

STAFFMATE ONLINE

• Quite simply the most efficient way to schedule YOUR service staff •

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1: StaffMate Overview

What is StaffMate?

StaffMate staff scheduling software is designed specifically for the special events industry to bring speed and efficiency to the chaotic process of event staff scheduling. StaffMate's robust online scheduling service is quite simply the easiest way of scheduling your service staff while maintaining the same powerful administrative tools upon which you have come to rely. From the moment you first enter event details, StaffMate will be saving you more time, energy, resources and headaches than you could have ever imagined. There is no easier way to schedule your service staff!

How Does StaffMate Benefit The Admin?

StaffMate's powerfully intuitive administrative event calendar allows you to:

- Easily manage service staff members and position types
- Efficiently and securely create and manage staffed events with just a few clicks of the mouse
- Automatically and instantly notify all service staff members of new staffing opportunities
- Quickly Create and Publish online staff memos for better staff communication
- And More...

How Does StaffMate Benefit The Service Staff?

StaffMate's graphically-enhanced event calendar allows service staff to:

- Rapidly review staffing commitments & opportunities – 24/7
- Quickly retrieve, review & print vital event information and driving directions - 24/7
- Efficiently schedule additional work commitments – 24/7
- Securely manage their own contact information
- And More...

2: Staff Member Instructions

User Names & Passwords

When you are first entered into StaffMate as an employee, you are automatically assigned a random and unique user name and password. This user name and password, along with detailed instructions, are automatically sent to you via email. **User names and passwords must be at least 5 characters in length and are always case-sensitive**, which means that the user name *StaffMate* is **not** the same as the user names *staffmate* or *STAFFMATE*.

Log In Reminders

If you have forgotten either your user name or password, from the log in screen, click on the link entitled *forgot password?* and enter the email address StaffMate has on record for you. If the email address is located by our database, your user name and password will be immediately sent to that email address. It is strongly recommended that once you receive your user name and password via email that you immediately log in and change your password to protect your privacy.

If you have forgotten your user name and password and the email address you have on file with StaffMate is no longer an email address to which you have access, please call your staffing coordinator for user name and password retrieval.

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The Staff Memo

Once logged in, you will be automatically transported to the staff memo. This memo is created by the administrator as a communication tool. When the StaffMate software is first set up, the staff memo defaults to a welcome statement with instructions on how you can get the most from StaffMate (See illustration below). You can always get to the staff memo again by clicking the Staff Memo tab on your account screen.



[Log Out](#)
[Online How-To Manual](#)
[Contact Staffing Admin](#)

Account Info **Events** **Staff Memo** **Print Reports**

> [Home](#) > [Staff Memo](#) >> [View Staff Memo](#)

Welcome to the StaffMate Catering Company Staffing Section!

Welcome to the StaffMate Catering Company Staffing Section. In this section, you can view upcoming events for which StaffMate Catering Company needs staff members. You can see when and where our upcoming events are taking place, what positions still need to be filled and should the event meet your availability, you can instantly sign up to make yourself eligible to work the event.

Additionally, you have access to a handy, interactive event calendar to keep track of upcoming events and those events for which you have signed up to work. On that calendar (which is on the Events Page), the events that show up in **Red** are the events for which you have signed up. All other events in gray are events for which you are not currently signed up.

To view an event or to sign up for an event, simply click on the title of the event to view the necessary event information:

- Event Title
- Event Date and Times
- Event Location
- Driving Directions
- Staffing Needed.

If your job title is consistent with any of the positions we need, you can sign up for an opportunity instantly by clicking **Sign Up Now!**

Two caveats, once you sign up to make yourself available for an event, your request will be reviewed by the staffing coordinator and either accept or deny your request. Also, once your request has been accepted, the staffing coordinator has made the final decision. Also, once your request has been accepted, you will be asked to contact the staffing coordinator to remove yourself from the list. You will be asked to contact the staffing coordinator to remove yourself from the list.

One additional facet you will notice, on some of the events we make backup positions available. If the position in which you are interested is filled, you can sign up for one of the Backup positions available. This way, if anyone asks to be released of his/her obligation to work the event, you will be among the first contacted to pick up the hours and the extra money.

PLEASE NOTE: You can maintain your own contact information by choosing the **Account Info** tab. Keeping this information current is a necessity. If this is your first time logging in, please visit this Staff Information page to fill in any missing information and to verify the information we have on record for you. Without up-to-date information, you will not be automatically notified of available opportunities and you may not be considered as a fill-in replacement, thus missing out on earning potential.

YET ANOTHER NOTE: In order to keep your information and scheduling as secure as possible, please use the LOGOUT link on the top right hand side of the page to log out each time you are ready to leave the staffing section. If you forget to use the LOGOUT link, please log back in and log out properly. Failure to do so can compromise your information by the next person who uses your computer.

[Continue to Your Staff Calendar](#) ----->

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Staff Memo: The staff memo is the first page each staff member sees upon logging into the StaffMate service. It is a great communication tool to keep your employees informed.

List any upcoming staff meetings, announce company information, give out staff awards and publish the information using the staff memo.

Any way you choose to use it, the staff memo is a simple, yet effective, way to stay in touch with your staff members!

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Staff Member Account Info

Checking Accuracy

With StaffMate, you have the ability to update your own information at will. Update your contact numbers, email address, user name, password and address information as you see fit. Make sure you keep this information up-to-date as this is how the staffing coordinator will contact you regarding staffing opportunities. When logging in for the first time, it is important to check your account info for accuracy. To review and/or update your account info at any time, simply click on the [Account Info](#) tab on the top of the staff member screen.

Making Account Changes

It is very simple to update your account information. From the Account Info screen, simply change any of the information you wish and click the [Modify Your Info](#) button to save the changes.

The First Name, Last Name, User Name and Password are all required fields. These fields must be populated in order to update your Account Information. If any of these fields is blank and you attempt to update your information, an error will occur and the information will not be updated. If this occurs, simply enter the required information and click the [Modify Your Info](#) button to complete the update.

User Names and Passwords must be at least 5 characters in length. If you attempt to update your User Name or Password with entries of less than 5 characters, an error will occur and the information will not be updated. If this occurs, simply enter the information in the required format and click the [Modify Your Info](#) button to complete the update.

** It is strongly recommended that you change your Password every few months to protect your privacy.

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The Event Calendar

You can reach the Event Calendar by clicking on the [Events Tab](#) at any time during your session. The Event Calendar always displays the current day and 30 days in advance. Each upcoming event that has been published to you by the staffing coordinator will appear on your calendar on the day for which it is scheduled.

Event Titles are displayed in two colors. Those displayed in a grayish color are events for which you are NOT scheduled to work. Event Titles displayed in Red are events for which you ARE scheduled to work. To review work opportunities (Grayish) and work commitments (Red), simply click on the Event Title for the event in which you have an interest. This will transport you to that event's screen.

StaffMate online

Event Review: Once they're finished reading the staff memo, your staff members can reach the events calendar simply by clicking on the Events tab.

[Log Out](#)
[Online How-To Manual](#)
[Contact StaffMate](#)

Account Info **Events** **Staff Memo**

> Home > Events >> Calendar View

June 2003 - July 2003 Previous 30 Days | Next 30 Days

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		24	25	26	27	28 Campbell Gradua... Corporate Meet...
29	30	1	2	3	4	5
6	7	8				12
13	14	15				19
20	21	22				

Review Opportunities: Each events calendar is specific to each employee. Only events published to a certain staff member are visible to that employee on their events calendar!

They can simply click on an event title to review event details for any event published to their calendar.

Events they have not yet signed up to work appear in gray. Their work obligations appear in red. Your staff members are never further than a few clicks from their work schedule!

The event calendar always displays the next 31 days in advance of the current date, keeping the calendar current each time they log in.

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Reviewing an Event

The event screen is divided into two sections, the event information section and the staffing section. In the event details section, you will find the event title, event description/special instructions, event date, event start time, event end time, venue location and driving directions. The information provided is dependent upon the information made available by the staffing coordinator when entering the event data, so all information may not be available for all events.

The staffing section provides details on the staffing requirements for the particular event. Each line displays a certain position, the shift times for that position, and the position's disposition. The position disposition can be "Position Available", "Position Filled", "Blocked by Max Hours", "Already Scheduled Today!" or "Sign Up Now!".

StaffMate online

[Log Out](#)
[Online How-To Manual](#)
[Contact StaffMate](#)

Account Info | **Events** | **Staff Memo**

> Home > Events >> [Calendar View](#)

Review Event Details: Here, on the sign up screen, your staff members can review event details, including event times, shift positions and times, venue location and driving directions.

Position Filled: When a shift has already been filled, it is so noted on the sign up screen.

