 now 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 Untitled Message 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.  
**Note:** *Quickpicks can be set up for the Subject field via **Setup > Quickpicks > General > Email Subject**.*
10. Click into the text box and type the body of the e-mail.  
**Note:** *If you own the Marketing Tools add-in to Caterease, 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 now be confirmed for the event (from the right-hand side of the screen).

7. Click into the **Conf.** (Confirm) checkbox to confirm the employee or employees will work an event.

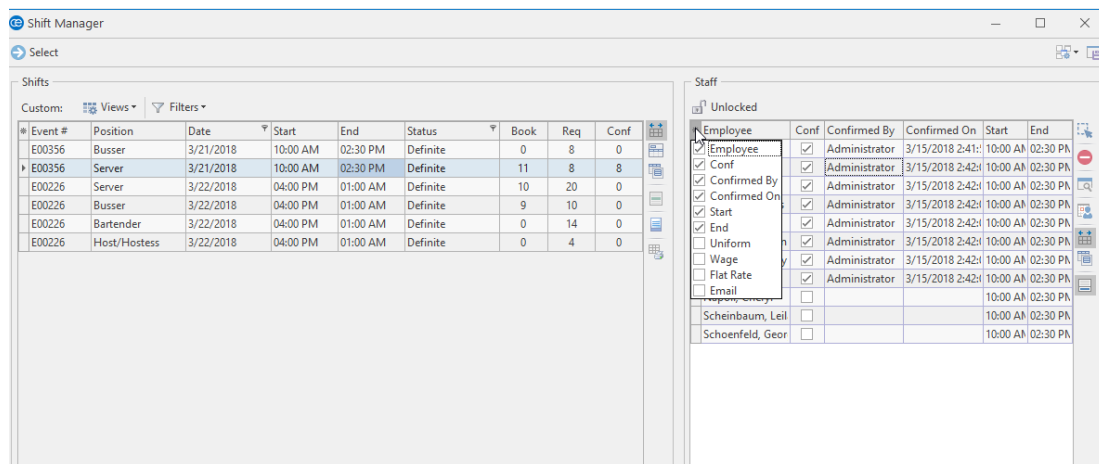
**Note:** Click the **Quick Column Customizing** button  to display additional columns, such as "Confirmed By" and "Confirmed On."

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 window to close the window.



## Unit 5: Tracking Employee Data

In this section, you will learn:

- Viewing Staffing in a Calendar
- Creating Groups of Staffing Calendars
- Printing an Employee Staffing Schedule
- Printing a Scheduled Shifts Report
- Running a Staffing Query



