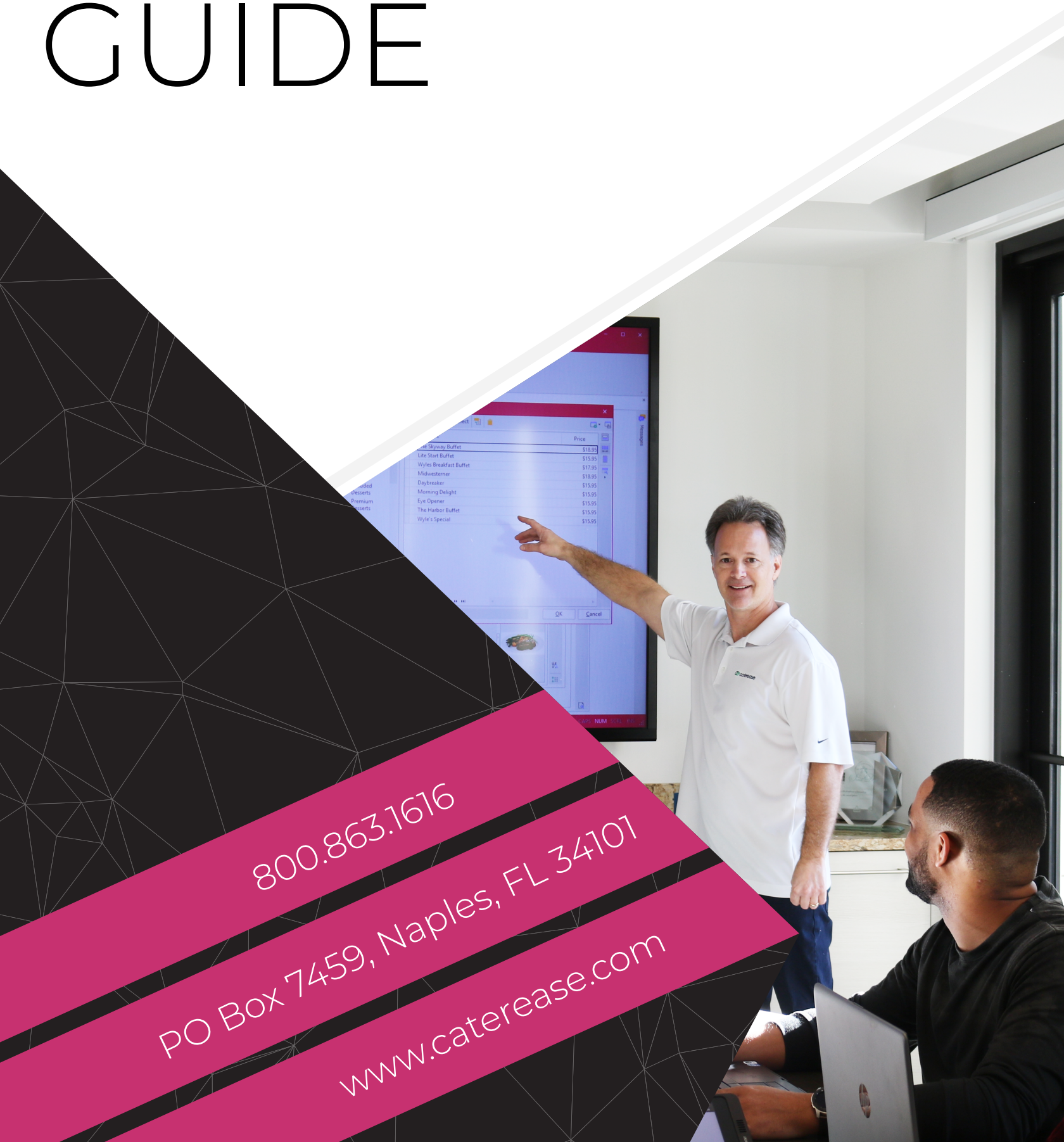
CATEREASE

TRAINING GUIDE



800.863.1616

PO Box 7459, Naples, FL 34101

www.caterease.com

Managing Your Staff in Employee Manager

© Copyright 2018

TABLE OF CONTENTS

Unit 1: Creating Employee Manager Defaults **5**

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

Unit 2: Managing Your Default List of Employees **17**

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

Unit 3: Managing Your Event Staff **32**

Fields Available in the Staffing Grids 37

Adding Additional Employee Compensation 40

Unit 4: Managing Multiple Shifts **42**

Batch E-mailing a Confirmation Request 44

Confirming Staff for an Event 46

Unit 5: Tracking Employee Data **47**

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.

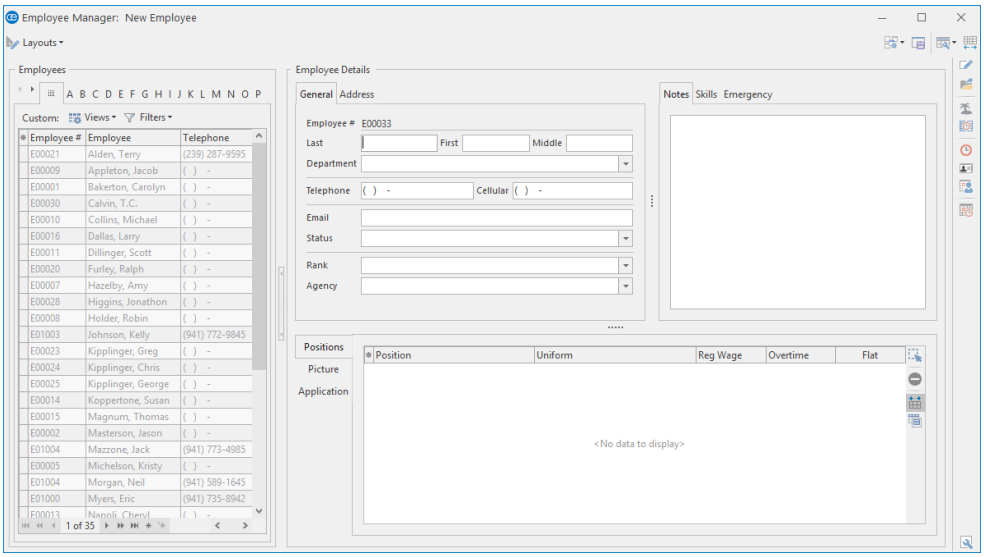
Adding Employees

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.*



5. Type the employee's last name into the Last field.

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

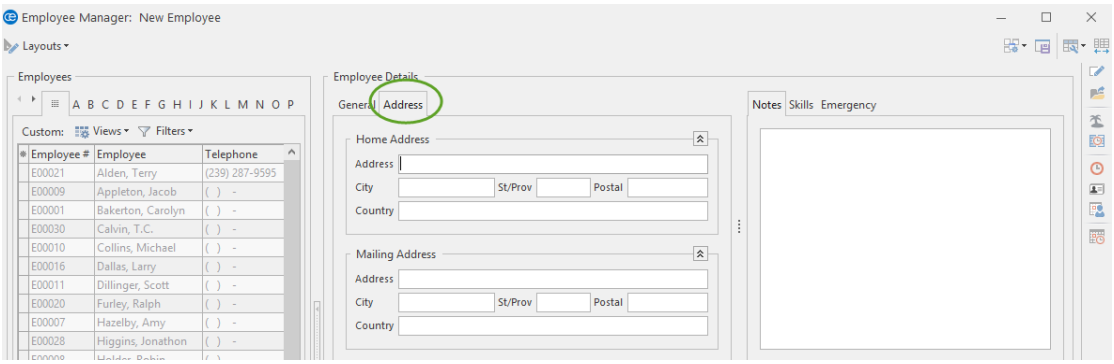
7. Type the employee's first name into the First field.

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.



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.*

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

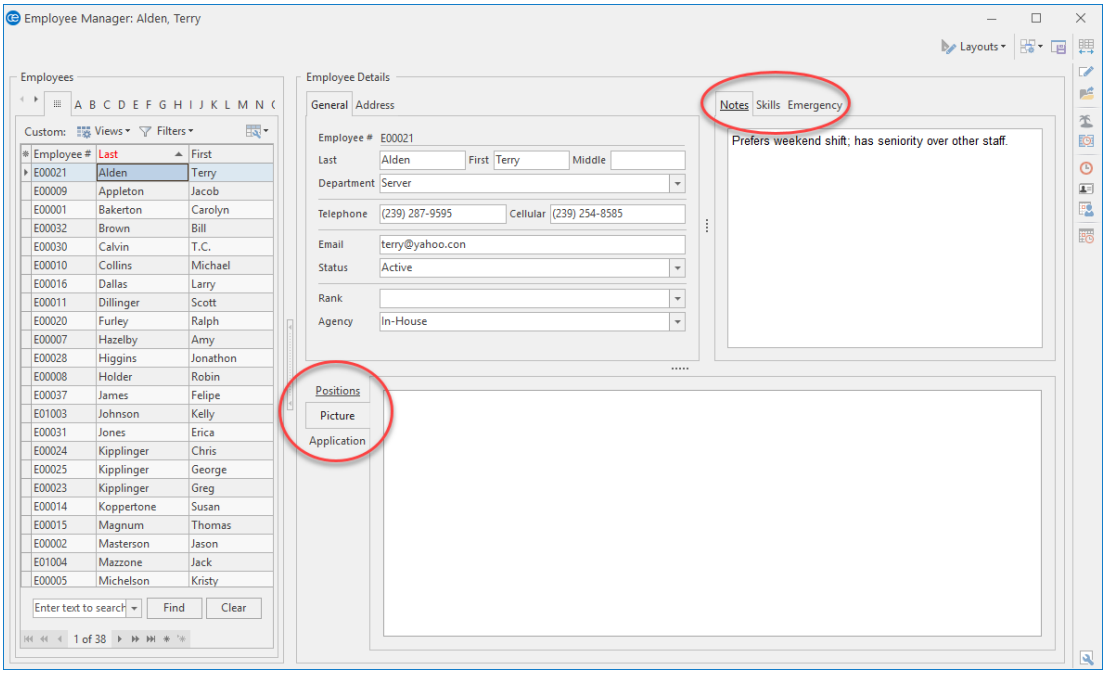
2. **[Optional]** Click the **Skills** tab, located to the right of the **Notes** tab, at the top of your screen.