Sign Up Now: Positions for which this employee is qualified show as Sign Up Now, allowing the staff member to request the shift with one click of the mouse. Once the employee requests a shift for this event, it does not allow them to sign up for another.

Not Qualified: Positions for which this employee is not qualified are displayed as Position Available, showing the position but not allowing them to request to work it.

Position	Shift Times	Disposition
Corporate Meeting 06/20/2003 10:00 AM - 12:00 PM Breakfast Buffet for 100 meeting participants. Hyatt on Capital Square 123 State Street Columbus, OH 43215 Take any major Interstate Downtown.		
Service Staff	10:00 AM - 12:00 PM	Position Filled
Service Staff	10:00 AM - 12:00 PM	Position Filled
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Backup Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Backup Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Lead	10:00 AM - 12:00 PM	Position Available

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When a position is marked "**Position Available**", it means that the position in question is not yet filled, but it is a position for which you are not eligible. You may not be eligible for one of two reasons. The first is that you are already scheduled to work that event. The second reason you may not be eligible is that the position type being offered is not one that you are currently listed as qualified to perform. For example, if you are qualified as a Server but not as a Bartender, a Bartender position will be shown to you as "Position Available", but you will not be able to sign up for that position.

When a position is marked "**Position Filled**" or marked with the name of another staff member, that simply means that the position in question is filled. It does not necessarily mean that the work request has or has not been accepted by the Staffing Coordinator (see [Requesting to Work an Event](#), below).

When a position is marked "**Blocked by Max Hours**" it means that signing up for this shift would put you over the Max Weekly Hours the Staffing Coordinator has assigned to your account. For example, if the Staffing Coordinator has assigned you a maximum of 30 hours weekly and you are currently signed up for 25 hours in that particular week, any shift greater than 5 hours in duration will be Blocked by Max Hours.

When a position is marked "**Already Scheduled Today!**", it means that you have already requested to work another event on this same date. You can not automatically sign up for two separate events on the same day. In order to request to work multiple events on the same day, you must contact your staffing coordinator to fulfill your request.

Accepting Admin Placement

From time to time, the staffing coordinator may place you into a shift and seek a reply from you as to whether or not you can work the event. Once the staffing coordinator takes this action, you will be sent an email notifying you of the potential placement. The email will ask that you return to StaffMate, review the event and either accept or reject the work opportunity. You can accept the placement by clicking the Green Checkmark next to the shift with your name. You can reject the placement by clicking the Red X next to the shift. No matter which choice you make, the staffing coordinator will be automatically notified, via email, of your decision.

How To Request Work

When a position is marked "**Sign Up Now!**", you can request the position and shift at any time by simply clicking the "Sign Up Now!" link. This will automatically enter you for the position and shift in question and your name will now appear next to the shift for which you signed up. Also, the event will now be displayed in Red on the Event Calendar page of your account.

How to Request Backup Positions

When backup positions have been made available for an event by the staffing coordinator, you have the option of requesting the backup role to make yourself available to be called on in the event of a call off or no show. Backups ARE NOT scheduled to work a particular event, but are stating their availability in case of an emergency.

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[Log Out](#)
[Online How-To Manual](#)
[Contact StaffMate](#)

Account Info

Events

Staff Memo

[> Home](#) > [Events](#) >> [Calendar View](#)

Review Event Details: Here, on the sign up screen, your staff members can review event details, including event times, shift positions and times, venue location and driving directions.

Corporate Meeting 06/28/2003
10:00 AM - 12:00 PM

Breakfast Buffet for 100 meeting participants.

Hyatt on Capital Square
 123 State Street
 Columbus, OH 43215

Take any major interstate Downtown.

Position Filled: When a shift has already been filled, it is so noted on the sign up screen.

Service Staff	10:00 AM - 12:00 PM	Position Filled
Service Staff	10:00 AM - 12:00 PM	Position Filled
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Backup Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Backup Service Staff	10:00 AM - 12:00 PM	Sign Up Now!
Lead	10:00 AM - 12:00 PM	Position Available

Sign Up Now: Positions for which this employee is qualified show up as Sign Up Now, allowing the staff member to request the shift with one click of the mouse.

Once the employee requests a shift for this event, it does not allow them to sign up for another.

Not Qualified: Positions for which this employee is not qualified are displayed as Position Available, showing the position but not allowing them to request to work it.

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Requesting to Work an Event

When you sign up to work an event, you should remember that you are merely requesting to work the event. As it always has been, it is still ultimately the decision of the Staffing Coordinator of whether to accept your request or not. Many factors go into making the right staffing choices, including the event type, number of guests, special requests and needs of the participants, and the unique mix of experience and qualifications each staff member brings to the team. In some circumstances, these factors will favor you, in yet other circumstances, they may favor another staff member. So please be understanding of the decisions that need to be made by the staffing coordinator when considering your request to work. Whether accepted or not, you will receive an email verification of the decision reached by the Staffing Coordinator.

NOTE: Based upon choices made by your Staffing Coordinator, you may or may not be allowed to electronically and automatically retract a work request once the request has been accepted by the Staffing Coordinator (see [Retracting Work Requests](#), below, for more information).

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Retracting Work Requests

The staffing coordinator has three options when determining how best to manage electronic retraction of work requests. The staffing coordinator can disallow electronic work retractions outright, allow request retractions at any time or allow retractions only prior to staffing coordinator acceptance of your request.

If your Staffing Coordinator has chosen to allow electronic and automatic retraction of work requests at any time, simply go to the Event Screen by clicking on the [Events Tab](#), then click on the [Event Title](#) in question, then click on [Retract Your Work Request](#) to remove yourself from the shift.

If your staffing coordinator has chosen to disallow electronic retraction of work requests, your shift request will be marked "**Commitment Locked**" and you will have to contact your staffing coordinator to be removed from your obligation.

Your staffing coordinator has a third option, to allow electronic and automatic retraction of work requests but only before your request has been accepted. If you have requested to work an event and have not yet been accepted by the staffing coordinator, simply go to the Event Screen by clicking on the [Events Tab](#), then click on the [Event Title](#) in question, then click on [Retract Your Work Request](#) to remove yourself from the shift. Once your request has been accepted, however, it will be marked "**Commitment Locked**" and you will no longer be able to automatically remove yourself from the shift. If you can no longer meet an obligation for which you have already been accepted, you must contact your staffing coordinator to be removed from the shift.

Using Yahoo! by Phone

For a very nominal monthly fee, Yahoo! by Phone allows you to call toll-free from any phone in the U.S. and have your StaffMate notification emails read to you over the phone. If you don't have a computer, access to the Internet or an email account, simply consult with your staffing coordinator for more information about setting up a Yahoo! by Phone account. Yahoo! will provide you with your very own email address and a toll-free number, so anyone, anywhere can send you email that you can then have read to you by phone.

Online User's Manual

You can get to this user manual at any time and from any screen of the StaffMate service by utilizing the [User Manual](#) link in the upper right hand corner of any StaffMate screen.

If, at any time, you have a question about the StaffMate service, please refer to this user manual for the answer. If your question is not answered after reviewing this user manual, contact your staffing coordinator or administrator.

Logging Out

In order to keep your information and scheduling as secure as possible, please use the [LOGOUT](#) link on the upper right hand side of any page to log out each time you are ready to leave the StaffMate service. If you forget to use the LOGOUT link, please log back in and log out properly. Failure to do so can compromise your information by the next person who uses your computer.

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3: Administrator Instructions

User Names & Passwords

When you first enter an employee into StaffMate, they are automatically assigned a random and unique user name and password. This user name and password, along with detailed instructions, are automatically sent to the staff member via email. **User names and passwords must be at least 5 characters in length and are always case-sensitive**, which means that the user name *StaffMate* is **not** the same as the user names *staffmate* or *STAFFMATE*.

Log In Reminders

If you have forgotten either your user name or password, from the log in screen, click on the link entitled *forgot password?* and enter the email address StaffMate has on record for you. If the email address is located by our database, your user name and password will be immediately emailed to that email address. It is strongly recommended that once you receive your user name and password via email that you immediately log in and change your password to protect your privacy.

As an Admin, if you have forgotten your user name and password and the email address you have on file with StaffMate is no longer an email address to which you have access, please call or email StaffMate Support for user name and password retrieval. Email support@staffmate.com or call 1-888-STAFF-411 (1-888-782-3341).

If a staff member calls because they have forgotten their User Name and/or Password and they no longer have access to the email address StaffMate has on record for them, simply update that staff member's email address to one to which they have access and instruct the employee to return to the log in screen, click the *forgot password?* Link and enter the new email address when asked to do so. They will receive their user name and password via email automatically.