## Unit 5: Tracking Employee Data

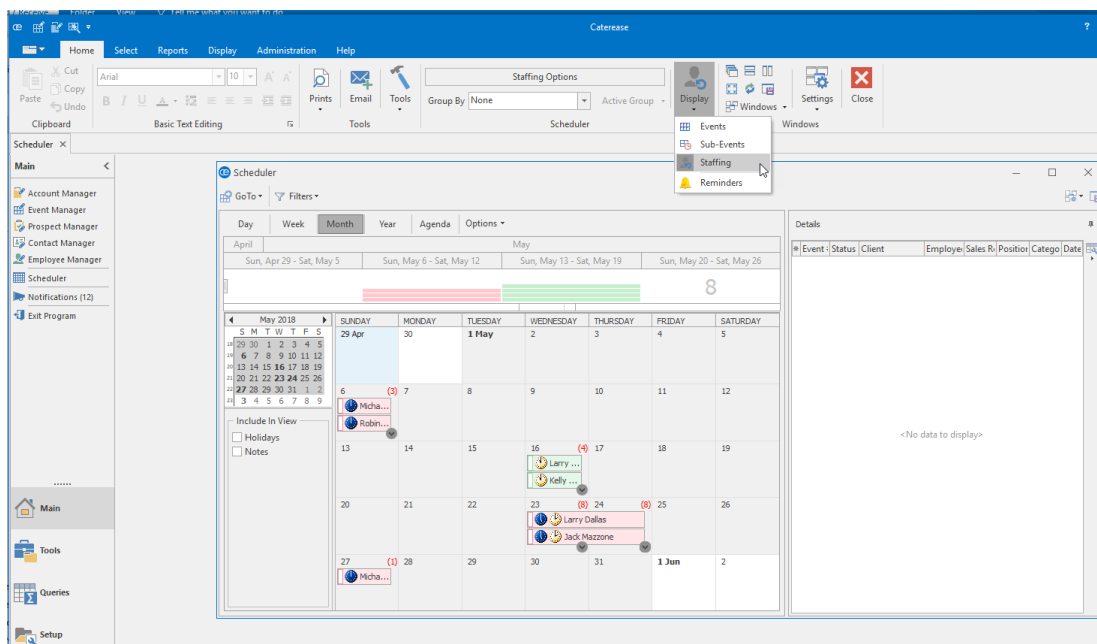
### Tracking Employee Data

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

#### 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

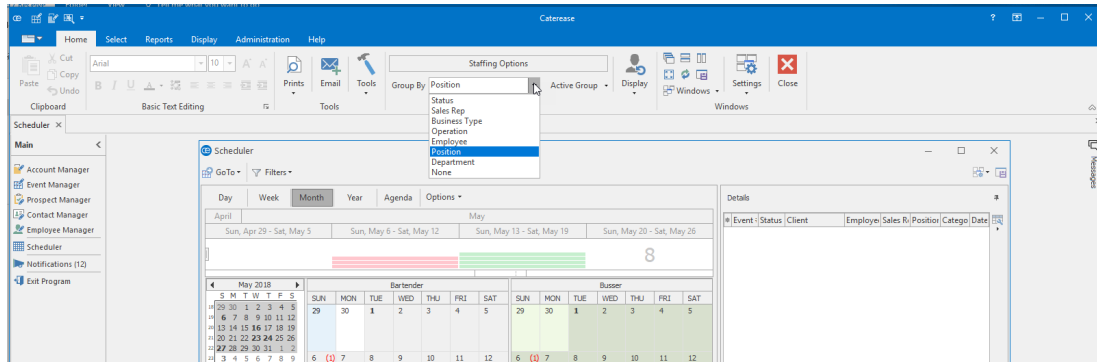
The powerful grouping option in the Scheduler lets you create separate calendars based on a variety of staffing details.

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 allows 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 customize your sort order.*
6. Click into the checkbox to the left of **Legal Size Print** if you would like to print your report on legal-sized paper.
7. **[Optional]** Click into the **Include Site Directions** checkbox if you would like to include the directions to the site location in the report.
8. **[Optional]** Exclude any desired statuses by selecting the status from the **Exclude Status** drop-down list. Choose from among Prospective, Tentative, Definite, Closed, and Canceled.
9. **[Optional]** For an individual employee schedule, click into the **Specific Employee** checkbox, then click the corresponding down arrow to the right of the field and select an employee.
10. Click **OK** to generate the report.  
***Result:** The Employee Staffing Report is generated, incorporating the parameters you established.*

Employee Staffing

Set Parameters

Date Range

☐ Less Than Or Equal To 3/1/2018 thru 3/31/2018

☐ Greater Than Or Equal To

☐ Within Date Range

☒ Relative Date Range This month

Title

Employee Staffing

Options

Report Format

☐ Employee Staffing Schedule

☒ Employee Staffing Schedule (No Wage Details)

☐ Employee Diary

☐ Legal Size Print

☐ Include Site Directions

Sort Order

☒ Employee

☐ Position

☐ Room

☐ Sales Rep

☒ Date

☐ Start

☐ Event #

Exclude Status

Prospective;Closed;Cancelled

☐ Specific Employee

☐ Close After Printing

OK Cancel

**Tip:** Optionally click into the checkbox labeled **Close After Printing** at the bottom left of the window to have this window close automatically as soon as your report has been generated.

## 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.

**Scheduled Shifts**

**Set Parameters**

**Date Range**

☐ Less Than Or Equal To    3/1/2018 thru 3/31/2018  
☐ Greater Than Or Equal To  
☐ Within Date Range  
☒ Relative Date Range    This month

**Title**

Scheduled Shifts

**Options**

Exclude Status

Prospective;Closed;Cancelled

Group By

Date

☒ Specific Shift  
☐ Show Staffing Details  
☐ Suppress Fully Booked & Confirmed Shifts

☐ Close After Printing    **OK**    **Cancel**

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 **Exclude Status** drop-down list. Choose from among Prospective, Tentative, Definite, Closed, and Canceled.

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 click the corresponding down arrow to the right of the field 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 only the shifts that require staffing.
9. Click **OK**.