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.*



Adding Employee Related Files

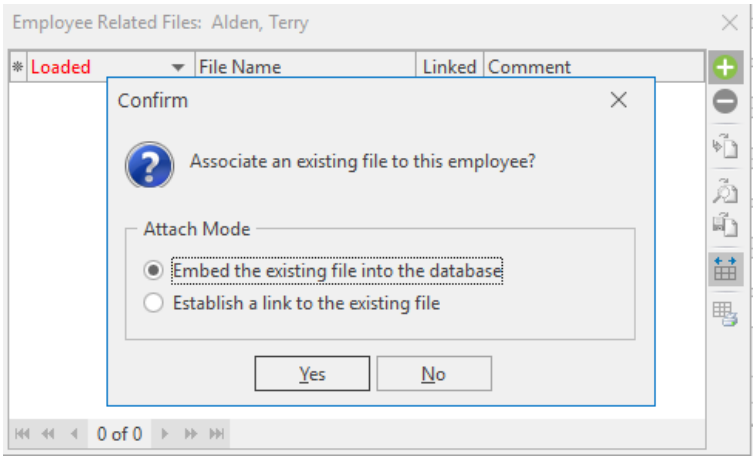
If you have any computer files (Word documents, Excel spreadsheets, PDF files, etc.), that are somehow related to an employee, you can associate those files to the employee via the Employee Manager module. You can choose to embed a copy of each file into the Caterease database or, if you plan to make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

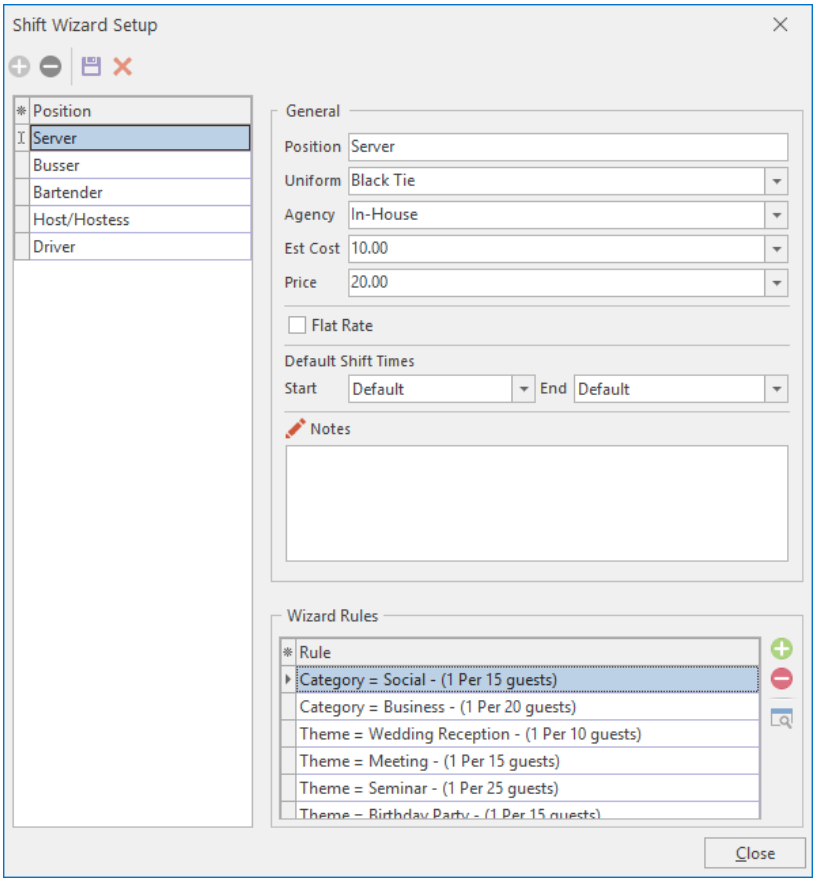
13. **[Optional]** Set the **Default Shift Times** by selecting the desired options from the drop-down lists.
Note: *The* ***Default Shift Times*** *are set to the Start and End times associated with the sub-event.*

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.



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.*

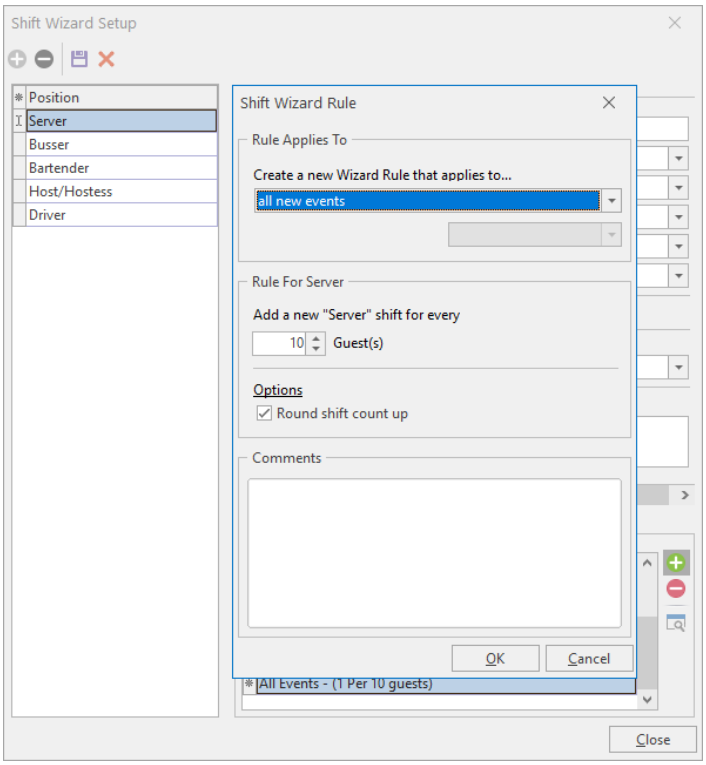
6. Click the down arrow in the first field beneath **Create a new Wizard Rule that applies to**...
   - all new events *(Select this option to apply the shift rule to all events.)*
   - events with a theme of
   - events with a category of

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**.

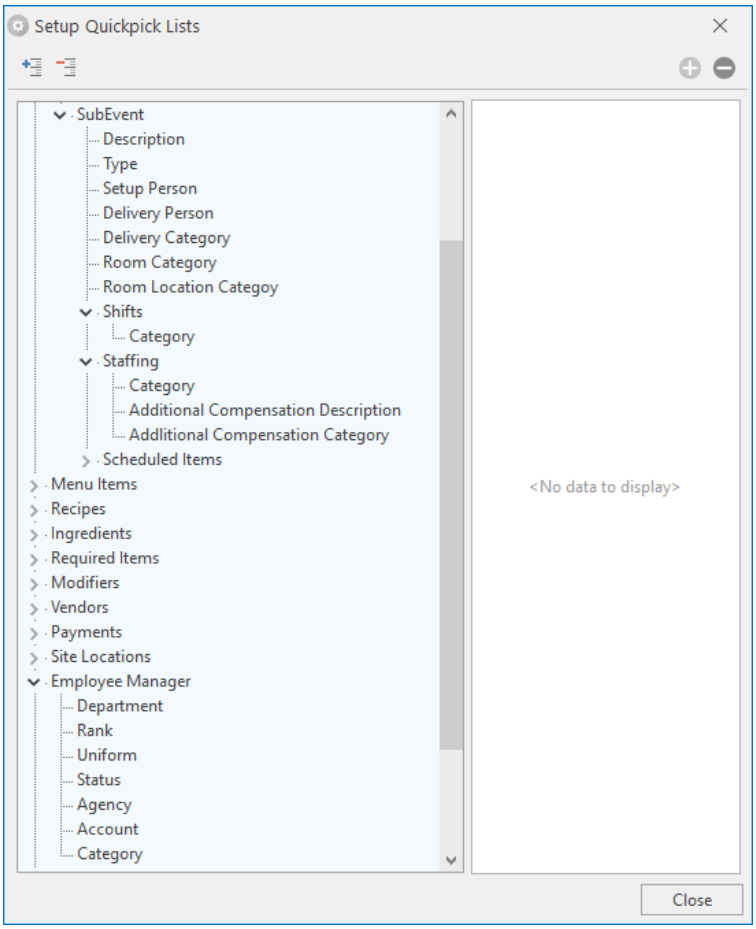
6. Click the **Add New Item** button , located on the upper right-hand side of the window.
   Result: *A blank line is added to the bottom of the list.*

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)

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.*

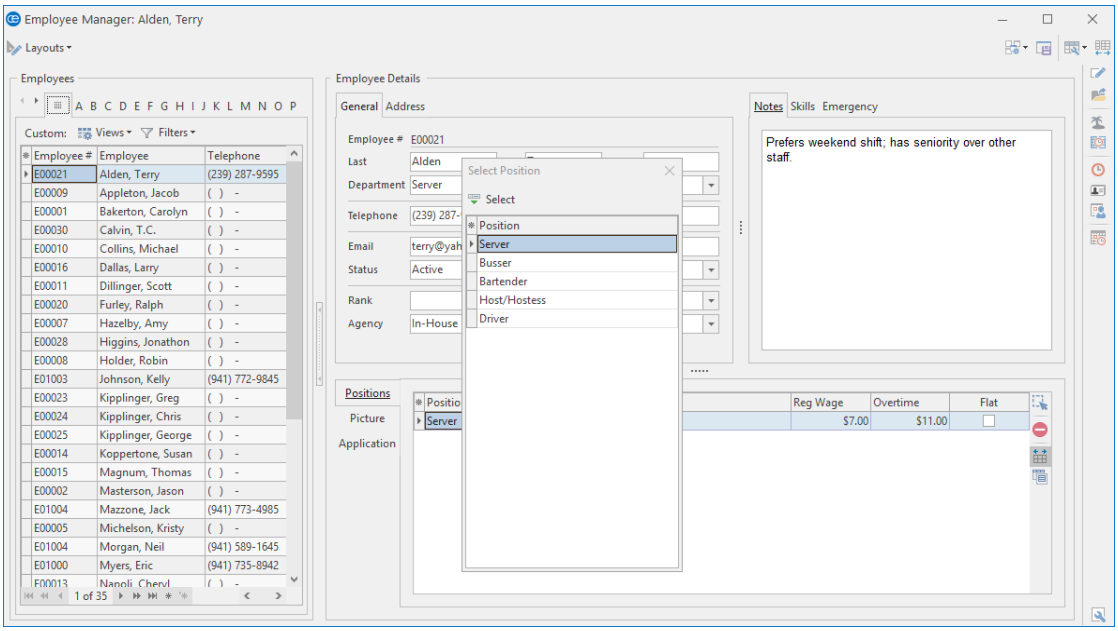
6. Press **[Tab]** or **[Enter]** to move to the next field.

