

StaffMate Online: Quick Start Guide

Welcome and congratulations on your decision to utilize StaffMate Online to significantly streamline your staff scheduling process. This Quick Start Guide is not intended to familiarize you with every facet of our application, but is intended to simply guide you through initial set-up and get you on your way toward entering, publishing and staffing events.

Before beginning the steps in this guide, you must decide how you are going to proceed. If you are planning to fully implement StaffMate Online immediately, you should proceed through the steps entering full and complete information. If you are wishing to simply review the software, you can enter partial and/or test information.

For example, when entering position titles, use real position titles, but maybe only add a couple. And when entering staff members, use names like Fred Flintstone and use YOUR email address. Using your email address allows you to later log in as an employee and see StaffMate Online the way your employees will.

Whether you are simply reviewing StaffMate Online for potential use in your organization or integrating it fully into your current staff scheduling process, this Quick Start Guide will provide you with the fundamentals to be successful immediately.

The Quick Start Setup Process

Preview: Familiarize Yourself with the Job Calendar

Step 1: Enter Position Titles
Step 2: Add Employees

Step 3: Enter Favorite Venues
Step 4: Add Your First Event

Step 5: <u>Schedule Staff For Your Event</u>

We strongly suggest that, before you go any further, you print this quick start guide for easy reference. We also suggest you copy your log in information from the welcome email to the lines below so that you have the information whenever you have a few minutes to explore another step of our Quick Start Guide.

Web Address	http://	staffmate.com
User Name		
Password		

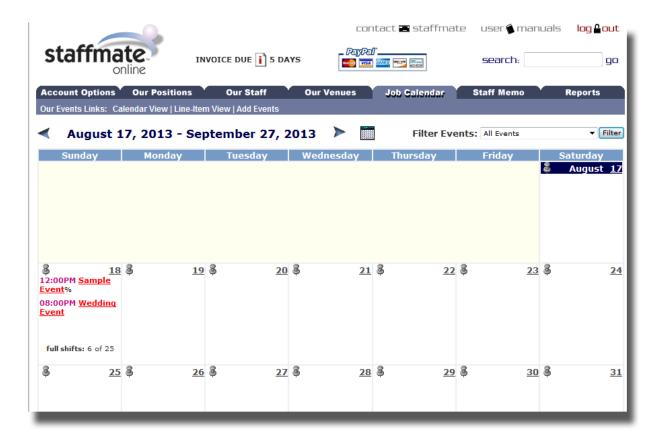


Preview: Familiarize Yourself with the Job Calendar

We can't yet enter events until we have completed a few necessary set-up steps, but now is a good time to take a few minutes to become familiar with the Job Calendar. Each time you log in, you will automatically be transported to the job calendar page.

You can, however, reach the Job Calendar at any time during your session by clicking on the <u>Job Calendar</u> tab at the top of the screen. The Job Calendar always displays the current day and 31 days in advance. Each upcoming event will appear on your calendar on the day for which it is scheduled.

Since this is most likely the first time you have used StaffMate Online, there will be no events listed on your calendar. However, once you have entered events, you will notice that Event Titles are displayed in primarily two colors. Those events displayed in a grayish color are events which **are** currently fully staffed. Event Titles displayed in Red are events which **are NOT** currently fully staffed.



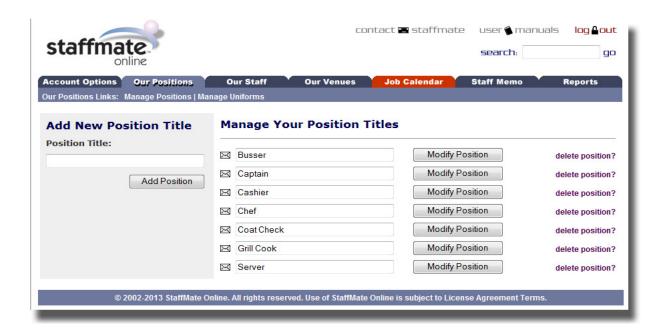
Job Calendar Navigation

To display months other than the current 31 day period, you can use the blue arrows located on either side of the Month & Year display at the top of the calendar. These arrows will transport you to either the previous 31 day period or the next 31 day period, depending on which blue arrow you click. You may also click the calendar icon located to the right of the Forward Blue Arrow. This will allow you to instantly jump to any date from the previous month through the next 11 months.



Step 1: Enter Position Titles

In order to set up StaffMate Online for first time use, you must first enter the position titles you use in your business to classify your service staff. To get to the positions titles page, simply click on the <u>Our Positions</u> tab located toward the top of the StaffMate Online screen.



Add or Modify Starting Position Titles

Once on the Positions page, seek out the "Add New Position Title" section, located on the left-hand side of the page. Simply type a Position Title and click the <u>Add Position</u> button. The new position type is now available to assign to staff members and to staff events with.

To modify a position type, seek out the "Manage Your Position Titles" section of the page. Simply modify the Position Title and click the <u>Modify Position</u> button on the line of the updated position. The position title will automatically and instantly update throughout your StaffMate Online account. You can change only one position title at a time.