**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.

### Running a Staffing Query

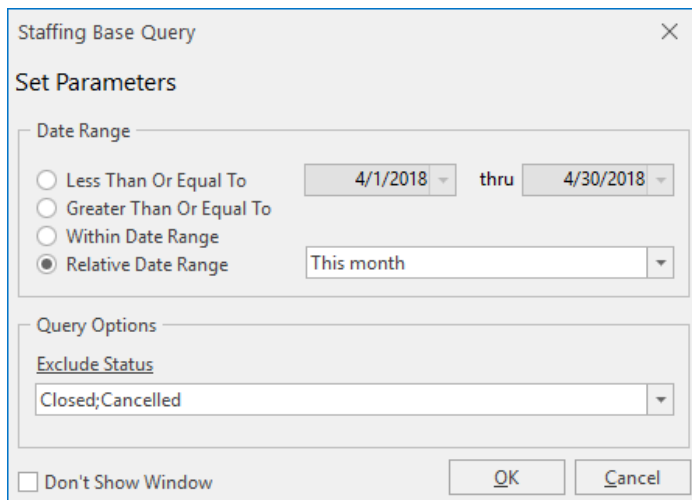
1. Click the **Queries** button from the **Main** Caterease sidebar.
2. Click the **Staffing Query** button on the left-hand side of the screen.

**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 > Sub-Event.

**Tip:** Click into the **Don't Show Window** checkbox if you would like to be taken directly to the results grid. You can modify your base query at any time by clicking the **SQL** button, located on the Staffing Query results screen.



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.  
**Result:** The Staffing Query opens.

Staffing Query

Custom: Views Filters Layout

Chart By Business Type

Filter

Filter AND applies to the main query  
Click here to add a new condition

and (Excluded: Closed, Cancelled) (13 Total Records)

Results

Event #	Date	Client	Status	Sales Rep	Employee	Start	End	Position	Hours	Wage	Cost
E00418	4/16/2018 (Mon)	Diebold Company	Tentative	Jo Ann Mulnix	Dallas, Larry	11:30 AM	03:00 PM	Server	3.5	\$7.00	\$24.50
E00418	4/16/2018 (Mon)	Diebold Company	Tentative	Jo Ann Mulnix	Johnson, Kelly	11:30 AM	03:00 PM	Server	3.5	\$7.00	\$24.50
E00418	4/16/2018 (Mon)	Diebold Company	Tentative	Jo Ann Mulnix	Shaw, Brian	11:30 AM	03:00 PM	Server	3.5	\$7.00	\$24.50
E00418	4/16/2018 (Mon)	Diebold Company	Tentative	Jo Ann Mulnix	Kipplinger, Greg	11:30 AM	03:00 PM	Server	3.5	\$7.00	\$24.50
E00418	4/16/2018 (Mon)	Diebold Company	Tentative	Jo Ann Mulnix	Michelson, Kristy	11:30 AM	03:00 PM	Busser	3.5	\$5.00	\$17.50
E00418	4/16/2018 (Mon)	Diebold Company	Tentative	Jo Ann Mulnix	Shields, Lana	11:30 AM	03:00 PM	Busser	3.5	\$5.00	\$17.50
E00418	4/16/2018 (Mon)	Diebold Company	Tentative	Jo Ann Mulnix	Holder, Robin	11:30 AM	03:00 PM	Busser	3.5	\$5.00	\$17.50
E00391	4/22/2018 (Sun)	Naples Dental Assoc.	Definite	Kathy Wilson	Hazelby, Amy	09:00 AM	01:30 PM	Server	4.5	\$7.00	\$31.50
E00391	4/22/2018 (Sun)	Naples Dental Assoc.	Definite	Kathy Wilson	Kipplinger, Greg	09:00 AM	01:30 PM	Server	4.5	\$7.00	\$31.50
E00391	4/22/2018 (Sun)	Naples Dental Assoc.	Definite	Kathy Wilson	Shaw, Brian	09:00 AM	01:30 PM	Server	4.5	\$7.00	\$31.50
E00391	4/22/2018 (Sun)	Naples Dental Assoc.	Definite	Kathy Wilson	Hazelby, Amy	09:00 AM	01:30 PM	Server	4.5	\$7.00	\$31.50
E00391	4/22/2018 (Sun)	Naples Dental Assoc.	Definite	Kathy Wilson	Mazzone, Jack	10:00 AM	01:30 PM	Bartender	3.5	\$10.00	\$35.00
E00391	4/22/2018 (Sun)	Naples Dental Assoc.	Definite	Kathy Wilson	Kipplinger, George	10:00 AM	01:30 PM	Bartender	3.5	\$10.00	\$35.00

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