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.


Employee Manager: Alden, Terry
Layouts
Employees
A B C D E F G H I J K L M N O P
Custom: Views Filters
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
1 of 35
Employee Details
General Address
Employee # E00021
Last Alden
Department Server
Telephone (239) 287-
Email terry@yah
Status Active
Rank
Agency In-House
Notes Skills Emergency
Prefers weekend shift; has seniority over other staff.
Positions
Picture
Application
Select Position
Select
Position
Server
Busser
Bartender
Host/Hostess
Driver
Reg Wage Overtime Flat
$7.00 $11.00

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

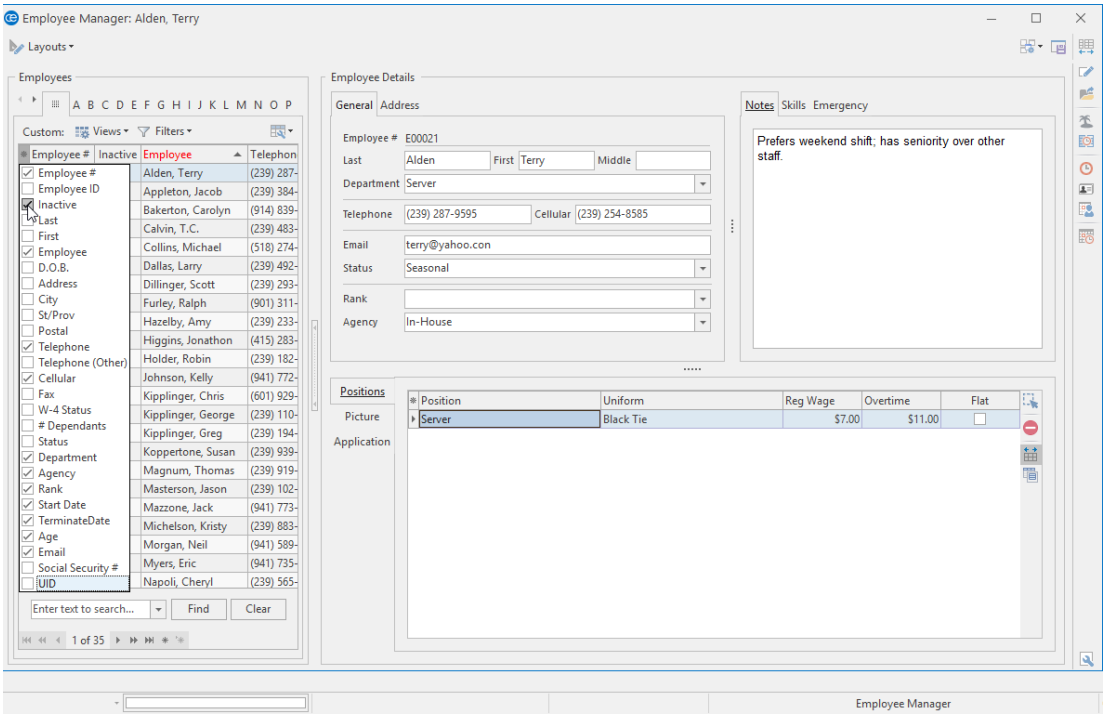
1. Click the **Employee Manager** button, located in the **Main** sidebar group on the left-hand side of your screen.

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.*

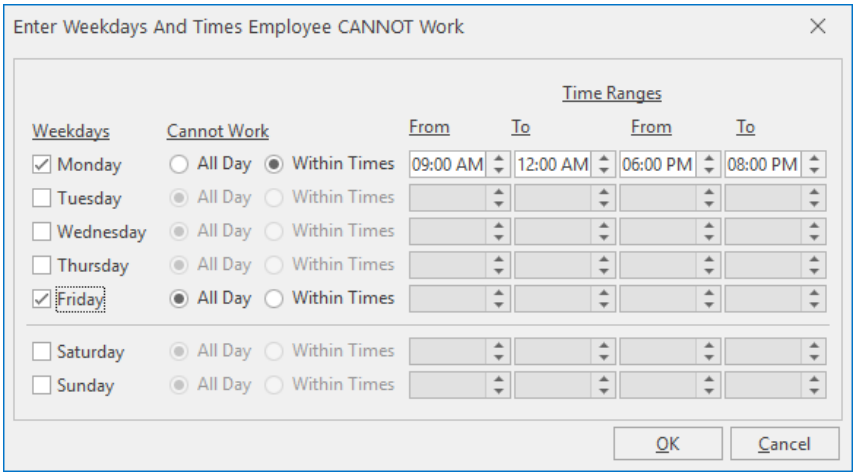
3. Click into a **Weekdays** checkbox.

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.



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.

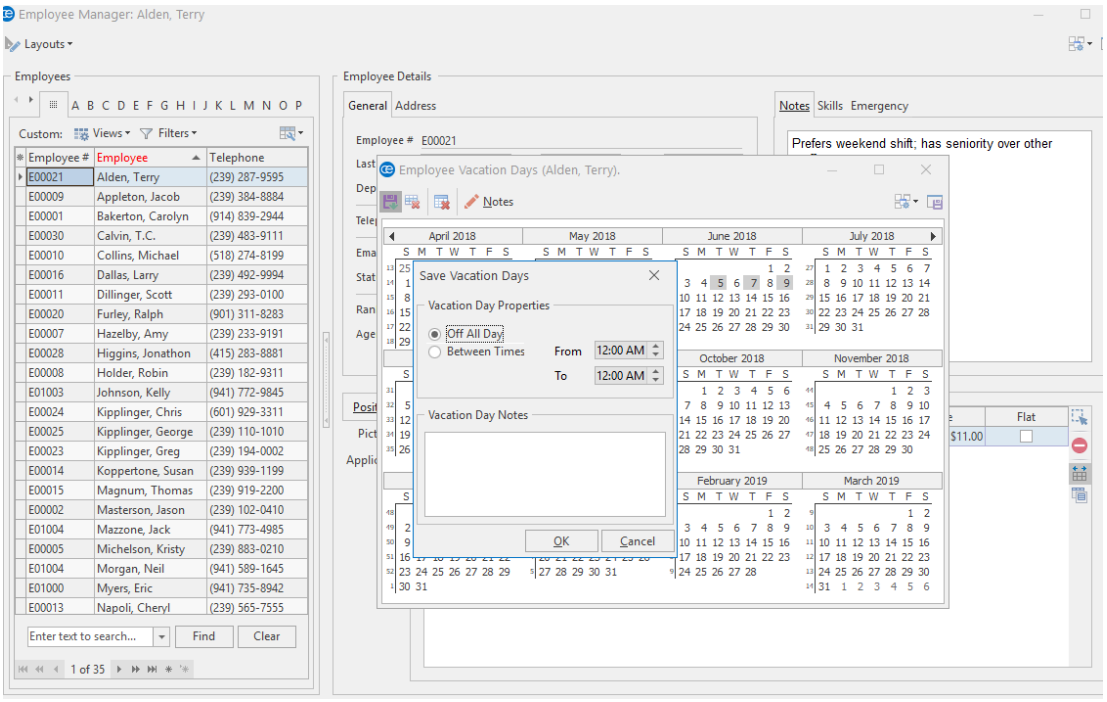
5. Click the **Set Selected Dates** button , located on the upper left-hand side of the window.
   Result: *The Save Vacation Days window opens.*

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
A B C D E F G H I J K L M N O P
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 Kipplinger, Chris (601) 929-3311
E00025 Kipplinger, George (239) 110-1010
E00023 Kipplinger, 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
Employee # E00021
Notes Skills Emergency
Prefers weekend shift; has seniority over other
Employee Vacation Days (Alden, Terry).
Notes
April 2018
May 2018
June 2018
July 2018
Save Vacation Days
Vacation Day Properties
Off All Day
Between Times
From 12:00 AM
To 12:00 AM
Vacation Day Notes
OK Cancel
October 2018
November 2018
February 2019
March 2019
Flat
$11.00

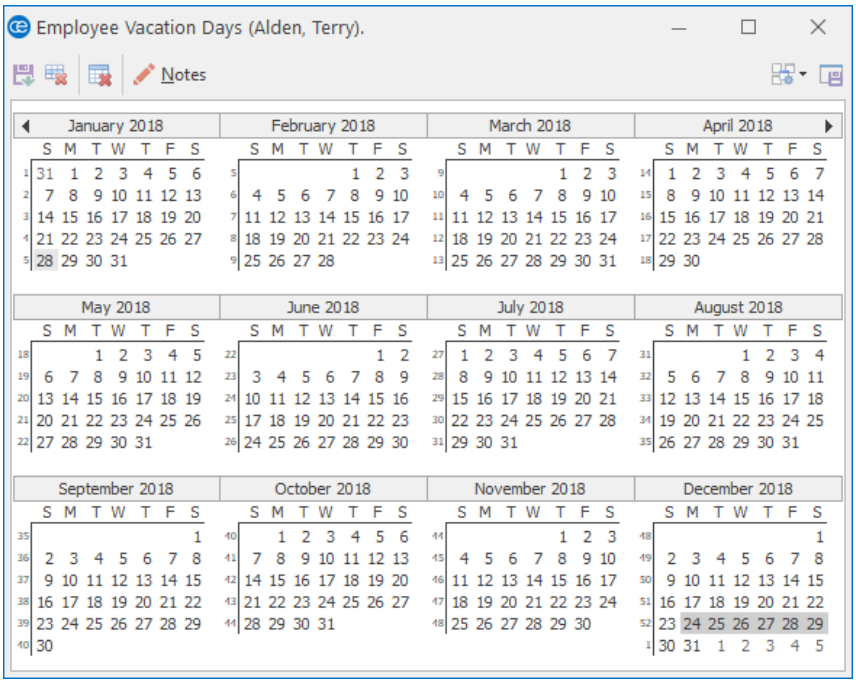
Establishing Employee Vacation Days

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.