BEGIN QUICK START GUIDE ACTION ----→

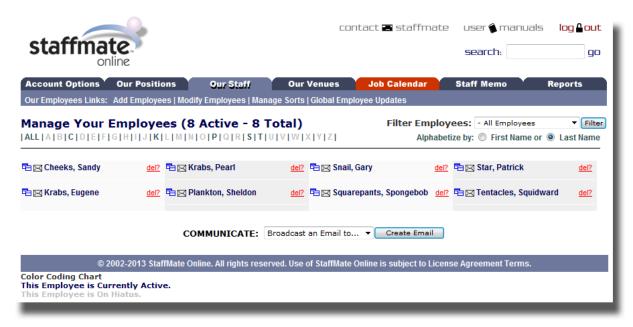
If you are fully implementing StaffMate Online immediately, take a few minutes to add all of your position titles. If you're simply reviewing the software for potential use, enter at least 2 or 3 position titles that you use in your daily operations. If you make a mistake, simply modify the errant position title.

Once you have added your position titles, proceed to **Step 2: Add Employees**. **END QUICK START GUIDE ACTION ----**



Step 2: Add Employees

In order to set up StaffMate Online for first time use, you must also enter at least a few service staff members. To get to the staff management page, simply click on the <u>Our Staff</u> tab located toward the top of the StaffMate Online screen.



The Staff Management Page lists each of the service staff members you have entered in StaffMate Online. Since this is most likely the first time you have used StaffMate Online, you should be the only employee listed on the Staff Management Page.

BEGIN QUICK START GUIDE ACTION ----→

From the Staff Management Page, locate the blue bar below the tabs. Included in this blue bar are links that apply to the staff management section of StaffMate Online. Included among these links is the link to <u>Add Employees</u>. Click this link to get to the Add a New Employee Page.

END QUICK START GUIDE ACTION ----→

Fully adding a staff member is a three step process. There is also a one-step Employee Quick Add, but for the purposes of initial clarification and training, we will be choosing the Employee Full Add option once we finish entering the information on this page.

Remember, if you are fully implementing StaffMate Online immediately, use full and complete information whenever possible. If you are simply wishing to review StaffMate Online, feel free to use whatever information you like, fake or real.

We do suggest, however, that if you are using fake information, that you use **YOUR** email address for at least one of the employees so you can see what types of notifications they receive and you are capable of logging in as this employee to see what they will see once you fully implement StaffMate Online into your staff scheduling process.



Add a New Employee * All Maroon Fields are Required First Name: Last Name: Squarepants Spongebob Fmail Address: support@staffmate.com TIP: The Max Hours field stores the maximum number of hours for which you wish this Max Hours: employee to be able to sign up in any given work week TIP: Employees can be separated by up to 5 "Levels" based upon any criteria you wish **Employee** Level 1 to use. Levels can be associated with performance, pay grades, seniority, etc. When Level: you choose to publish event information to your employees, you can choose when or whether to publish the work opportunity to a certain level or levels. This can be used to reward better performing employees with a "Head Start" by publishing to one "level" of employees a few days in advance of other "levels". Use the "On Hiatus" level for employees on vacation, returning to school or on suspension TIP: If you choose to give Full Admin Access to any employee, they will have the same Admin Access: © Full Admin Access access and privileges as you do. If you choose to give Employee & Fill In Report Access Employee & Fill In Report Access to this employee, along with their ability to sign up to work events, they will also have the ability to print Employee Reports and Fill In Reports for events. This is especially No Admin Access useful for employees in leadership positions. Positions for which this employee is qualified: Checkmark the positions for which this employee is eligible. By assigning positions to employees, you are giving them the ability to work positions of that particular type. For example, by assigning the Bartender position to this employee, you would be giving this employee the ability to sign up for Bartender positions for any given event. If you wish to track event Employee costs with StaffMate Online's budget feature, include the pay rate for each position checkmarked. Busser Pav Rate **\$** 11.00 per hour. Captain Pav Rate per hour. Cashier Pay Rate per hour. Chef Pay Rate **\$** 19.00 per hour. Coat Check Pay Rate per hour. ▼ Grill Cook Pay Rate **\$** 16.50 per hour. Server Pav Rate per hour. If you wish to add this new employee and continue to add If you wish to add this new employee and quickly move on to adding additional employees, click the "Employee Quick Add" other information relative to this employee, click the "Employee Full Add" button below. This option will allow button below. The information above is adequate to get the you to continue to add the employee's address, phone employee started using StaffMate Online and if you have a lot of numbers, ID number, start date, birth date and review employees to add, use the Quick Add feature to quickly save just this basic information and move on to add another employee. You can always add the other employee information at a later time. Employee Full Add Employee Quick Add

BEGIN QUICK START GUIDE ACTION ----→

STEP 1: Enter the following information for the first employee you wish to add:

First & Last Name: The first and last names ARE both required to add a new employee.

Email Address: The email address field **IS NOT** required. However, if an email address is provided, a welcome email will be automatically sent to this new employee once we proceed to step 2 of the employee addition process. The welcome email details how to use StaffMate Online from the staff member's perspective. This email also provides the employee with a link to StaffMate Online and provides his/her automatically generated user name and password so they may immediately access their own personal StaffMate Online calendar.

Max Hours: The Max Hours field sets the maximum number of hours for which you wish this employee to be able to electronically sign up in any given work week. If left blank, the Default Max Weekly Hours entered on your **Account Info** page will be used.