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Admin Event Calendar Overview

You can reach the Event Calendar by clicking on the Our Events tab at any time during your session. The Event Calendar always displays the current day and 30 days in advance. Each upcoming event will appear on your calendar on the day for which it is scheduled.

Event Titles are displayed in two colors. Those 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. To review event information and staffing requirements, simply click on the Event Title for the event in which you have an interest.

The screenshot shows the StaffMate Online Admin Event Calendar interface. At the top left is the StaffMate logo. A navigation menu includes: Our Account Info, Our Positions, Our Employees, Our Venues, **Our Events**, Our Staff Memo, and Print Reports. Below the menu is a search bar with the text "Search Events, Staff, or Venues" and a "Submit" button. The calendar displays the month of June 2003, with days of the week and dates. A callout box points to the "Our Events" tab with the text: "Events Screen: To get to the Event Calendar, simply click the Our Events tab". Another callout box points to the "Add Events" link in the menu bar with the text: "Add Events: To add events, simply click the Add Events Link in the menu bar or click on the date to which you wish to add the event. Either way, you will be transported to the Add Events Page for detail entry." A third callout box points to an event title "A22546: Corporate Meeting - 10:00 AM to 12:00 PM" with the text: "Event Display: On dates for which you have scheduled events, the title is displayed. Titles displayed in gray are completely staffed. Events displayed in red still need positions filled." A fourth callout box points to a red event title with the text: "Event Staff Needs: For events in need of additional staffing, those events listed in red, a small pop-up box alerts you to the positions that still need to be filled, just by holding your cursor over the title. This makes staffing progress review easier!". The footer of the page reads "© 2003 StaffMate. All rights reserved."

Line Item View

The Line-Item View shows the same information as the calendar, except in line-item format in order by date for the current day and the next 30 days in advance. From the Our Events tab, simply click the Line-Item link to change the view.

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Our Account Info

The Account Information options and the choices you make here directly impact the operation of your StaffMate service. Therefore, please try to make sure that the information contained within this section is constantly populated and accurate. To get to the Admin Info page, simply click the Our Account Info tab at any time during your session.

[Log Out](#)
[Online How-To Manual](#)
[Contact StaffMate](#)

[Our Account Info](#) | [Our Positions](#) | [Our Employees](#) | [Our Venues](#) | [Our Events](#) | [Our Staff Memo](#) | [Print Reports](#)

> [Admin Home](#) > [Our Account Info](#)

Sunday August 31, 2003 Search Events, Staff, or Venues: 11:27:33am Eastern

Account Information - StaffMate Catering Company

Company Name	StaffMate Catering Company
Mailing Address	4104 Steamtown Road
City, State Zip Code	Ashley Ohio 43003
Telephone Number	740-747-2018
Cellphone Number	
Facsimile Number	
Email Address	support@staffmate.com
Web Site Address	http://www.staffmate.com
SuperAdmin First Name - Last Name	Staffing Coordinator
SuperAdmin Email	support@staffmate.com
When a position is filled, make the staff member name visible to all other staff members?	<input checked="" type="radio"/> Show "Position Filled" <input type="radio"/> Show Staff Name
Send Reminders to All with Admin Access or Just The Above Super Admin?	<input checked="" type="radio"/> All Admins? <input type="radio"/> Just SuperAdmin?
Default Max Weekly Staff Hours	30
Your Pay/Work Week Starts on...	Monday

The work request process flows as follows: 1) Staff Member requests to work an event, 2) Coordinator Accepts or Rejects the work request, and 3) If accepted, the Staff Member is committed to work the event.

However, you can allow Staff Members to electronically retract work requests...

- Never, they must call for administrative removal.
- Only prior to coordinator acceptance of the request.
- Anytime, even after request acceptance.

Overview: Use the tabs to navigate StaffMate. Use the Search box to quickly locate Events, Venues or Staff.

Setup: Review the information contained on the Account Info page. Make sure all info is correct, make changes as necessary and click Update Admin Info to save changes.

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Key Fields

Here is how choices you make in the Account Info section impact the StaffMate service:

Company Name - The company name you enter here is the company name used as the tagline to all emails sent out of the StaffMate service.

Telephone Number - The telephone number you enter here is the telephone number used in various places throughout the StaffMate service, including work notification and reminder emails, as the central contact number for staff members to contact you.

SuperAdmin Name - The name entered here is the name that appears throughout the service, including in the tagline of all staffing emails.

SuperAdmin Email - This is the email address used as the Reply-to email address on all staff correspondence generated by the StaffMate service. It is also the email address used as the "Contact Staffing Admin" email address link on all of the Staff Member Pages.

StaffMate Software Options

Position Filled Option - For privacy reasons, we have given you the option of whether to show the names of staff members scheduled to work any given event to other staff members viewing the event information. By choosing "Show Position Filled", staff members will only be able to see the words "Position Filled" in a filled shift slot. By choosing "Show Staff Name", each staff member will be able to see the names of the other staff members scheduled to work that event.

Reminders - Approximately 4-5 days prior to each event, the StaffMate service automatically generates an **ADMIN** reminder email to urge you to finalize staffing plans for the event. You can choose to have that email generated only to the SuperAdmin or to the SuperAdmin AND each person upon which you have bestowed full administrative access.

Staff Max Hours and Pay Week - The StaffMate service allows staff members in any given work week to sign up for no more than the Max Hours you have entered for that staff member. Staff members for which you have not entered Max Hours will instead be limited by the Default Max Weekly Staff Hours you enter here on the Account Information page. The Start of the Pay/Work Week allows the StaffMate service to know the start day upon which to base the Max Hours.

Work Request Retractions - As the administrator, you have the ability to control if and when staff members can electronically and automatically retract their request to work an event. The options are as follows:

You may choose to disallow electronic retractions of work requests in all circumstances. Therefore, in order to retract a request, the staff member must contact you directly to be removed from their work request.

You may choose to allow electronic and automatic retraction of work requests but only before a staff member's request has been accepted by you. If the staff member requested to work an event and has not yet been accepted by you, he or she can simply go to the Event Screen by clicking on the Events Tab, then click on the Event Title in question, then click on Retract Your Work Request to remove themselves from the shift.

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However, if the staff member can no longer meet an obligation for which they have already been accepted, they must contact you directly to be removed from their obligation to work.

Lastly, you may choose to allow all electronic and automatic retractions of work requests. In that case, the staff member would simply go to the Event Screen by clicking on the Events Tab, then click on the Event Title in question, then click on Retract Your Work Request to remove themselves from the shift.

Our Positions

The screenshot shows the StaffMate online interface. At the top, there is a navigation bar with tabs: "Our Account Info", "Our Positions", "Our Employees", "Our Venues", "Our Events", "Our Staff Memo", and "Print Reports". The "Our Positions" tab is selected. Below the navigation bar, there is a search bar with the text "Search Events, Staff, or Venues: EVENT# or KEYWORD" and a "Submit" button. The date "Saturday August 16, 2003" and the time "7:06:43am Eastern" are displayed. The main content area is titled "Email, Modify and/or Delete a Position!". It contains a table with five rows, each representing a position type: Bartender, Coordinator, Grill Cook, Lead, and Service Staff. Each row has a checkbox, a "Modify Position" button, and a "delete position?" link. A callout box points to the "Our Positions" tab, stating: "Positions: To add, modify or delete positions, simply click the Our Positions tab on the top of the page." Another callout box points to the "delete position?" link, stating: "Delete Positions: To delete a position, simply click the delete position link next to the position you wish to delete." A third callout box points to the "Modify Position" button, stating: "Modify Positions: Titles of positions can be modified at will. Simply update the title to a new title of your choice and click Modify Position on that line." A fourth callout box points to the "Add Position" button, stating: "Add a Position: To add a position, enter a title in the Position Title box and click the Add Position button to save the addition." Below the table, there is a section titled "Add a Position!" with a "Position Title:" input field and an "Add Position" button. At the bottom of the page, there is a copyright notice: "© 2003 StaffMate. All rights reserved."

Adding and Modifying Positions

To add a position type, click on the Our Positions tab and seek out the "Add a Position!" section of the page. Simply type a Position Title and click the Add Position button. The new position type is now available to assign to staff members and to staff events with.

To modify a position type, click on the Our Positions tab and seek out the "Modify or Delete a Position!" section of the page. Simply modify the Position Title and click the Modify Position button on the line of the updated position. The position title will automatically and instantly update throughout your StaffMate service. You can change only one position title at a time.

Deleting Positions

To delete a position, click on the Our Positions tab and seek out the Position Title you wish to delete. Click the delete position? link on the line associated with the particular position title. On the subsequent page, it will ask you to confirm your intent to delete the position. If you really want to delete the position, click Yes, I'd Like To Delete This Position!. If you do not want to delete the position, click on NO, I Do Not Want To Delete This Position! and this will take you back to the main positions page without deleting the position title.