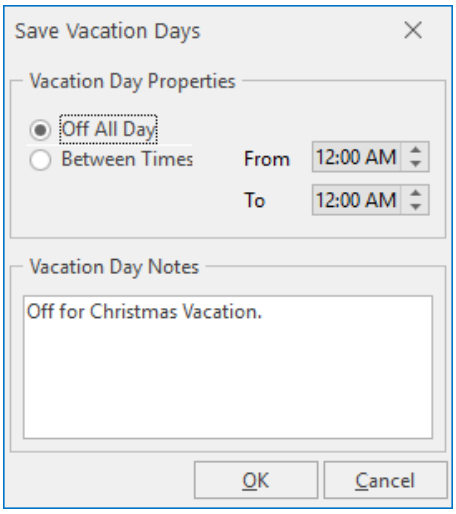
2. Click the **Tools** button, located in the **Home** ribbon tab at the top of your Employee Manager screen, and select **Employee Vacations**, or click the **Employee Vacations** button from the toolbar on the right-hand side of your screen, depending upon your personal configuration.
   Result: *The 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.*



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.

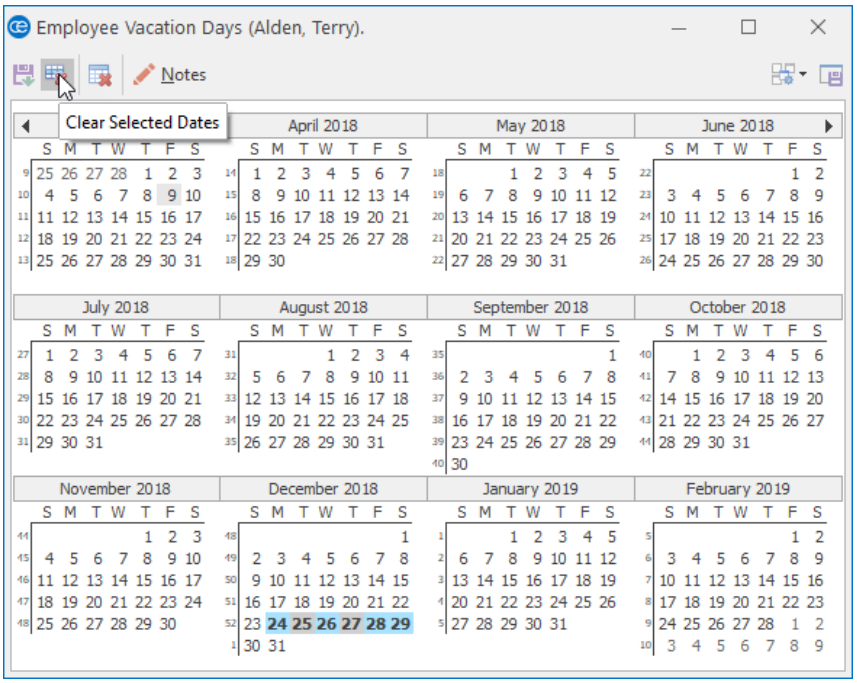
8. When finished, click **OK**.

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.

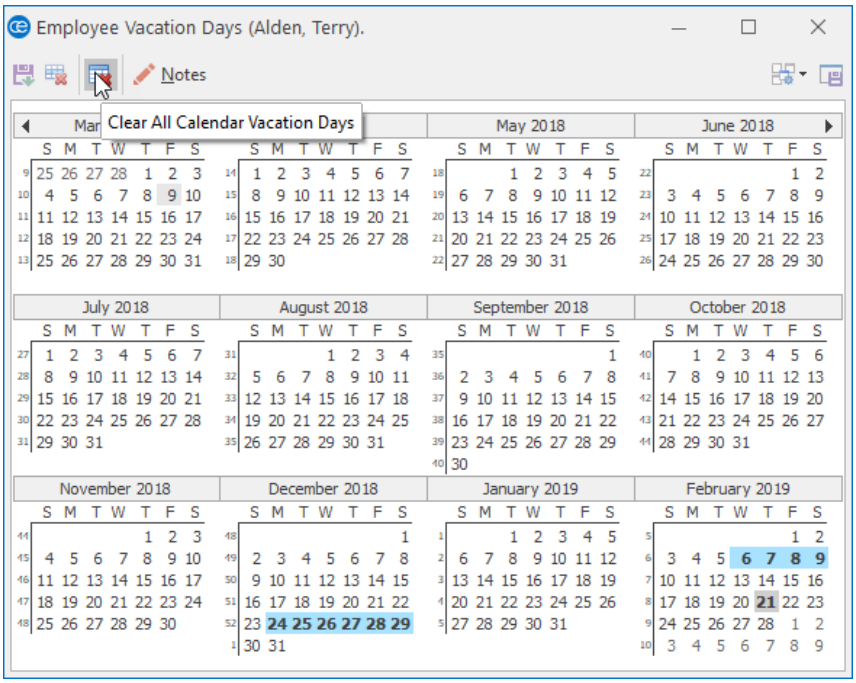
5. Click the **Clear Selected Dates** button .
   Note: *To remove only one vacation day, click on the desired day you would like to clear, and click the* ***Clear Selected Dates*** *button* .

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.*

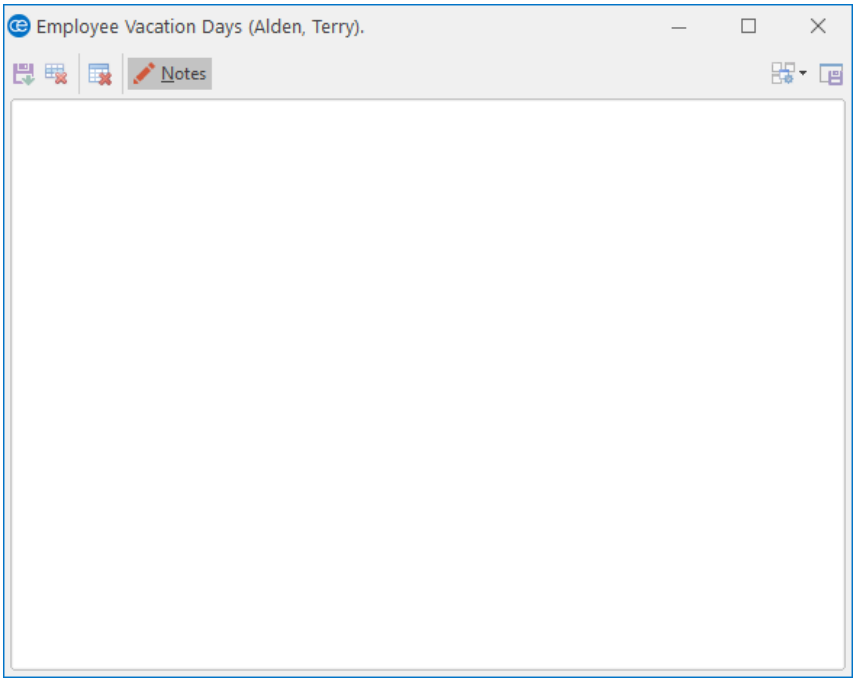
4. Click **Yes** to confirm your choice.

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.*

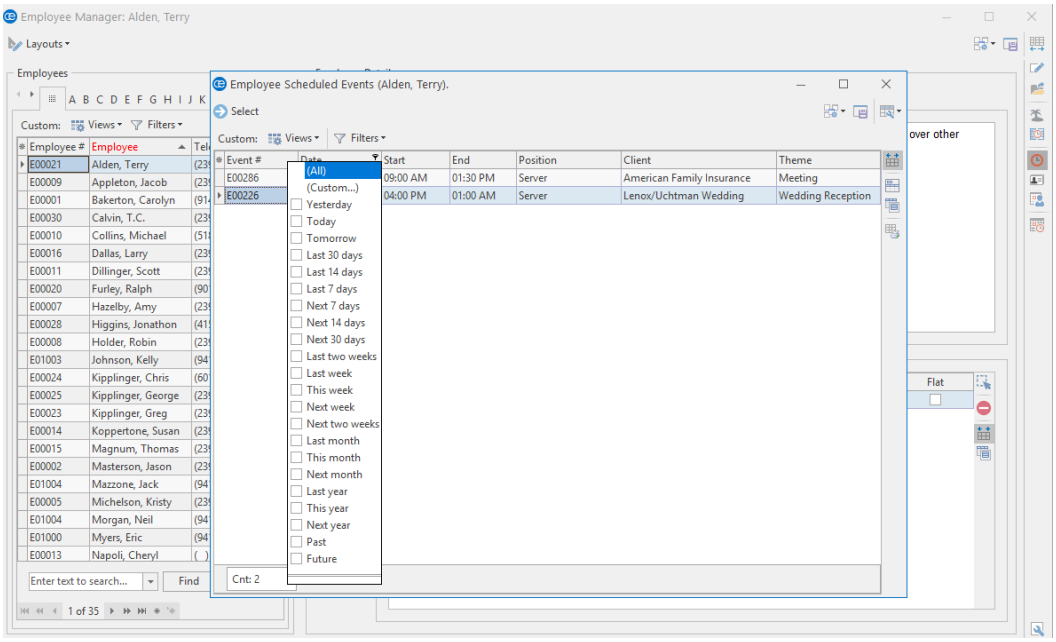
4. Click the funnel icon , select a relative date, and click into the corresponding checkbox.