Employee Levels: Employees can be separated into 5 different "Levels" based upon any criteria you wish to use. For example, the levels can be associated with performance, pay grade, seniority, etc. How you use the Levels is entirely up to you.

How are the levels useful? Once we get to the point to where we are entering and publishing events, you will see the option to publish the event by employee level. This allows you to reward better performing employees with a "Head Start" by publishing to one "level" of employees a few days in advance of other "levels".

Furthermore, use the "On Hiatus" level for employees on vacation, employees returning to school or employees on suspension. Staff Members on hiatus will not receive any email correspondence from your StaffMate Online account, other than individual emails you send directly to them. In addition, they will not be able to view events published during their hiatus on their job calendar.

Admin Access: The choice you make here determines what privileges this employee will enjoy. If you choose to give Full Admin Access to this employee, they will have the same access and privileges as you do.

If you choose No Admin Access, this employee will have no administrative privileges. The employee will have access to his/her own personal calendar where he/she can review only work opportunities you have chosen to publish to him/her and work obligations for which this employee is scheduled. In addition, "No Admin Access" staff members will have the ability to update only their own contact information.

If you choose to give Staff & Fill In Report Access to an employee, this staff member will be treated just like a "No Admin Access" employee in every way except that he/she will also have the ability to print Staff Reports and Fill In Reports for events. This is especially useful for Captains or Leads to whom you may not wish to give Full Admin Access but wish to have the ability to manage event day staffing issues.

A Staff Report is an event day printable report detailing all vital event information, including which employees are working which positions at what times. It also includes contact phone numbers for each employee scheduled, just in case you need to contact them. A Fill In Report lists contact phone numbers for each employee **NOT SCHEDULED** to work this event, just in case additional employees are needed on event day.

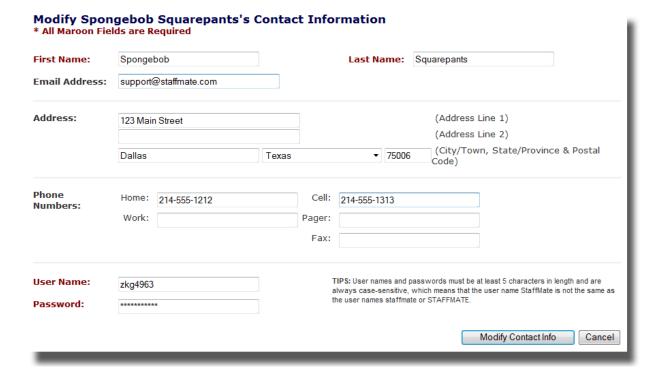
Staff Positions: Check mark each position for which this employee is qualified. By checking position titles, you are giving this employee the ability to request to work positions of these types.

If you currently manage or would like to start managing staff budgets and costs for each event, enter individual pay rates for each position you check marked for this employee. StaffMate Online will then track how much money the staff is costing you for each event you enter from now on.

When you're done entering the information, click the <u>Employee Full Add</u> button to add this initial information, send the welcome email and continue to the step 2 of the employee addition process: Modify Employee Contact Information.

END QUICK START GUIDE ACTION ----→





BEGIN QUICK START GUIDE ACTION ----→

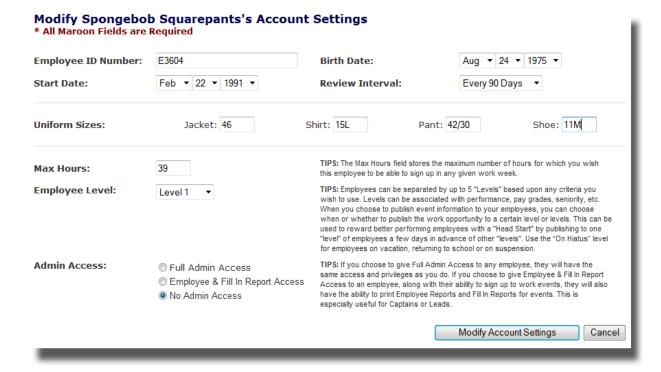
STEP 2: Enter the contact information you have on file for this employee. If entering a fake employee, make up contact information or use your company's contact information. The contact address information and phone numbers **ARE NOT** required, however the phone numbers in particular provide you with additional means of contact should an employee fail to show for an event for which he/she is scheduled.

DO NOT CHANGE EMPLOYEE'S USER NAME AND PASSWORD: Remember that during the first step of the employee addition process, this staff member was automatically sent a welcome email with their StaffMate Online-generated user name and password included. Changing their user name and password now would only serve to confuse the employee. Once logged in, each employee has the ability to change their user name and password to something more memorable to them anyway.

Once you have finished entering contact information for this employee, click the button titled <u>Modify Contact Info</u> to add this information and proceed to the final step of the employee addition process: Modify Employee Account Settings.

END QUICK START GUIDE ACTION ----→





BEGIN QUICK START GUIDE ACTION ----→

STEP 3: You have already entered this employee's Max Hours, Employee Level and Admin Access in the first step of the employee addition process, so it is unnecessary to change those fields on this page, unless you have cause to.