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Deleting a position title does not automatically alter event staffing positions. For example, you have an event for which you need 10 servers. Five of the 10 shifts are filled. You choose to delete the server position. The Server position will no longer be available to newly added events and you will no longer be able to assign the position title to newly added employees. However the event for which you needed 10 servers still shows the 5 filled and 5 vacant server positions and all of the existing employees with the server position tied to them still have the ability to sign up for those spots.

Only once there are no longer any events which involve the server position and there are no longer any staff members with the server position classification will the server position be permanently removed from the database.

Emailing Position Types

You can email staff members based upon their position title. Start by clicking on the [Our Positions](#) tab. From there, click on the [email graphic](#) associated with the title of the position you wish to email. On the subsequent page, enter a subject and message text for the email you wish to send and click on the [Send This Message](#) button to send the emails. All staff members which have been assigned that particular position will be instantly and automatically emailed the message you entered.

Our Employees

Email Communication with Employees

There are additional ways to send email to employees, three of which are discussed in this section. You can choose to email an individual staff member, one email, one recipient; you may choose to email staff members selectively, one email, selected, multiple recipients; or you may choose to broadcast an email to all staff members, one email, all recipients.

Individually - Start by clicking on the [Our Employees](#) tab. From there, click on the [email graphic](#) associated with the name of the employee you wish to email. On the subsequent page, enter a subject and message text for the email you wish to send and click on the [Send This Message](#) button to send the email to that particular employee instantly and automatically.

Selectively - Start by clicking on the [Our Employees](#) tab. From there, click on the [Broadcast an Email to SELECTED Staff Members](#) link at the bottom of the Our Employees page. On the subsequent page, enter a subject and message text for the email you wish to send. Below the email entry area, in the section entitled "Selectively Email To", select to which staff members you wish to send this email and click on the [Send This Message](#) button to instantly and automatically send the email to only those staff members you selected.

Broadcast to All - Start by clicking on the [Our Employees](#) tab. From there, click on the [Broadcast an Email to ALL Staff Members](#) link at the bottom of the Our Employees page. On the subsequent page, enter a subject and message text for the email you wish to send and click on the [Send This Message](#) button to instantly and automatically send the email to each and every staff member.

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StaffMate online [Log Out](#)
[Online How-To Manual](#)
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Our Account Info **Our Positions** **Our Employees** **Our Venues** **Our Events** **Our Staff Memo** **Print Reports**

> [Admin Home](#) > [Our Employees](#) >> [Add Employees](#) -- [Manage Employees](#)

Saturday August 16, 2003 Search Events, Staff, or Venues: EVENT# or KEYWORD 6:17:34pm Eastern

Manage Your Employees

<input type="checkbox"/> Mod: Boop, Betty del?	<input type="checkbox"/> Mod: Coordinator, Staffing del?	<input type="checkbox"/> Mod: Flintstone, Wilma del?	<input type="checkbox"/> Mod: Jetson, Judy del?
<input type="checkbox"/> Mod: Sprat, Jack del?	<input type="checkbox"/> Mod: Squarepants, Spongebob del?	<input type="checkbox"/> Mod: Thumb, Tom del?	

Broadcast an Email to [All Staff Members!](#) or [SELECTED Staff Members!](#)

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Email Individual: To email individual staff members, simply click the email graphic next to that employees name. This will bring you to the email entry screen.

Selective Email: To email selected staff members, simply click the SELECTED Staff Members link, which will transport you to the selective email entry screen, shown below, which allows you to enter the email subject, text and choose to which staff members you wish to send email.

Broadcast Email: To broadcast an email to all staff members, simply click the Broadcast an Email to All Staff Members link, which will transport you to the email entry screen.

Email Staff: From the Selective Email Entry Screen, simply enter a Subject and Message Text, choose to which staff members you wish to send the email and click Submit to transmit the email.

Email Contents:

Email Subject:

Email Message:

Selectively Email To:

<input type="checkbox"/> Betty Boop	<input type="checkbox"/> Staffing Coordinator	<input type="checkbox"/> Wilma Flintstone	<input type="checkbox"/> Judy Jetson
<input type="checkbox"/> Jack Sprat	<input type="checkbox"/> Spongebob Squarepants	<input type="checkbox"/> Tom Thumb	

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The screenshot shows the StaffMate online interface. At the top left is the logo "StaffMate online". A navigation menu includes "Our Account Info", "Our Positions", "Our Employees", "Our Venues", "Our Events", "Our Staff Memo", and "Print Reports". The "Our Employees" tab is selected, showing a breadcrumb trail: "> Admin Home > Our Employees >> Add Employees -- Manage Employees". Below this is a search bar for "EVENT# or KEYWORD" and a "Submit" button. The date "Saturday August 16, 2003" and time "7:30:35pm Eastern" are displayed. The main content area is titled "Manage Your Employees" and contains a table of staff members. Each row includes a name, a "del?" link, and a "Mod:" link. A "Broadcast an Email to" section is visible below the table. Three yellow callout boxes with green arrows provide instructions: 1. "Employees: To add, modify or delete employees, first click on the Our Employees tab to reach the Employee Management screen. Then..." points to the "Our Employees" tab. 2. "Add Employees: From the employee management screen, click the Add Employees link to proceed to the Add Employee Screen (Below)." points to the "Add Employees" link in the breadcrumb. 3. "Modify Employees: Click on a name to modify information for that staff member on the Modify Employee Screen." points to the "Mod:" link for "Jethro, Judy".

StaffMate online

Our Account Info Our Positions **Our Employees** Our Venues Our Events Our Staff Memo Print Reports

> Admin Home > Our Employees >> Add Employees -- Manage Employees

Saturday August 16, 2003 Search Events, Staff, or Venues: EVENT# or KEYWORD Submit 7:30:35pm Eastern

Manage Your Employees

Add Employees: From the employee management screen, click the Add Employees link to proceed to the Add Employee Screen (Below).

Employees: To add, modify or delete employees, first click on the Our Employees tab to reach the Employee Management screen. Then...

Modify Employees: Click on a name to modify information for that staff member on the Modify Employee Screen.

Broadcast an Email to ALL Staff Members! or

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Deleting Employees

To delete employees, click on the *Our Employees* tab and click on the *del?* link associated with the name of the staff member you wish to delete. On the next screen, the StaffMate service will ask for you to confirm your intent to delete this employee. If you really want to delete the staff member, click *Yes, I'd Like To Delete This Staff Member!*. If you do not want to delete the staff member, click on *NO, I Do Not Want To Delete This Staff Member!* and this will take you back to the main employee page without deleting the staff member.

Although the staff member's name will still be listed in reports detailing past events for which they were scheduled, once deleted, the employee will be instantly and automatically removed from all future events for which they are scheduled and they will no longer be able to log into StaffMate.

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Adding New Employees

To add employees, click on the Our Employees tab, then click on the Add Employees link in the navigation bar below the tabs. Simply fill in the fields and click the Add Staff Member button. It's that simple.

Required Fields - The First Name and Last Name are required fields. These fields must be populated in order to add the staff member. If any of these fields is blank and you attempt to add the information, an error will occur and the staff member will not be added. If this occurs, simply enter the required information and click Add Staff Member to complete the update.

User Names & Passwords - When adding an employee, the initial User Name and Password are self-generated and emailed, with a welcome statement, directly to the new staff member. When adding an employee without an email address, you can simply add the email address later, which will automatically generate the welcome email with User Name and Password.

STAFFMATE ONLINE

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Email & Phone Importance - Although these fields are not required, they are important means of communication to your employees, so it is in your best interest to enter this information and to verify that the information is correct before adding the employee. Also, if you choose to add employees without first securing their email address, please be advised that the employee will not initially receive the welcome email, with their User Name, Password and Service Instructions. If you add the email address later, the welcome email with User Name, Password and Service Instructions will be generated at that time.

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

Employee Levels - Employees can be separated by up to 5 "Levels" based upon any criteria you wish to use. For example, the levels can be associated with performance, pay grades, seniority, etc. How you use the Levels is up to you. The Employee Levels feature offers great administrative benefits! When you choose to publish event information to your staff members, 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. Staff Members on hiatus will not receive any email correspondence from the StaffMate service, 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 event calendar.

Admin Access - If you choose to give Full Admin Access to any employee, they will have the same access and privileges as you do. For example, give Admin Access to your Event Planners so they can print their own Staff Reports, manage the staffing of their own events, etc. If you choose to give Staff & Fill In Report Access to an employee, along with their ability to sign up to work events, they will also have the ability to print Staff Reports and Fill In Reports for events. This is especially useful for Captains or Leads. You may not want to give them Full Admin Access but you may want them to print the Staff Reports and manage event day staff issues.