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.)*

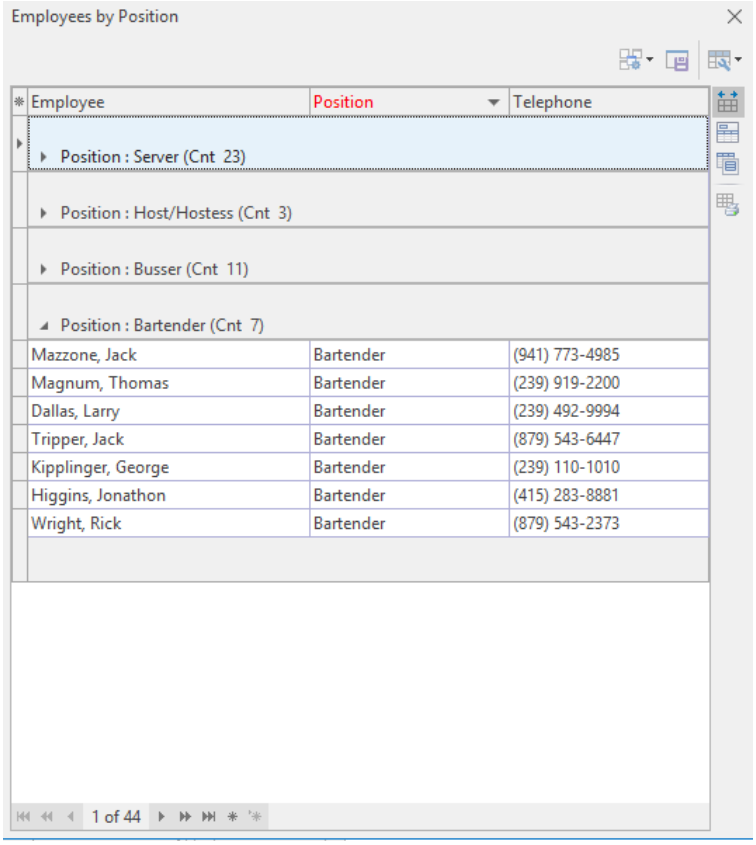


Viewing Employees by Position

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.*



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 lay-out to serve as your default view.*

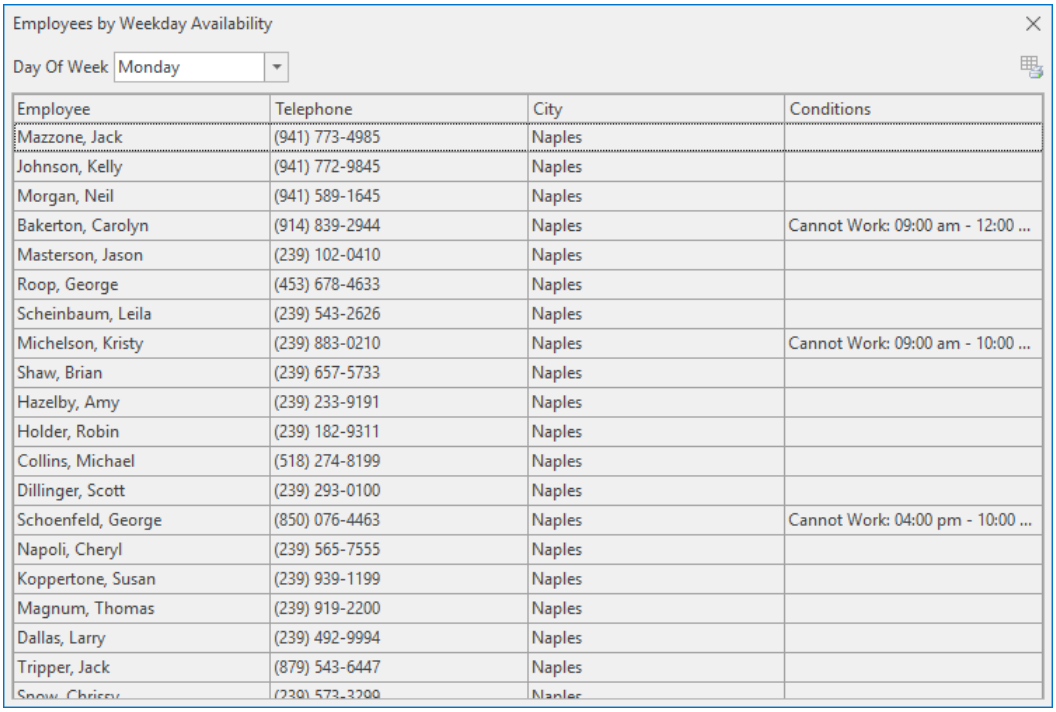
Viewing Employees by Day of the Week

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)

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

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.*



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, Chrissy	(239) 573-3299	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

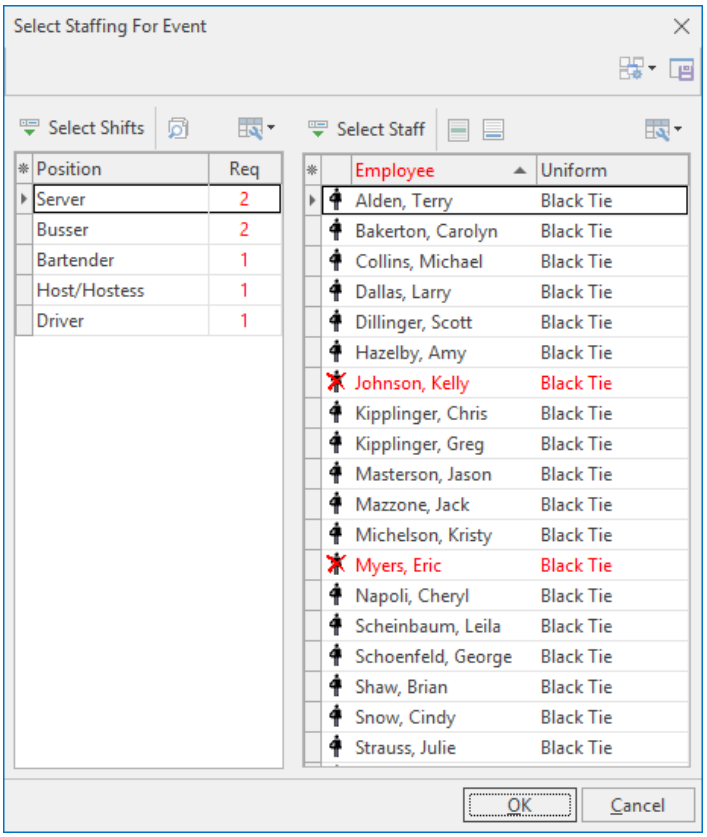
Tip: *In addition to (or instead of) tracking specific employees, you can also simply keep track of "shifts" for an event (how many unnamed "waiters" or "bartenders" the party will require).*

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.*



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*** *button* *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

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.*

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.

Viewing Shift Cost Estimates

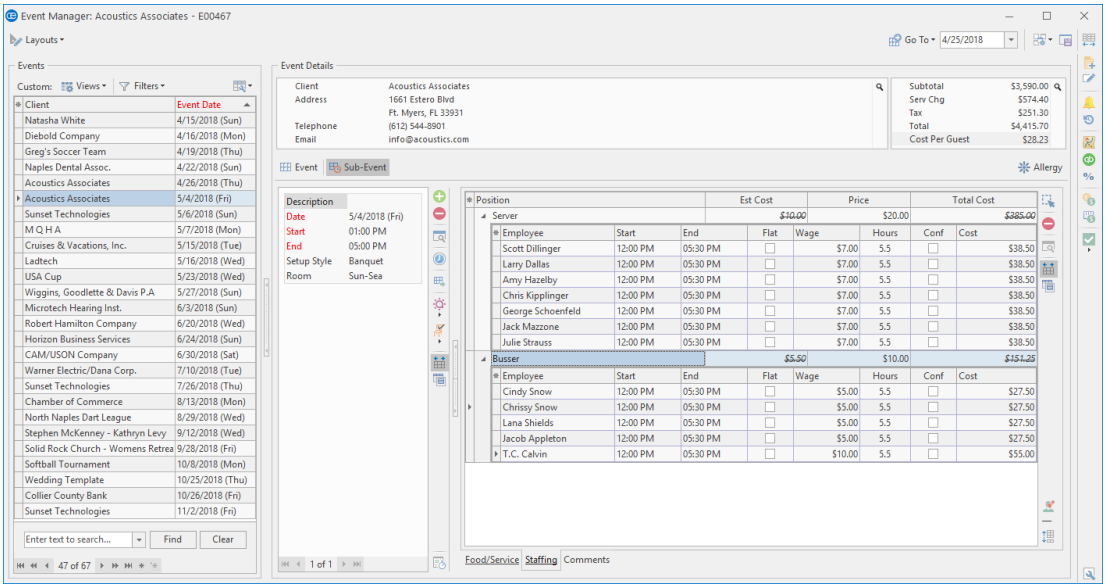
> ***Tip:****If you want the Estimated Cost column (and other columns you have added to the grid) to be displayed as a default, click the* ***Save Current Window Settings*** *button at the top right-hand side of the Event Manager window.*