The other five fields on this page are not required, but in certain circumstances could prove helpful to you in one capacity or another:

Employee ID Number: If you use employee ID numbers in your business, you can enter the ID number for the staff member you are adding in this field. Since you can search employees by (among other things) Employee ID Number, this number can be useful for quickly locating this employee.

Birth Date: If you enter a birth date for this employee, balloons will appear on this date on your job calendar to remind you to recognize this staff member's special day. Click the balloons and all staff members sharing this birthday will be listed along with their contact phone numbers, email addresses, ages and home addresses just in case you wish to call, email or U.S. mail a greeting to each celebrant.

Start Date & Review Interval: If you choose to enter a Start Date and Review Interval, a reminder graphic (a hand with a pen writing on a tablet of paper) will appear on the dates on which this employee's evaluations are due. Enter these fields and use this feature if you currently evaluate or would like to start evaluating your service staff members. Also, by entering Start Dates, you can sort publishing and scheduling lists by seniority.

Uniform Sizes: If uniform sizes are important to your organization, feel free to enter that information here.



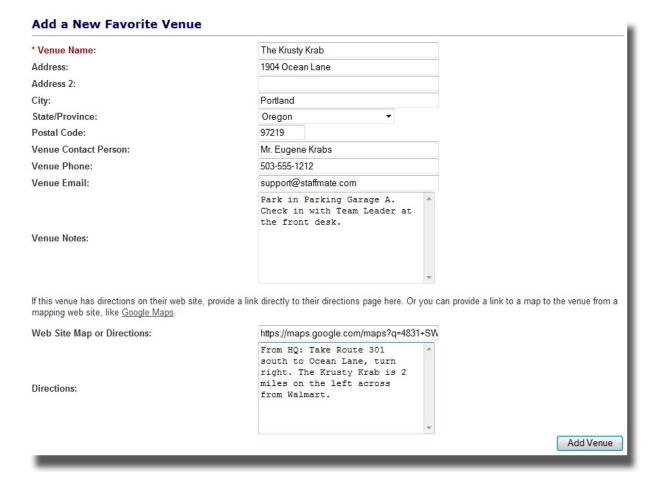
Once you are finished entering this employee's account settings, click the button entitled <u>Modify Account Settings</u> to complete the employee addition process. This will bring you to this employee's Profile Page detailing all of the information you have just entered.

Even if you are just entering pretend employee information, we strongly suggest that you enter at least 1-2 additional fake employees to give yourself several staff members to utilize in the fake events you will be entering later. This will give you a better opportunity to more fully explore event options once we reach that part of the Quick Start Guide.

END QUICK START GUIDE ACTION ----->

Step 3: Enter Favorite Venues

Although entering Favorite Venues is not required in order to set up StaffMate Online for first time use, entering at least one favorite venue will provide you an opportunity to see how favorite venues are presented when entering your events. To get to the favorite venues page, simply click on the tab entitled <u>Our Venues</u> located toward the top of the StaffMate Online screen. On the subsequent page (The Favorite Venue management page), click on the <u>Add Favorite Venues</u> link in the blue bar below the tabs.



Venue Name is required; the Address, Address Line 2, City, State and Zip fields are not. However, providing this information will allow your staff members to see the address of the venue so they know how to get there on event day. The Venue Contact, Phone and



Email Address are not required either and are not visible to your staff members, but are useful if you need to make contact with the venue to finalize staffing plans.

Web Site Map or Directions: This field allows you enter a link to either directions available on the venue's Web site or maps available on services such as Google Maps.

Directions: This field allows you to enter your own driving directions to this venue. Providing this information will ensure that each of your staff members have accurate directions to the event.

BEGIN QUICK START GUIDE ACTION ----→

Enter at least one favorite venue. Again, you can use pretend information if you wish. Once you're finished entering the venue information, simply click the "Add Venue" button to save this venue information and return to the venue management page.

END QUICK START GUIDE ACTION ----→

Step 4: Add Your First Event

Now that you have completed initial set up, you are ready to enter your first event. The event addition process is divided into three separate steps: Entering Vital Details, Entering the Event Venue (or Verifying the Information from a Favorite Venue), and Adding Positions and Shifts to the Event.

To add your first event, return to the job calendar by clicking on the <u>Job Calendar</u> tab toward the top of the StaffMate Online screen. On the calendar, locate the date to which you wish to add this event and simply click on the date. For example, if you wish to add an event to the 22nd, simply click on the number 22 representing that date. This will bring you to the first step of the event addition process.

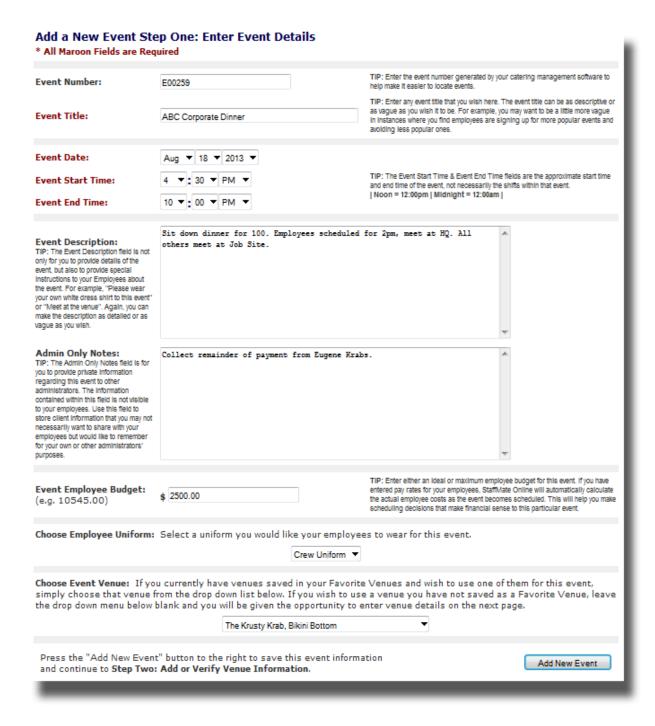




Is Your Event 31+ Days Off?