Staff Positions - By assigning positions to staff members, you are giving them the ability to work positions of that particular type. For example, by assigning the Bartender position to an employee, you are giving them access to sign up for Bartender positions for any given event.

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Updating Employee Information

To modify employee information, click on the Our Employees tab, then click on the name of the employee whose information you wish to modify.

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Our Account Info **Our Positions** **Our Employees** **Our Venues** **Our Events** **Our Staff Memo** **Print Reports**

> [Admin Home](#) > [Our Employees](#) >> [Add Employees](#) -- [Manage Employees](#)

Monday August 18, 2003 **Search Events, Staff, or Venues:** EVENT# or KEYWORD

Modify Spongebob Squarepants!

Modify Employee Info: Update the employee details. First and Last Name are required fields.

Max Hours: Max Hours are the total number of hours per week for which this employee is allowed to sign up, limiting staff hours.

Levels: You can define each staff member from Level 1 to Level 5. Levels can stand for anything you wish, seniority, performance, pay grade. There is also an "On Haitus" level for employees on leave.

Admin Access: Provide Admin Access to any employee you wish by choosing Full Admin Access or Report Access Only. Full access gives full privileges, report access allows employee to print Staff & Fill-In reports only.

Staff Positions: Choose each position type for which this employee is qualified. Staff Members can only sign up for positions for which they are qualified, signified by selections in this field.

Submit the Info: When you are finished updating the information for this employee, click the Modify Staff Info button to save the info.

Form Fields:

- First Name: Spongebob
- Last Name: Squarepants
- Employee ID Number: 775533
- Start Date: [Dropdown]
- Address: 100 Pineapple Ave
- Address Line 2: [Empty]
- City: Bikini Bottom
- State: Ohio [Dropdown]
- Zip Code: 43003
- User Name (5-10 Char): ss3421329
- Password (5-10 Char): [Empty]
- Email Address: submit@istaffpro.com
- Phone Number: 740-726-2008
- Cell Phone: [Empty]
- Pager: [Empty]
- Fax Number: [Empty]
- Max Hours: 30
- Employee Level: Level 1 [Dropdown]
- Full Admin Access:
- Staff & Fill In Report Access Only:
- No Admin Access:
- Bartender:
- Coordinator:
- Grill Cook:
- Lead:
- Service Staff:

Required Fields - The First Name, Last Name, User Name and Password are all required fields. These fields must be populated in order to update the staff member's Account Information. If any of these fields is blank and you attempt to update the information, an error will occur and the information will not be updated. If this occurs, simply enter the required information and click Modify Staff Info to complete the update.

User Names & Passwords - User Names and Passwords must be at least 5 characters in length. If you attempt to update a User Name or Password with entries of less than 5 characters, an error will occur and the information will not be updated. If this occurs, simply enter the information in the required format and click Modify Staff Info to complete the update. It is strongly recommended that you and your staff members change your Passwords every few months to protect your account privacy.

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Email & Phone Importance - Although these fields are not required, they are important means of communication to your employees, so it is in your best interest to enter this information and to verify that the information is correct before updating the employee.

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

Employee Levels - Employees can be separated by up to 5 "Levels" based upon any criteria you wish to use. For example, the levels can be associated with performance, pay grades, seniority, etc. How you use the Levels is up to you. The Employee Levels feature offers great administrative benefits! When you choose to publish event information to your staff members, 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. Staff Members on hiatus will not receive any email correspondence from the StaffMate service, 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 event calendar.

Admin Access - If you choose to give Full Admin Access to any employee, they will have the same access and privileges as you do. For example, give Admin Access to your Event Planners so they can print their own Staff Reports, manage the staffing of their own events, etc. If you choose to give Staff & Fill In Report Access to an employee, along with their ability to sign up to work events, they will also have the ability to print Staff Reports and Fill In Reports for events. This is especially useful for Captains or Leads. You may not want to give them Full Admin Access but you may want them to print the Staff Reports and manage event day staff issues.

Staff Positions - By assigning positions to staff members, you are giving them the ability to work positions of that particular type. For example, by assigning the Bartender position to an employee, you are giving them access to sign up for Bartender positions for any given event.

STAFFMATE ONLINE

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Our Venues

StaffMate online

Our Account Info | Our Positions | Our Employees | **Our Venues** | Our Events | Our Staff Memo | Print Reports

> Admin Home > Our Venues >> Add Venues -- Manage Venues

Saturday August 16, 2003 Search Events, Staff, or Venues: EVENT# or KEYWORD Submit 5:07:29pm Eastern

Manage Your Venues

Mod: [Hutton Capital Square, Columbus](#) [del?](#)

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Venues: To add, modify or delete venues, first click on the Our Venues tab to reach the Venue Management screen. Then...

Modify Venues: Click on a venue name to modify information for that venue on the Modify Venue Screen.

Add Venues: From the venue management screen, click the Add Venues link to proceed to the Add Venue Screen (Below).

Emailing Venues

You can easily and instantly email venue contacts. Start by clicking on the [Our Venues](#) tab. From there, click on the email graphic associated with the venue whose contact you wish to email. On the subsequent page, enter a subject and message text for the email you wish to send and click on the [Send This Message](#) button to send the email. The contact for the chosen venue will be instantly emailed the message you entered.

Deleting Venues

To delete a favorite venue, click on the [Our Venues](#) tab and click on the [del?](#) link associated with the venue you wish to delete. On the next screen, the StaffMate service will ask for you to confirm your intent to delete this venue. If you really want to delete the venue, click [Yes, I'd Like To Delete This Venue!](#). If you do not want to delete the venue, click on [NO, I Do Not Want To Delete This Venue!](#) and this will take you back to the main venue page without deleting the venue.

Updating Venues

To modify a favorite venue, click on the [Our Venues](#) tab and then on the title of the venue you wish to update. Change or add the information you wish to for the venue and click the [Modify Venue](#) button to record the updates.

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Adding New Venues

There are two ways to add venues to your favorites, either directly or through the event addition process. To add a venue directly, click on the [Our Venues](#) tab and then click on [Add Venues](#) on the navigation bar below the tabs. Here, simply enter the information requested and click the [Add Venue](#) button.

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[Our Account Info](#) [Our Positions](#) [Our Employees](#) [Our Venues](#) [Our Events](#) [Our Staff Memo](#) [Print Reports](#)

> [Admin Home](#) > [Our Venues](#) >> [Add Venues](#) - [Manage Venues](#)

Monday June 23, 2003 Search Events, Staff, or Venues: 7:50:25am Eastern

Add New Venue

Venue Name:

Address:

Address 2:

City:

State:

Zip Code:

Venue Contact Person:

Venue Phone:

Venue Email:

Directions:

Add New Venues: Adding favorite venues allows you to store your most frequently used venues for easy use when entering event details.

Save Venue Contact Info for easy communication and coordination with the venue staff.

Enter driving directions once and each time you use this venue, the directions are automatically made available to your staff members.

When finished, click the Add Venue button to save.

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As part of the event addition process, simply enter the requested information in the Venue section of the Event Addition Screen, check the box entitled **Save New Venue?** and complete the event addition process as normal. This will add the new venue to your favorite venues. More information regarding the event addition process is available in the **Event Staffing Process** section below. See [Entering Venue Info](#) within the [Overview of Adding Events](#) section below for more information about saving favorite venues through the event addition process.

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Our Staff Memo

To review the staff memo, click on the [Our Staff Memo](#) tab. This is the staff memo as it appears to each staff member each time they log into the StaffMate service. Use the staff memo as one additional communication tool to notify employees of upcoming staff meetings, announce company information, recognize outstanding staff member performance, etc.

Updating the Staff Memo

To update the staff memo, click on the [Our Staff Memo](#) tab then on the [Update Staff Memo](#) link in the navigation bar below the tabs. Make the changes you wish to make and click on the [Modify Memo](#) button to record the updates. The new memo will instantly and automatically display for each staff member the next time they log into the StaffMate service.

StaffMate online [Log Out](#)
[Online How-To Manual](#)
[Contact StaffMate](#)

Our Account Info **Our Positions** **Our Employees** **Our Venues** **Our Events** **Our Staff Memo** **Print Reports**

> [Admin Home](#) > [Our Staff Memo](#) >> [View Staff Memo](#) -- [Update Staff Memo](#)

Saturday August 16, 2003 **Search Events, Staff, or Venues:** 5:14:46pm Eastern

Memo Title: Welcome to the StaffMate Catering Compan

Memo Text: Welcome to the StaffMate Catering Company Staff you can view upcoming events for which StaffMate members. You can see when and where our upcoming positions still need to be filled and should be filled. you can instantly sign up to make yourself eligible.