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.*



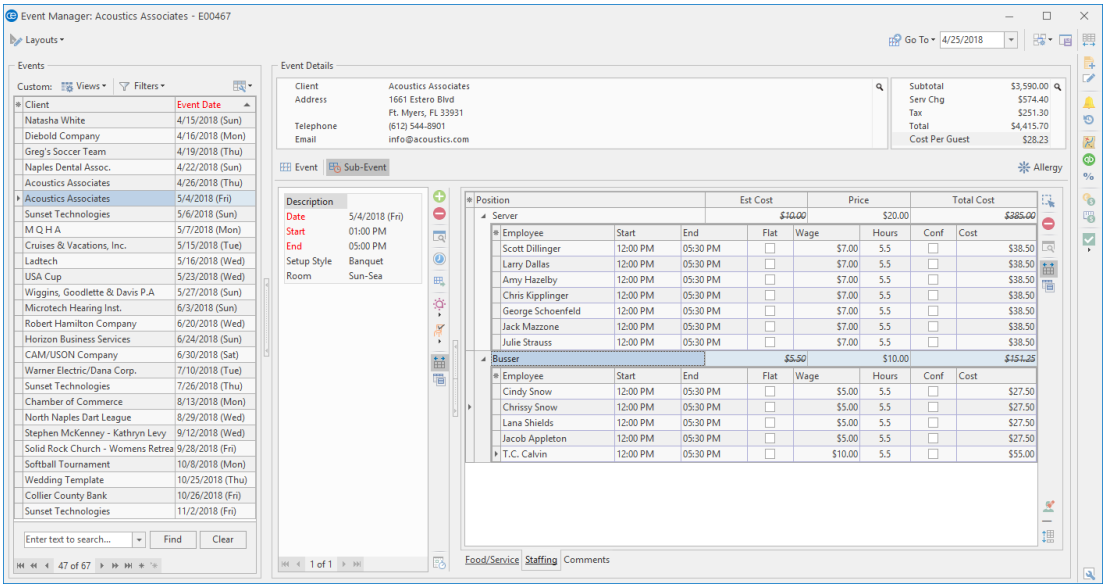
Customizing the Shift and Employee Grids

> ***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
Position*	Indicates the specific shift or position needed for this sub-event (Waiter, Bartender, 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.

Field	Description
Base Price	Indicates the base price (prior to any optional markup) for the shift.
Price Markup	Allows you to markup 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 reflectedby a strike-through line inEstimated CostandTotal 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.
Required*	Indicates the number of employees required to fill this shift for this event; automatically calculated based on rules you establish (and can be edited).
Total	Calculates the total due from the customer for this shift by multiplying the Price times Hours times 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 Employee grid by default.*

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

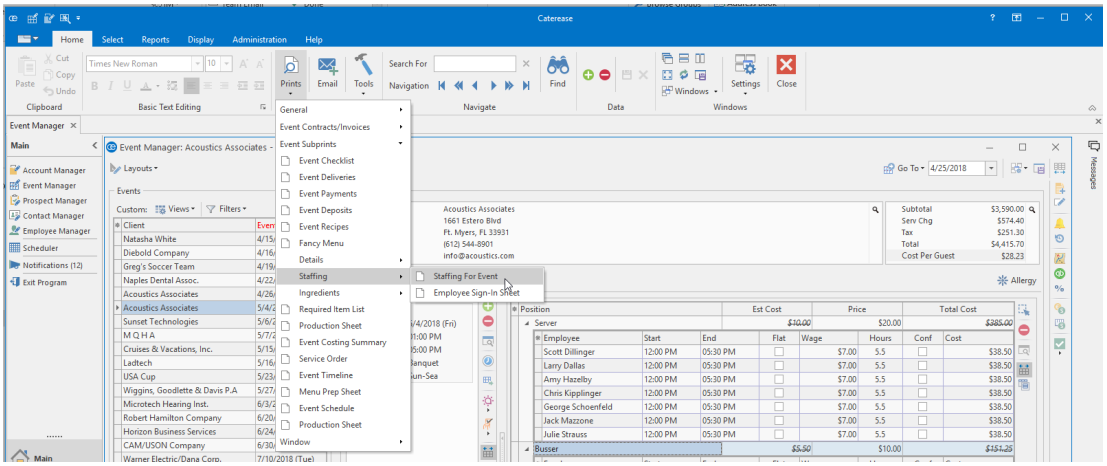
Field	Description
Employee*	Identifies the name of the employee.
Start*	Indicates the time the employee will start working; defaults to the Start time of the shift, but can and should be edited when appropriate.
End*	Indicates the time the employee will end working; defaults to the End time of the shift, 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 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."
Conf	Displays a checkbox, indicating whether the employee has confirmed he or she can work the shift.
Cost*	Calculates employee's wage times his total hours worked.
Comments	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.

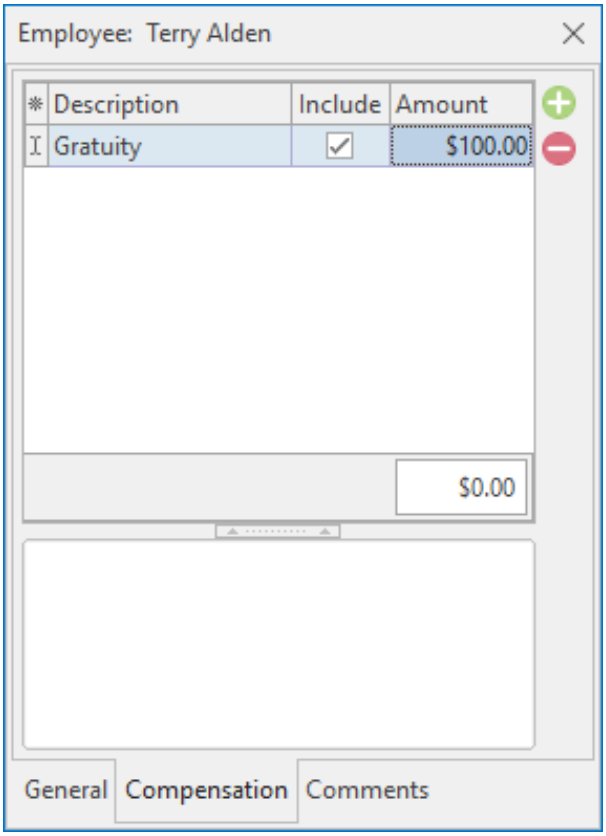
Adding Additional Employee Compensation

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.*



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

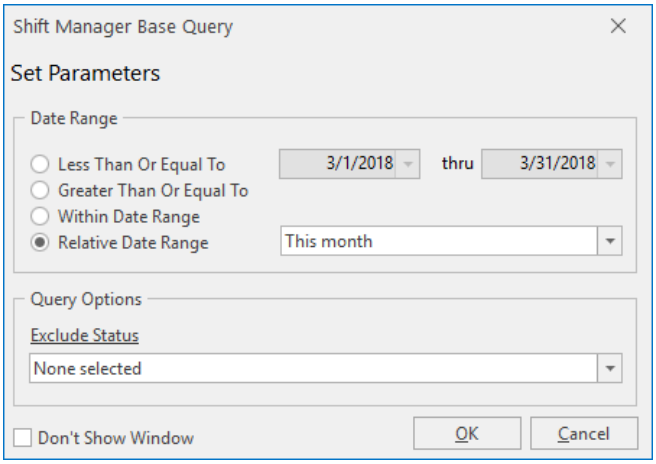
Managing Multiple Shifts

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.

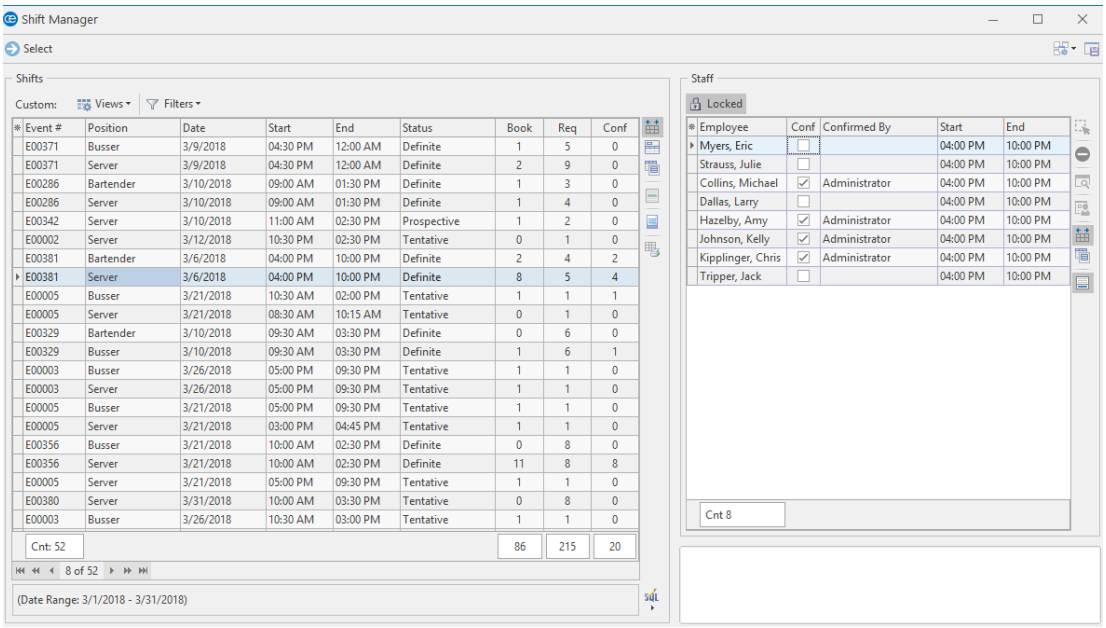
2. Click the **Shift Manager** button.
   Result: *The Shift Manager Base Query window opens.*



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.