To add an event outside of the 31 day period exhibited on the job calendar, simply use the navigation features we discussed at the beginning of the Quick Start Guide to proceed to the date to which you wish to add the event.

Use the blue navigational arrows or the calendar icon located near the Month & Year display on the StaffMate Online Job Calendar screen to proceed to the date to which you wish to add the event.





BEGIN QUICK START GUIDE ACTION ----→

STEP 1: Enter the information as requested below to begin the event addition process.

Event Number: Although this field **IS NOT** required, if you utilize event numbers in your business to identify specific events, you can place that number here. Since you can search events based upon event numbers (among other things), entering a number here can help you quickly and easily locate this event using the search feature. Additionally, an event number helps avoid confusion between two similarly titled events.

Event Title: This field **IS** required. Enter any event title that you wish here. The event title can be as descriptive or as vague as you wish it to be. For example, you may want to be a little more vague in instances where you find staff members are signing up for more popular events and avoiding less popular ones.

Event Date: This field **IS** required and if you clicked on a specific date to enter this event, this field should already be populated.

Event Start & End Times: These fields **ARE** required. The Event Start Time & Event End Time fields are the approximate start time and end time of the event, not necessarily the shifts within that event. **NOTE:** Noon = 12:00pm and Midnight = 12:00am.

Event Description: This field **IS NOT** required but highly important. The Event Description field is not only for you to provide details of the event, but also to provide special instructions to your employees about the event. For example, "Please wear your own white dress shirt to this event" or "Meet at the venue". Again, you can make the description as detailed or as vague as you wish.

Event Staff Budget: This field **IS NOT** required but useful if you would like to track how much your staff will be costing you for a specific event. Enter either an ideal or maximum staff budget for this event. If you have entered pay rates for your employees, StaffMate Online will automatically calculate the actual staff costs as the event becomes staffed. This may help you make staffing decisions that make financial sense to this particular event.

Choose Event Venue: Although this field **IS NOT** required, it makes sense to make sure your employees have accurate venue information. This field lists all of the favorite venues you have saved with StaffMate Online. Choosing one of these favorite venues will save you from having to retype all of the information each time you have an event at this venue. During the next step, you will be presented with an opportunity to verify the venue information and make event-specific changes. If the event is being held at a non-favorite venue, you can leave this field blank and when you proceed to the next step, you will be asked to enter venue information for this event.

Once you have finished entering the information on this page, click the <u>Add New Event</u> button to proceed to the next step of the process: Add or Verify Venue Information.

END QUICK START GUIDE ACTION -----

BEGIN QUICK START GUIDE ACTION ----→

STEP 2: If you chose a favorite venue during the first step of the event addition process, simply verify the information on this venue page. If you would like to make changes or provide event-specific venue information, feel free to do so. For example, if you have a favorite venue called The Civic Center and this particular event is being held in the Jefferson Ballroom, you can add that information to this venue information.



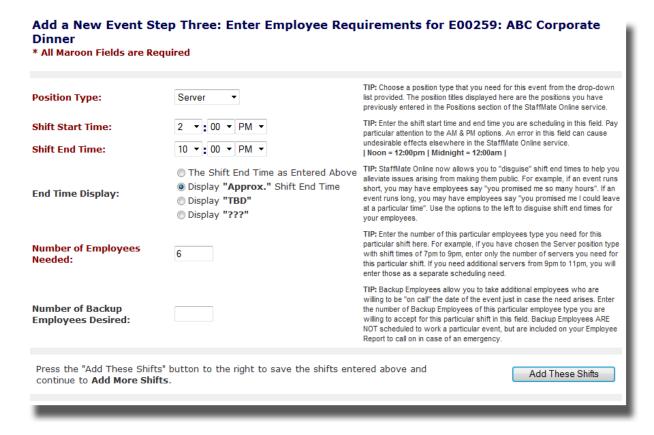
Any updates or changes you make here will only apply to this event and **WILL NOT** affect the information saved in the favorite venue section.

If you left the venue blank during the first step of the event addition process, you will be asked to provide venue information here. You will also be given the opportunity to save this new venue as a favorite venue, if you so choose.

If this is a one-time use venue (like a private residence), do not add it as a favorite venue. However, if this is a venue you plan to use frequently, place a check in the box entitled **YES, Add this Venue to our Favorites**.

Once you have finished entering or verifying the venue information on this page, click the <u>Enter Venue Information</u> or <u>Modify Venue Information</u> button to proceed to the final step of the event addition process: Enter Employee Requirements.