Additionally, you have access to a handy, interactive track of upcoming events. These events for work. On that calendar, click on the Event in Red the events in gray are other events in gray are which you

To view an event or to sign up for an event, click on the event directly on your calendar. The page displays necessary event information:

Event Title
Event Date and Times
Event Location
Driving Directions
Staffing Needed.

If your job title is consistent with any of the positions we need, you will be given the opportunity to sign up for the available staffing opportunity instantly by clicking Sign Up Now!

Update Staff Memo: The staff memo is the first page each staff member sees upon logging into the StaffMate service. It is a great communication tool to keep your employees informed.

List any upcoming staff meetings, announce company information, give out staff awards and publish the information using the staff memo.

Any way you choose to use it, the staff memo is a simple, yet effective, way to stay in touch with your staff members!

To update the memo, simply change the Memo Title and Memo Text to what you would like the memo to say, then click the Modify Memo button.

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Basic HTML Options

You can use HTML coding to spice up the look of the memo. If using HTML coding, do not use quotation marks or single quotation marks in the coding. It will not work properly. You can use quotation marks in the normal text, but not in HTML coding.

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4: Event Staffing Process

You can reach the Event Calendar by clicking on the Our Events tab at any time during your session. The Event Calendar always displays the current day and 30 days in advance. Each upcoming event will appear on your calendar on the day for which it is scheduled. Event Titles are displayed in two colors. Those 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. To review event information and staffing requirements, simply click on the Event Title for the event in which you have an interest.

The screenshot shows the StaffMate Online interface. At the top left is the StaffMate logo. A navigation bar contains tabs: Our Account Info, Our Positions, Our Employees, Our Venues, Our Events (selected), Our Staff Memo, and Print Reports. Below the navigation bar is a search bar with the text 'Search Events, Staff, or Venues' and a 'Submit' button. The main area is a calendar for June 2003 to July 2003. A callout box points to the 'Our Events' tab: 'Events Screen: To get to the Event Calendar, simply click the Our Events tab'. Another callout points to the 'Add Events' link in the navigation bar: 'Add Events: To add events, simply click the Add Events Link in the menu bar or click on the date to which you wish to add the event. Either way, you will be transported to the Add Events Page for detail entry.' A third callout points to an event title 'A22546: Corporate Meeting - 10:00 AM to 12:00 PM' which is displayed in red: 'Event Display: On dates for which you have scheduled events, the title is displayed. Titles displayed in gray are completely staffed. Events displayed in red still need positions filled.' A fourth callout points to a pop-up box for the event: 'Event Staff Needs: For events in need of additional staffing, those events listed in red, a small pop-up box alerts you to the positions that still need to be filled, just by holding your cursor over the title. This makes staffing progress review easier!'. The footer of the page reads '© 2003 StaffMate. All rights reserved.'

Overview of Adding Events

Each event is made up of three distinct parts, event information, venue information and staffing requirements. Each is described in detail below.


Select Date or Click Add Events

There are two different ways to initiate the event addition process. The easiest way is to click on the date to which you wish to add the event on your Event Calendar. This method will automatically populate the date field on the event addition screen. You may also start the event addition process by clicking on Add Events link in the navigation bar below the tabs on the Event Calendar screen.

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Entering Event Details



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[Online How-To Manual](#)
[Contact StaffMate](#)

Our Account Info Our Positions Our Employees Our Venues **Our Events** Our Staff Memo Print Reports

> Admin Home > Our Events >> Calendar View -- Line-Item View -- Add Events

Monday June 23, 2003Search Events, Staff, or Venues: 6:44:19pm Eastern

Add New Event

Event Info

Event Number:

Event Title:

Description:

Event Date: 07/15/2003

Start Time: : :

End Time: : :

Event Venue

Choose Venue:

OR Enter New Venue:

Save New Venue? YES, Add this Venue to our Favorites.

Address:

Address 2:

City:

State:

Zip Code:

Venue Contact Person:

Venue Phone:

Venue Email:

Directions:

Add Event Info: Adding an event is a two step process. The first step involves entering event info. The second step, discussed below, involves entering staffing requirements.

The Event Number is the number by which the event is classified in your catering program.

Event Description can include details you wish to make available to your staff, like type of event, which uniform to wear and where to meet.

Start and End times are event start and end times, not shift times.

Entering Venue Info: When entering an event, you can signify the event venue by either choosing a venue from your favorite venues **OR** by adding a new venue in the spaces provided.

Should this be a venue you wish to save as a favorite, simply click the checkbox Yes, Add this Venue to our Favorites.

Adding Event Info: When you are done entering event details, click the Add Event button to proceed to the entering staff requirements screen.

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Event Title - 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 Description - 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 Date - If you clicked on a date from the Event Calendar, the Event Date field will be automatically populated with the date upon which you clicked. If you reached the add event screen by choosing "Add Event" from the navigation bar below the tabs, you will have to provide the Event Date.

Start Time & End Time - The Event Start Time & Event End Time fields are the start time and end time of the event, not necessarily the shifts within that event.

Entering Venue Details

Choose Venue - If you currently have venues saved in your Favorite Venues, these options will be provided to you here. If you choose a favorite venue, you will not fill in the rest of the venue information as these fields will be automatically entered into the event when you click on the [Add Event](#) button.

Enter New Venue - If you do not have any Favorite Venues or wish to use a venue you have not saved as a Favorite Venue, you will complete the remainder of the Event Venue section, starting with the Enter New Venue field where you will enter the name of the venue. For example, "Anytown Convention Center".

Save New Venue? - Checking this box will allow you to save the new venue you are entering into your Favorite Venues for easy use with future events. If you choose this option, the next event you enter will include this new venue in the Choose Venue drop-down list.

Address Information - Enter the venue address in the address fields.

Venue Contact Person - Enter the name of the venue contact person for your reference.

Venue Phone - Enter the phone number of the venue for your reference.

Venue Email - Enter the email address of the venue contact person for your reference.

Driving Directions - Here, you have some options. You can enter driving directions from your location, or more generalized directions from different starting points throughout your town. For example, "From the North Side...", "From the East Side...", etc. Be as detailed as you see fit, but the more detailed you are, the better the chances are that your staff members will not get lost. Also, these driving directions may be printed by your staff members to bring to the event with them.

Entering Staffing Requirements

Once you are finished entering the Event Info and the Event Venue information, simply click the [Add Event](#) button at the bottom of the form. This will add the event to your StaffMate service and take you to the Add Event Positions screen. Now that you have added the event, you must tell the StaffMate service how many of each employee type you need and at what times.

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Our Account Info **Our Positions** **Our Employees** **Our Venues** **Our Events** **Our Staff Memo** **Print Reports**

> Admin Home > Our Events >> Calendar View -- Line-Item View -- Add Events

Monday June 23, 2003 Search Events, Staff, or Venues: EVENT# or KEYWORD 7:49:52am Eastern

Add New Event

Add Positions: Now that you have entered event details, it is time to enter staffing needs into StaffMate. Choose the position type, the shift times and the number of staff needed, then click Add Event Position button.

Current Positions for this Event!
Lead: 1
Service Staff: 10
[Position Update Completed? Click Here.](#)

Add Jobs to an Event!

Position Title:
Start Time:
End Time:
Number of Staff Needed:
Number of Backups Desired:

Finish Adding: Once you add a position type a rolling total appears here. Continue adding positions as instructed to the left, until all jobs and shifts are added.

When you're finished, click the link entitled Position Update Completed? Click Here.

This will take you to the event management screen for this newly created event.

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Position Title - 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 **Our Positions** section of the StaffMate service.

Shift Start & End Times - 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 service.

Number of Staff Needed - Enter the number of this particular staff type you need for this particular shift here. For example, if you have chosen the Server position type with shift times of 7pm to 9pm, enter only the number of servers you need for this particular shift. If you need additional servers from 9pm to 11pm, you will enter those as a separate staffing need.

Number of Backups Desired - Backups allow you to take additional staff members who are willing to be on call the date of the event just in case the need arises. Enter the number of backups of this particular staff type you are willing to accept for this particular shift in this field. Backups ARE NOT scheduled to work a particular event, but are included on your Staff Report to call on in case of an emergency.

Add Event Position - Click the [Add Event Position](#) button to add the staffing need to the StaffMate service for this event. This will add the staffing need and return you to the Add Event Position screen to add additional position needs. Keep entering positions and shifts until your staffing needs are appropriately represented for this event within the StaffMate service.