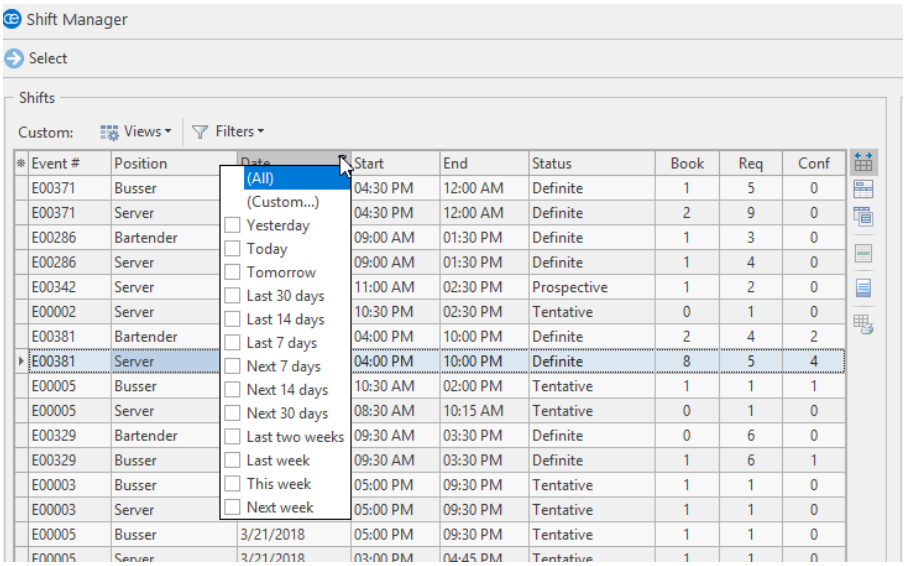
4. **[Optional]** Click the down arrow to the right of the Exclude Status field and select any event statuses you would like excluded from your query.

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



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

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.*

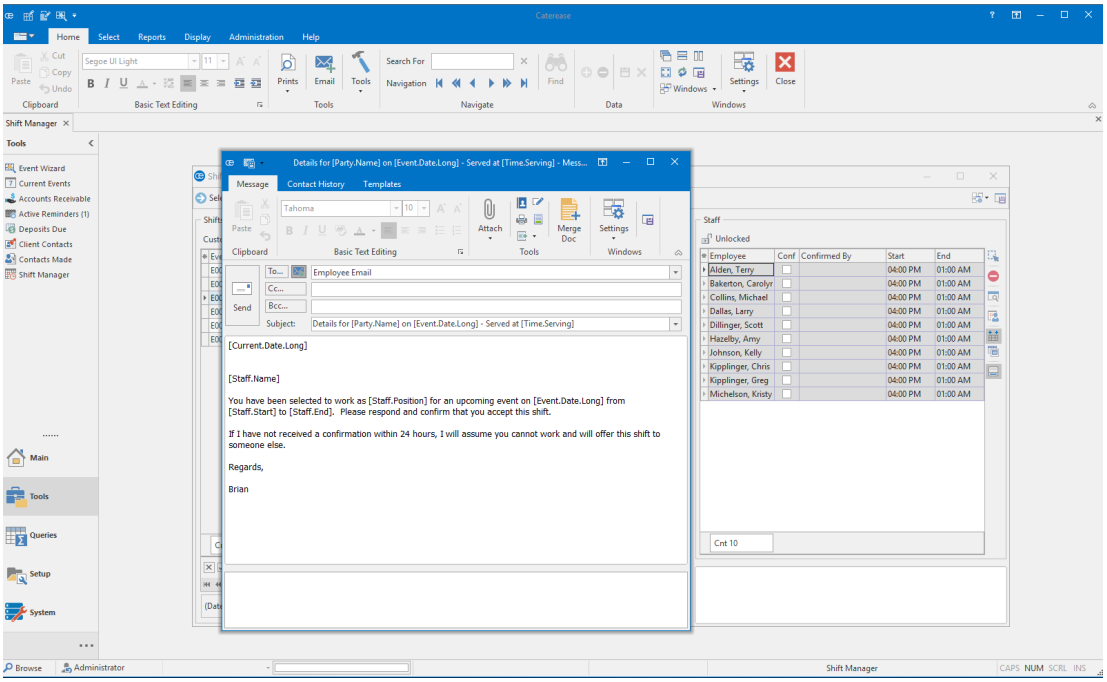
6. Click **Yes** to confirm your choice.
   Result: *The Staff section is unlocked, and employees can now be booked for the event.*

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).*

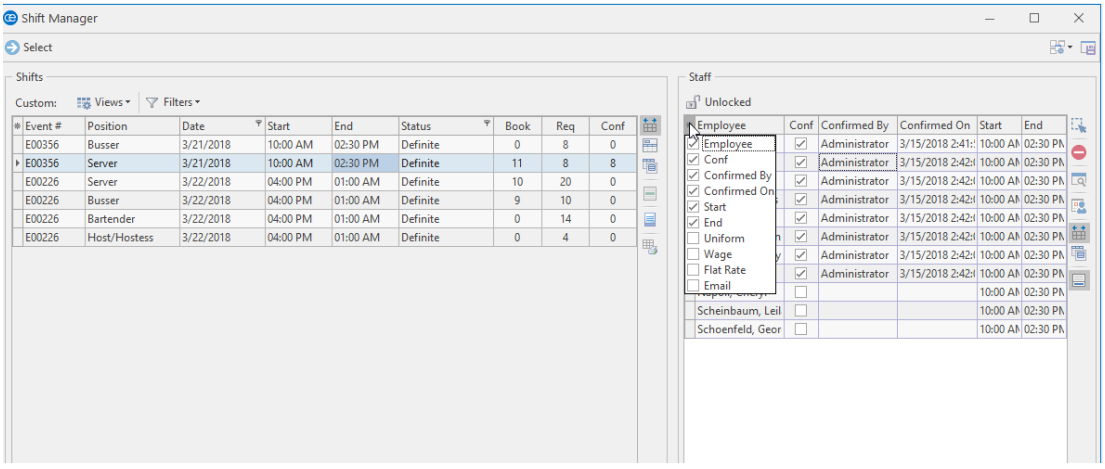
7. Click into the **Conf.** (Confirm) checkbox to confirm the employee or employees will work an event.

   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

Tracking Employee Data

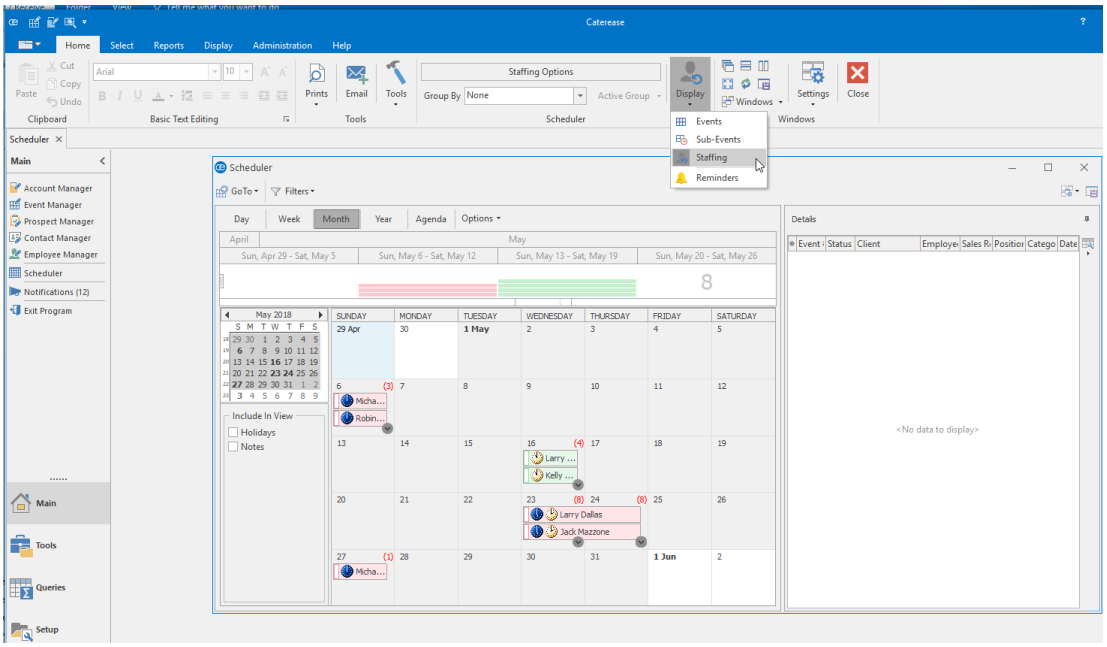
You can view your scheduled staffing in multiple ways, including separate calendars based on a variety of staffing details.

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

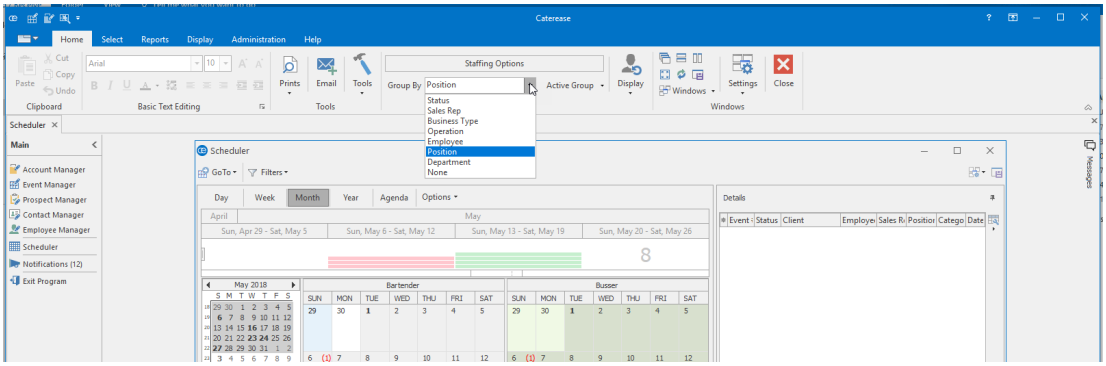
The powerful grouping option in the Scheduler lets you create separate calendars based on a variety of staffing details.