END QUICK START GUIDE ACTION ----→



STEP 3: In this final step of the event addition process, you will be asked to enter position titles and shifts that you require to staff this event. Each position title with a unique shift start or end time requires a separate entry. For example, if you need 10 wait staff from 4:30pm to 6:30pm and 5 more wait staff from 5pm to 10pm, that would require two separate entries. This step of the process is a revolving step. This means that each time you enter a new position/shift, you will be returned to this page to enter more positions/shifts as needed.



BEGIN QUICK START GUIDE ACTION ----→

Enter the following information as requested and repeat the process for all additional position titles and shifts you require for this event:

Position Type: This **IS** a required field. Choose a position type that you need for this event from the drop-down list provided. The position titles displayed here are the positions you have previously entered in the Positions section of the StaffMate Online service.

Shift Start Time & Shift End Time: These fields **ARE** required. Enter the shift start time and end time you are scheduling in this field. Pay particular attention to the AM & PM options. An error in this field can cause undesirable effects elsewhere in the StaffMate Online service. **NOTE:** Noon = 12:00pm & Midnight = 12:00am.

End Time Display: StaffMate Online allows you to "disguise" shift end times to help you alleviate issues arising from making them visible to your employees.

Number of Staff Needed: This IS a required field. Enter the number of employees you need for this position title at this particular shift time.

Once you have finished entering this first position title and shift times, click the button entitled <u>Add These Shifts</u> to add these shifts and return to this page to enter more shifts.



Add a New Event Step Three: Enter Employee Requirements for E00259: ABC Corporate * All Maroon Fields are Required TIP: Choose a position type that you need for this event from the drop-down **Position Type:** Captain list provided. The position titles displayed here are the positions you have previously entered in the Positions section of the StaffMate Online service. TIP: Enter the shift start time and end time you are scheduling in this field. Pay **Shift Start Time:** 4 **▼**: 15 **▼** PM **▼** particular attention to the AM & PM options. An error in this field can cause undesirable effects elsewhere in the StaffMate Online service. Shift End Time: 10 ▼ : 30 ▼ PM ▼ | Noon = 12:00pm | Midnight = 12:00am | The Shift End Time as Entered Above TIP: StaffMate Online now allows you to "disguise" shift end times to help you alleviate issues arising from making them public. For example, if an event runs Oisplay "Approx." Shift End Time short, you may have employees say "you promised me so many hours". If an **End Time Display:** Oisplay "TBD" event runs long, you may have employees say "you promised me I could leave at a particular time". Use the options to the left to disguise shift end times for Display "???" TIP: Enter the number of this particular employees type you need for this particular shift here. For example, if you have chosen the Server position type **Number of Employees** with shift times of 7pm to 9pm, enter only the number of servers you need for Needed: this particular shift. If you need additional servers from 9pm to 11pm, you will enter those as a separate scheduling need. TIP: Backup Employees allow you to take additional employees who are willing to be "on call" the date of the event just in case the need arises. Enter **Number of Backup** the number of Backup Employees of this particular employee type you are willing to accept for this particular shift in this field. Backup Employees ARE **Employees Desired:** NOT scheduled to work a particular event, but are included on your Employee Report to call on in case of an emergency Press the "Add These Shifts" button to the right to save the shifts entered above and continue to Add More Shifts. If you are finished entering shifts, press the Add These Shifts "Finalize Scheduling Requirements" button below to finalize the Event Addition process. **Employee Requirements Entered So Far Shift Position Type** Shift Start & End Times Display Shift End Time As: 02:00PM to 10:00PM Approx. 10:00PM 6 Server Press the "Finalize Scheduling Requirements" button to the right to complete the process of adding employee requirements and finalize the Event Addition Finalize Scheduling Requirements

Once returned to this page, you will see the newly added shifts at the bottom of the page. You can continue to add position titles and shifts as desired and click the button entitled <u>Add These Shifts</u> to add the shifts and return to this page to add more.

Once you are finished adding positions to this event, you may click the button entitled <u>Finalize Staff Requirements</u> to complete this step and proceed to the Event Management Page for this newly added event.

END QUICK START GUIDE ACTION ----→





Event Management Page

Once you have finished entering the new event, you will be transported to the Event Management Page which details all of the information you just entered for this event. This page is the nerve center for scheduling staff for this event. This is the same page you would be transported to if you were to click on an event title on your calendar.

VERY IMPORTANT POINT: Right now, you and others to whom you have given Full Admin Access are the only people who know this event is even happening. Your staff members can not yet even see this event on their job calendars.

All newly added events start off private, "hidden" from staff members until you decide to manually schedule and/or publish the event to the staff members you feel are best suited to work this event. And even then, only those you schedule or to whom you publish the event will be alerted to the work opportunity via email and be able see the event on their calendar. This brings us to the final step of the Quick Start Guide: Schedule Staff For Your Event.



Step 5: Schedule Staff For Your Event

Now the question is, how do we go from an event that none of your staff can see on their calendars to getting JUST the right people scheduled to work it? StaffMate Online has the most intricate set of tools ever designed to help you quickly, accurately and efficiently get the event information to just the right people, in the right order and in the right manner. Use any combination of methods on each event for the desired scheduling mix.

