Establish Employee Vacation Days

1. From Employee Manager, click the name of the employee whose vacation days you would like to set.
2. Click the **Tools** button at the top of your screen and choose **Employee Vacations**.
3. Click and hold the left mouse button down on the vacation start date, drag the mouse to the end date, then release the mouse button
4. Click the **Set Selected Dates** button and click either the Off All Day radio button or the Between Times radio button. (If choosing Between Times, enter the From and To times.)
5. When finished, click **OK**.
   Note: To clear vacation days, select the vacation dates you would like to remove and click the **Clear Selected Dates** button or clear all vacation dates by clicking the **Clear All Calendar Vacation Days** button .

   See Establishing Employee Vacation Days

Add Event Staffing

1. From a Sub-Event in Event Manager, click the **Staffing** tab, located at the bottom of your screen.
2. Click the **Select Staff** button .
3. Click the Shift name on the left-hand side of the window to select the shift/position, then select the corresponding staff member from the right-hand side of your screen.
4. Click **OK**.

   See Managing Staff for an Event

View Staffing in the Calendar (Scheduler)

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

   See Viewing Staffing in a Calendar

Additional Resources

Viewing Employees by Position
Generating the Employee Staffing Report
Viewing Employees by Day of the Week
Showing an Employee's Scheduled Events
Adding Additional Employee Compensation
Making an Employee Inactive
Creating Employee Manager Quickpick Lists

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Quick Reference Guide:

Employee Manager

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Add Employees

1. Click the **Employee Manager** button from the **Main** sidebar.
2. Click the **Add Record** button ⊕.
3. Click **Yes** at the confirmation message.
4. Type the employee's last name into the <u>Last</u> field, and press **[Tab]** or **[Enter]** to move to the next field.
5. Fill out the remaining **General** tab fields by typing directly into the fields or by selecting options from custom quickpick lists. Type directly into the **Notes**, **Skills**, and **Emergency** text blocks.
6. Click the **Address** tab and complete the <u>Home Address</u> and <u>Mailing Address</u> fields. (Supply Mailing Address if different from the Home Address.)
7. When finished, click the Sav**e Changes** button 🖫.
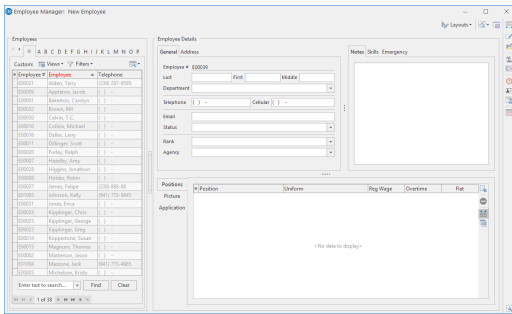
See [Creating a Default List of Employees](#)

Add Employee-Related Files

1. From Employee Manager, click the **Tools** button at the top of your screen and choose **Related Files**.
2. Click the **Add File** button ⊕.
3. Choose to embed the existing file into the database or establish a link to the existing file by clicking the appropriate radio button.
   Note: Embedding the file into the database copies the file in its current form and attaches it as a permanent record, whereas establishing a link to a file will connect this file to a file on your computer or network.
4. Click **Yes** at the confirmation prompt.
5. Browse your way to the file you want to associate with this employee, then select it by double-clicking.
6. Optionally enter a **Comment** to describe the file or its relationship to the employee.

See [Adding Employee Related Files](#)

Create a Position (Shift)

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

See [Creating Default Shifts or Positions](#)

Establish Shift Rules

1. From Employee Manager, click the **Tools** button at the top of your screen and choose **Shift Setup**.
2. Click a position in the grid (in the pane on the left).
3. Click the **Add Rule** button ⊕, located on the lower right-hand side of the Shift Wizard Setup window, in the **Wizard Rules** section.
4. Click the down arrow in the field beneath "Create a new Wizard Rule that applies to…" and select the desired options.
5. In the "Rule for…" section, type the number of guests to add for every shift.
6. Optionally click into the checkbox under **Options** to round the shift count up, if needed.
7. Optionally type a shift rule comment into the **Comments** text box.
8. Click **OK** to close the Shift Wizard Rules window.
9. Click the **Save Changes** button 🖫, located in the Shift Wizard Setup window.
10. Click **Close** to close the Shift Wizard Setup window.

See [Establishing Shift Rules](#)

Assign a Position to the Employee

1. Click the **Select Positions for Employee** button 🖱, located on the right-hand side of the **Positions** grid.
2. Select one or more positions from the Select Position window.
3. Close the window by clicking the X at the top right.
4. Fil out additional information, such as Uniform and Wage information (if you did not set defaults.)
5. Click the **Save Changes** button 🖫.

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

Set an Employee Work Schedule

1. From Employee Manager, click the name of the employee whose work times you would like to set.
2. Click the **Tools** button at the top of your screen and choose **Work Times**.
3. Click into a **Weekdays** checkbox and select either the <u>All Day</u> or <u>Within Times</u> radio button.
   Note: If Within Times is selected, type <u>From</u> and <u>To</u> times into their respective fields.
4. Continue establishing days/times the employee is *unable* to work, as described in Step 3.
5. Click **OK**.
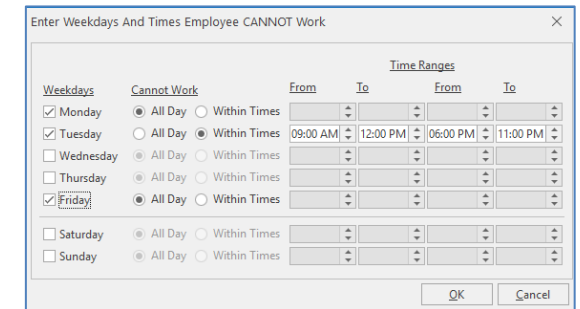
See [Setting a Defined Employee Work Schedule](#)