Position Update Completed? Click Here - Once you have entered all necessary staff for this event, click the link entitled [Position Update Completed? Click Here](#). This will finalize your staffing needs for this event and return you to the Event screen showing you the information you just entered so you can check your new entry.

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Publishing an Event

Once you have entered an event, the event needs to be published to your staff members. Publishing means notifying your staff of the work opportunity. When published to, staff members are notified of the new event via email and via their own personal online schedule calendar. Once published to an employee, the event becomes visible to that staff member on their event calendar. If an event has not been published to a particular staff member, that employee will neither receive email notification nor be able to see the particular event on their event calendar.

Publishing Options

From the Events Calendar or the Line-Item View, click on the Event Title you wish to publish. There you will see the event information for that particular event. On the top left of the event screen, you will see graphical links representing your publishing options

ALL 1 2 3 4 5 SEL REP

If you have previously published the event, the StaffMate service will alert you to whom you have already published the event with a green checkmark over the appropriate graphic. Since you can republish as often as you wish, the REP graphic will not ever have a checkmark or become deactivated.

ALL 1 2 3 4 5 SEL REP

Keeping an Event Private - You may choose not to publish an event if, for example, you have an event you wish to staff privately by phone or if you already know who you want to work the event. Even though these events are never openly published, once you manually add a staff member to a shift within the event, the event becomes visible on only that staff member's calendar and they will receive all email notifications and reminders as they normally would for any work obligation.

Publishing Selectively - You can publish an event Selectively (SEL Button). When you click this button, you will be presented with a listing of all employees who are qualified to work the positions you have made available for this event and who are not "On Hiatus". Those to whom you have already published this event are represented with a blocked-out checkbox. Those to whom you have yet to publish the event will have an empty checkbox next to their names. Simply choose those staff members to whom you wish to publish the event and click Submit. This will publish the event info to only the staff members you check marked!

Publishing to Levels - If you wish to publish this event to a particular Staff Level, simply click the number of the Level to which you wish to publish. This will post the event to the Event Calendars of **every** member of that Level. It will also send email notices, but only to the staff members within the chosen level that are qualified to work positions you made available for this event. In other words, everyone within that level will be able to view the event on their calendar, but only those who share position titles with those positions needed for staffing the event will be notified of the work opportunity via email.


Broadcast Publishing - If you wish to publish this event to All (or All Remaining) Staff, simply click the ALL graphic. This will post the event to the Event Calendars of **every** staff member not previously notified of the event. It will also send email notices, but only to the staff members that are qualified to work positions you made available for this event.

Republishing Events

At times, you may find that certain events are nearing Event Day and not completely filled. Simply click the REP image and the event will be republished to those staff members to which you have already published the event, automatically sending each such employee a reminder of the event and asking them to recheck their availability and sign-up to work the event, if possible.

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Grayed Out Levels: Levels that have been grayed out are levels within which there are no staff members yet.

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> Admin Home > Our Events >> Calendar View -- Line-Item View

Tuesday June 24, 2003 Search Events, Staff, or Venues

ALL 2 3 4 5 SEL REP

Event: Campbell Graduation - Up Event Info

Venue: Campbell Home
4104 Steadman Road
Ashley, OH 43015
740-747-2018

Staffing Requirements

Position Type	Shift Times	Staff Members
Service Staff	01:00 PM - 03:00 PM	Wilma Flintstone
Grill Cook	12:00 PM - 03:00 PM	Tom Thumb

Event Date: 6/28/2003 Event Times: 1:00 PM-3:00 PM

Event Location: Campbell Home

Republishing Events: Select REP to republish the event to previously published-to staff members. Use this option to fully staff difficult-to-staff events. This option sends a Last Chance email to staff members, letting them know there are still positions available for this event.

✓ or ✗

Publish to All: This is the easiest and quickest way to publish an event and is used when it is more important to fully staff an event than it is to staff it selectively.

To publish an event to all staff members, simply click the ALL graphic. An email notification of the new work opportunity is sent to all employees qualified to work this event's positions and the event becomes viewable on the calendars of all staff.

If already published in any other manner, choosing ALL will publish the event to all remaining staff members!

Publish to Levels: Levels are anything you want them to be and are used to classify employees. Use levels to separate staff members by seniority, performance, or pay grade.


Publishing to a particular level will do just as it sounds, send email notification to all staff that have been placed by you into that level. The event also becomes viewable by all level members on their calendars.

Looking at the graphic above, you can see that this event has already been published to Level 1 staff.

Publish Selectively: This method allows you to hand select certain staff members to which you wish to publish an event. By choosing the SEL option above, you will be transported to the Selective Publishing page, below.

Only staff members qualified to work positions you made available for this event will be available for selective publishing.

On this page, staff members previously published to will be designated with a disabled checkbox. Select new staff members to which you wish to publish the event and click Submit.



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> Admin Home > Our Events >> Calendar View -- Line-Item View

Tuesday June 24, 2003 Search Events, Staff, or Venues

Event Date: 6/28/2003 Event Times: 1:00 PM-3:00 PM

Event Location: Campbell Home

Selectively Publish To:

<input type="checkbox"/> Betty Boop	<input type="checkbox"/> Staffing Coordinator	<input checked="" type="checkbox"/> Wilma Flintstone	<input type="checkbox"/> Judy Jetson
<input type="checkbox"/> Jack Sprat	<input checked="" type="checkbox"/> Tom Thumb	<input checked="" type="checkbox"/> Joseph Veneman	

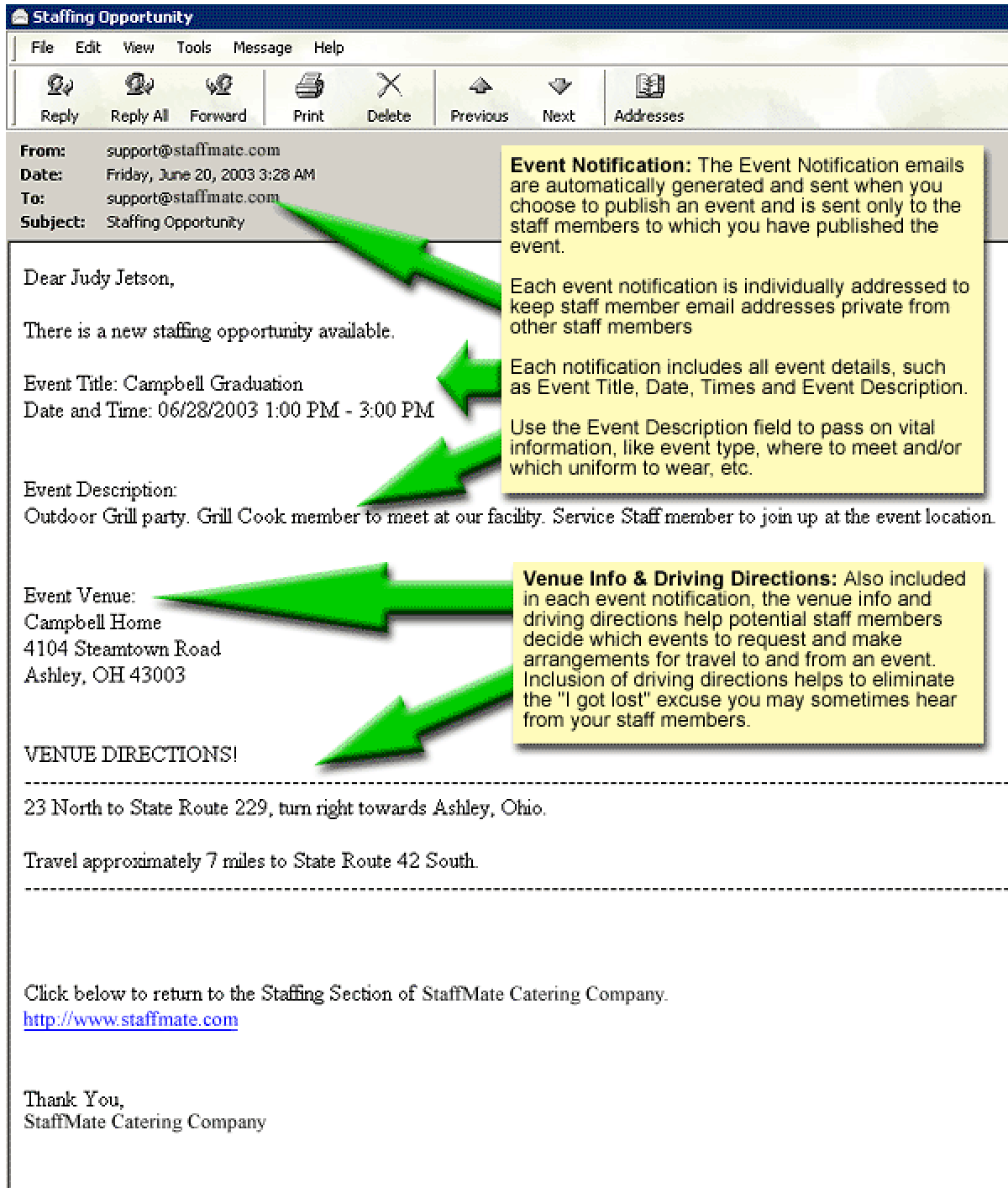
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Staff Event Notification Email

Below is a sample of the email automatically generated by StaffMate when you publish an event to your staff members.