METHOD 1: Manually Schedule with Auto-Accept: Use this scheduling method when you are certain that you want particular employees to work specific positions within this event and know that they are willing and available to do so. When you manually staff and auto-accept a staff member for a position within an event, you are scheduling and automatically confirming them to work the event. This employee will receive an email notifying them of their obligation to work the event, complete with all vital event details.

METHOD 2: Manually Schedule with Seek Reply: Use this scheduling method when you are certain that you want particular employees to work specific positions within this event but are uncertain of their willingness and/or availability to do so. When you manually schedule and seek a reply from a staff member for a position within an event, the staff member will automatically receive an email notifying them of your request and asking them to log into StaffMate Online, review the event details and either accept or reject the offer. Unless you end up retracting the offer, the position for which you sought a reply will be held for this employee until such time that they accept or reject the offer.

METHOD 3: Publish, Request & Confirm: This method allows you to publish an event to select staff so that they have the opportunity to log into their own personal calendar, any place, any time, to request to work the event on a first come, first served basis. Once an employee has requested to work the event, it is up to you whether to lock them in by confirming them, move them to another shift or event, or reject their request altogether.

Employee Requirements This event is currently \$2,500.00 UNDER budget	. : Add More Shifts to This Event : .		
>> 6 Server Employees (Still Need: 6)	02:00PM - 10:00PM (Approx. 10:00PM)		
Manually Schedule Some Server Shifts Remove Some Vacant Server Shifts			
There are no employees yet scheduled for this shift!			
>> 1 Captain Employee (Still Need: 1)	04:15PM - 10:30PM (Approx. 10:30PM)		
Manually Schedule Some Captain Shifts Remove Some Vacant Captain Shifts			
There are no employees yet scheduled for this shift!			

HOW TO: Manually Schedule with Auto-Accept & Seek Reply

To manually schedule employees, first locate the position title and shift time in the Employee Requirements section of the Event Management Page that you are interested in scheduling. Once you have located the position and shift you want to schedule, simply click the link below the position title which reads <u>Manually Schedule Some [POSITION TITLE] Shifts</u>.



Cancel This Scheduling Action

E00259: ABC Corporate Dinner: Schedule the Server 02:00PM to 10:00PM Shift Sunday August 18, 2013 04:30PM to 10:00PM Below is a list of all employees who are eligible to work the Server 02:00PM to 10:00PM Shift, filtered by any targeting you have already chosen to activate. You can target and narrow the list further by clicking one of the filter/SORT Categories below or you can simply select the employees you wish to schedule for this shift, either Auto-Accept or Seek Reply. Once you have finalized filtering/targeting employees and finished making your selections, click the "Manually Schedule..." button to complete the scheduling process instantly. Choose Up To 3 Employees Below Order List By: First or Last Name | Seniority | Last Scheduled or Worked Event | Hours or Shifts This Week | Employee Level Server Employees (Level) Important Employee Scheduling Information Schedule Accept Reply Pearl is already scheduled for the following events on this date: Sample Event from 01:00PM to 05:00PM Pearl has not yet set up the availability feature on his or her 0 0 Krabs, Pearl (2) Sheldon has not yet set up the availability feature on his or her 0 0 Plankton, Sheldon (4) Patrick is already scheduled for the following events on this date: Sample Event from 01:00PM to 05:00PM Wedding Event from 08:00PM to 01:00AM Availability entered for Patrick does not include any hours for 0 Star, Patrick (1) Sunday August 18, 2013 0 0 Tentacles, Squidward (1) Manually Schedule Selected Employees Manually Schedule selected staff into the 02:00PM to 10:00PM Server Shifts. By using the Auto-Accept option you, as the Admin, will be giving the employee no choice in selecting or accepting the shift. You are making that choice for them. By using the Seek Reply option, you are holding shifts for the selected employee(s) until they log in to their calendars and either accept or reject the job offer. NOTE: If you select more employees than there are shifts available, shifts will cease being assigned when the last shift is taken. In other words, if you have 8 shifts available but select 10 employees on this page, only 8 employees will be placed into the 8 spots available. Manually Schedule the 02:00PM to 10:00PM Server Shifts

Once on the Manual Scheduling Page for this particular position & shift, utilize the SORT fields in the brown boxes to narrow your targeting of employees (you can add more custom SORTS as you explore more advanced StaffMate Online features), use the <u>Order List By</u> links to display the employees in an order that helps you make scheduling decisions and utilize the stick-figure icons and Important Scheduling Information to help determine the best employees for this shift.

Remove ALL Targeting

Need a memory boost for a particular employee? Click the snapshot icon to the left of the employees name for a quick look in a pop-up window at the most vital employee info.

Once you feel you have properly targeted the best employees and have them listed in an order that helps you make scheduling decisions, simply choose either <u>Schedule with Auto-Accept</u> or <u>Schedule with Seek Reply</u> for each employee you wish to manually schedule for this shift/position for this event then click the <u>Manually Schedule...</u> button at the bottom of the page to instantly add the chosen employees to the schedule and send them notification emails with full event and shift details.