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.*

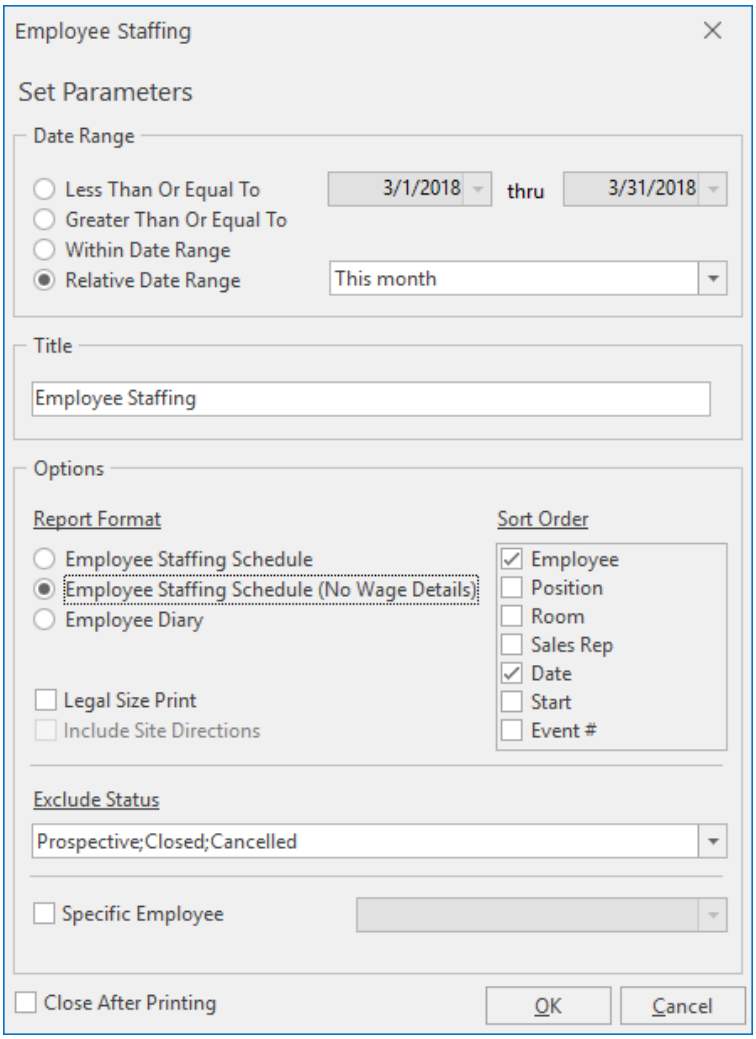
6. Click into the checkbox to the left of **Legal Size Print** if you would like to print your report on legal-sized paper.

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.*



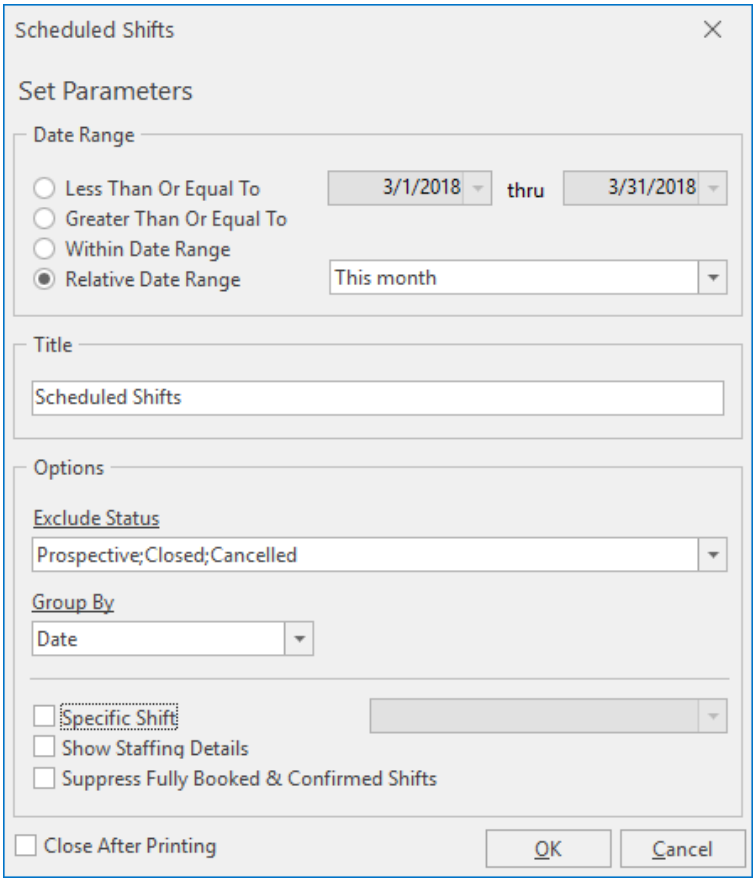
Tip: *Optionally click into the checkbox labeled* ***Close After Printing*** *at the bottom left of the window to have this window close automatically as soon as your report has been generated.*

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.*



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

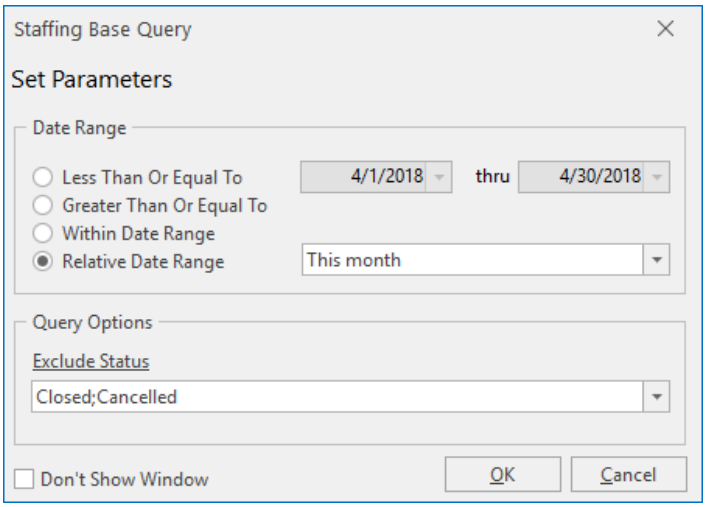
The Staffing Query is designed to track all employees you have booked for any day or date range. As with other "activity" queries, you can sort, group, or filter your data.

Running a Staffing Query

> ***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.*

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

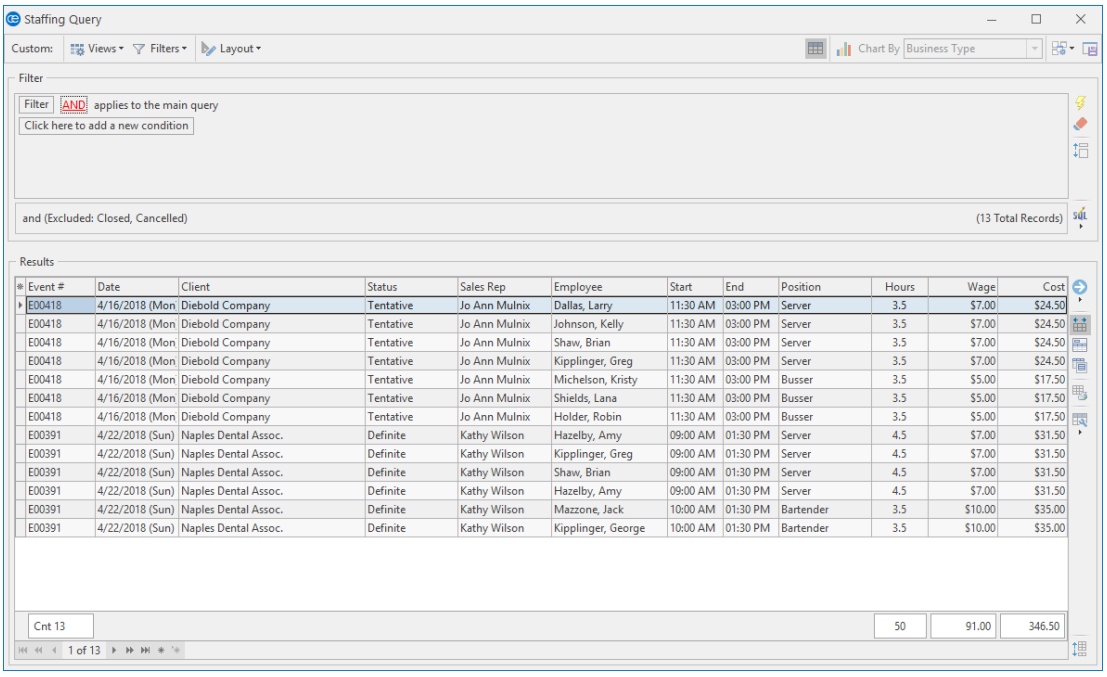
2. Click the **Staffing Query** button on the left-hand side of the screen.
   Result: *The Staffing Base Query window opens.*
   Note: *A Staffing Query for a particular event can be generated by clicking the* ***Staffing Activity for Event*** *button* *from the* ***Staffing*** *tab in Event Manager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



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
Cnt 13
50
91.00
346.50
1 of 13

CATEREASE

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