HOW TO: Publish Work Opportunities to Your Service Staff

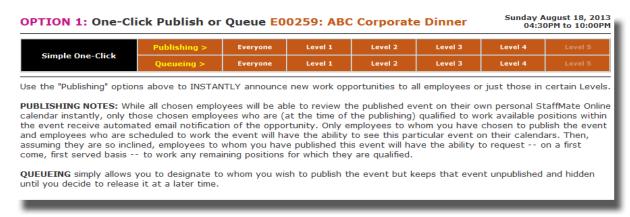
Maybe you don't feel like hand-picking and manually scheduling all employees you need for an event and that's where the Publish, Request & Confirm Method comes in handy. Publishing an event accomplishes two tasks, it makes the event visible on the calendars of staff members to whom you have chosen to publish the event AND it sends a notification email to those in the publish group who are qualified to work positions still available for this event.



Publishing vs. Queueing

Both options allow you to select the employees to whom you wish to ultimately publish an event. The only difference is that Publishing an event will **instantly** release the event to selected employees while Queueing an event will save the selected employees in a Publishing Queue, keeping the event unpublished and hidden until you decide to release the event at a later time, maybe in conjunction with other events you are entering for the week.

Once you decide *how* you're going to release the event, the next question is *to whom* do you wish to release the event.



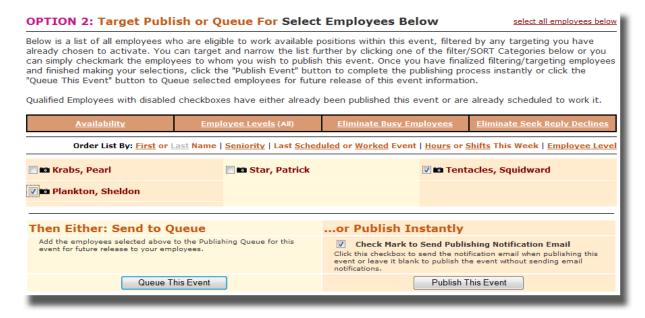
Simple One-Click Publishing/Queueing to Everyone: With one simple click of the <u>Everyone</u> button, you can **instantly** publish or queue this event to each and every staff member. Once published (either instantly or through future release of a queued event) every staff member will be able to see this event on their staff calendars and those qualified to work positions still available for this event will receive a notification email, with all vital event details.



Our clients generally use the Publish to Everyone option when either they receive a lastminute event which requires a speedy scheduling solution or when they receive a large event where simply scheduling warm bodies will suffice.

Simple One-Click Publishing/Queueing to Levels (1-5): With one simple click of any of the <u>Level 1 – Level 5</u> buttons, you can publish or queue this event to each of your staff members within that particular level. Once published (either instantly or through future release of a queued event) every staff member in that level will be able to see this event on their staff calendars and those within the level qualified to work positions still available for this event will receive a notification email, with all vital event details.

Remember, Employee Levels can represent anything you want them to and are considered a quick and easy way to classify your employees. For example, Level 1 can contain each of your most loyal, able and reliable employees. Each level below Level 1 can contain staff members with degrading degrees of loyalty, ability and reliability. When it comes time to publish events, you may want to publish to Level 1 employees first, then Level 2 and so on, down the line. This rewards better performing employees with first choice of positions and shifts and more work opportunities.



Targeted Publishing/Queueing to Selected Employees: If you'd rather be more selective when deciding to whom to publish an event, then Targeted Selective Publishing/Queueing is the option for you. Utilize the SORT fields in the brown boxes to narrow your targeting of employees (you can add more custom SORTS as you explore more advanced StaffMate Online features), use the Order List By links to display the employees in an order that helps you make scheduling decisions and select just the employees to whom you would like to Publish or Queue this event.

NOTE: If an employee's check box is checked and disabled, they are either already scheduled to work this event or you have already published the event to him/her.

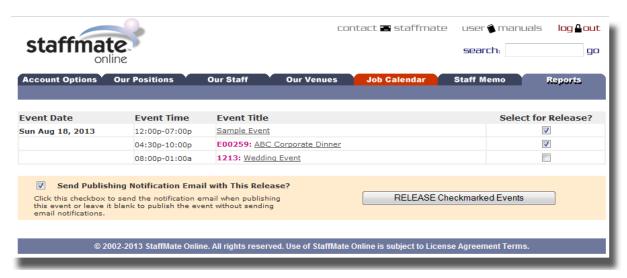
Then What? Once an event has been published, chosen employees can review event details on their own calendar and can request to work any positions within that event for which they are eligible on a first come, first served basis. It is then up to you as the



administrator to confirm the request, move the employee to another shift or event, or reject the request altogether.



Releasing Queued Events: Let's say you have sent several events to the publishing queue and are now ready to release them to your employees. At the top of every queued Event Management Page, there will be a link to release queued events. You can also get to the Release Queued Events page by clicking on the Reports Tab and then clicking on the link entitled *Release Queued Events*.



Select the events you wish to release at this time, check mark if you'd like a publishing notification email to be sent with this release and click the <u>RELEASE Checkmarked Events</u> button to release the events to the calendars of those employees you selected for each event when you sent each event to the publishing queue.

Quick Start Guide Conclusion

Now that you have completed the Quick Start Guide, you should have a firm grasp of StaffMate Online's basic operations like adding positions, entering employees, creating new events and the methodology and concept behind publishing and staffing events. But, there is so much more to discover with StaffMate Online that we suggest you add a few more events and continue to explore all of StaffMate Online's other robust features.