Staffing Opportunity

File Edit View Tools Message Help

Reply Reply All Forward Print Delete Previous Next Addresses

From: support@staffmate.com
Date: Friday, June 20, 2003 3:28 AM
To: support@staffmate.com
Subject: Staffing Opportunity

Dear Judy Jetson,

There is a new staffing opportunity available.

Event Title: Campbell Graduation
Date and Time: 06/28/2003 1:00 PM - 3:00 PM

Event Description:
Outdoor Grill party. Grill Cook member to meet at our facility. Service Staff member to join up at the event location.

Event Venue:
Campbell Home
4104 Steamtown Road
Ashley, OH 43003

VENUE DIRECTIONS!

23 North to State Route 229, turn right towards Ashley, Ohio.
Travel approximately 7 miles to State Route 42 South.

Click below to return to the Staffing Section of StaffMate Catering Company.
<http://www.staffmate.com>

Thank You,
StaffMate Catering Company

Event Notification: The Event Notification emails are automatically generated and sent when you choose to publish an event and is sent only to the staff members to which you have published the event.

Each event notification is individually addressed to keep staff member email addresses private from other staff members

Each notification includes all event details, such as Event Title, Date, Times and Event Description. Use the Event Description field to pass on vital information, like event type, where to meet and/or which uniform to wear, etc.

Venue Info & Driving Directions: Also included in each event notification, the venue info and driving directions help potential staff members decide which events to request and make arrangements for travel to and from an event. Inclusion of driving directions helps to eliminate the "I got lost" excuse you may sometimes hear from your staff members.

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Staffing an Event

Once the event has been published, staff members are free to come back to their Event Calendar to review the event information and to electronically request to work the event. Staff members are limited by several factors. First, they can only request positions for which they are qualified, selected by you on their employee management screen. Second, staff members are limited by the weekly Max Hours you set for them on their employee management screen. Other than those two limitations, staff members may request to work any position by simply clicking the *Sign Up Now!* link on the Event Screen in their StaffMate section. They will automatically receive confirmation of their request via email.

Accepting or Rejecting Work Requests

On the event screen, you will see staff members who have requested to work this event. For those you have not already accepted, there will be a Green Checkmark for accepting their request and a Red X for deleting or rejecting their request. If you wish to accept a particular staff member's request, simply click the *Green Checkmark* and they will receive a confirmation email notifying them of their acceptance and the checkmark will turn gray. Do this for each staff member you wish to accept. If, for any reason, you wish to reject or delete a request by a staff member to work a particular event, simply click the *Red X*. This will remove the staff member from the shift, automatically notify them of the removal via email and open the slot again for other staff members to request.



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> Admin Home > Our Events >> Calendar View -- Line Item View -- Add Events

Saturday August 16, 2003
Search Events, Staff, or Venues:
8:33:14pm Eastern

ALL 1 2 3 4 5 REP

Event: Campbell Graduation - Update Event Info **Event Number: A10254**

Venue: Campbell Home 4104 Steamtown Road Ashley, OH 43003 Tel: 740-747-2018	Event Date 06/28/2003	Event Times 1:00 PM-3:00 PM
	Venue Contact John Campbell	Venue Email support@istaffpro.com

Driving Directions: 23 North to State Route 229, turn right towards Ashley, Ohio. Travel approximately 7 miles to State Route 42 South.

Special Instructions: Outdoor Grill party. Grill Cook member to meet at our facility. Service Staff member to join up at the event location.

Staffing Requirements

Position Type	Shift Times	Staff Member	Add/Accept/Reject/Delete
Service Staff	01:00 PM - 03:00 PM	Wilma Flintstone	✓ or X
Grill Cook	12:00 PM - 03:00 PM	Tom Thumb	✓ or X

Accept or Reject Work Requests: When a staff member requests to work an event, it is just that, a request to work. The ultimate staffing decisions lie with you. For each staff member that requests to work, you make the acceptance or rejection determination.

If you look above you will see that Wilma Flintstone has already been accepted, thus the grayed out checkmark. Tom Thumb has not yet been accepted and thus has a green checkmark.

Once you make your determination, an email is automatically dispatched to the staff member alerting them of your decision.

At any time, you can click the red "X" to reject or delete the staff member from the position in question. Upon rejection or deletion email confirmation is automatically dispatched to the staff member.

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Manually Assigning a Shift with Auto-Accept

In some instances, you may already know who you want to work a certain shift and you are aware of their availability to do so. In this circumstance, you may manually assign the staff member to the shift and Auto-Accept them.

At any time during the event staffing process, you can manually add and "accept" a staff member to a shift simply by choosing the employee from the drop-down list of available staff members for that position type and click on the Auto-Accept button. Only staff members qualified to work this particular position type will be listed in the drop down box.

When you add a staff member in this manner, they are AUTOMATICALLY ACCEPTED to work the event and sent a confirmation email alerting them to their obligation. Adding staff members this way also overrides their Max Hours limitation. Manual entry by an administrator is the only way a staff member can be assigned to work more than their Max Hours in any given work week.

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> Admin Home > Our Events >> Calendar View -- Line-Item View -- Add Events

Saturday August 16, 2003 Search Events, Staff, or Venues: EVENT# or KEYWORD Submit 8:55:43pm Eastern

ALL 3 4 5 REP

Event: Johnson Wedding - Update Event Info **Event Number: E00934**

Venue: Hyatt on Capital Square

Event Date	07/19/2003	Event Times	5:00 PM-10:00 PM
Venue Contact			

Special Instructions: Meet at AO wear formal attire

Staff Member	Add/Accept/Reject/Delete
Jack Sprat	✓ or ✗
Spongebob Squarepants	✓ or ✗
Betty Boop	? or ✓ or ✗
Judy Jetson	✓ or ✗

Drop-down menu for Betty Boop: Betty - 5 Hours, Flintstone, Wilma, Jetson, Judy - 5 Hours, Squarepants, Spongebob - 5 Hours, Thumb, Tom

Buttons: Seek Reply or Auto-Accept

Manually Staffing Shifts: When you manually fill a shift, you have two options, you can either seek a reply from the staff member or automatically accept the employee.

Seeking a Reply: You may want to select a certain staff member for a specific shift but you're not certain of his or her availability. In this case, choose the staff member from the drop down list and click the Seek Reply button.

An automatic email is generated asking them to log in to StaffMate and either accept or reject the shift.

The staff member with a dark green question mark is a staff member you requested to work this event and are still awaiting a reply from.

Auto-Accepting: You may want to select a certain staff member for a specific shift without giving them the option of accepting or rejecting the shift. Maybe you have already discussed the opportunity with them, maybe this is the way you normally schedule your staff.

In either case, choose the staff member from the drop down list and click the Auto-Accept button. The staff member will automatically be notified of their placement via email.

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Manually Assigning a Shift with Seek Reply

In yet other instances, you may already know who you want to work a certain shift but not be aware of their availability to do so. In this circumstance, you may manually assign the staff member to the shift, thus blocking any other staff member from requesting the shift, and use the **Seek Reply** option. You can look at this feature as giving a certain staff member the right to first refusal or penciling them in.

At any time during the event staffing process, you can manually “pencil in” a staff member to a shift simply by choosing the employee from the drop-down list of available staff members for that position type and click on the Seek Reply button.

When you add a staff member in this manner, they will be sent an email asking them to return to StaffMate to either accept or reject your placement. This method also overrides their Max Hours limitation. Manual entry by an administrator is the only way a staff member can be assigned to work more than their Max Hours in any given work week.

NOTE: Their temporary placement will be held for them until they either accept or reject the offer, you accept the offer for them by clicking the Green Checkmark or you delete the offer by clicking on the Red X for the shift in question to retract the offer.

You can remind the staff member of the offer and the response you have requested at any time by clicking on the Question Mark graphic. This sends the employee an email reminder to return to StaffMate, make a choice and either accept or reject their placement.

Changing a Staff Member’s Shift

You can either move a staff member from a backup position to an available shift or move a staff member from one shift to another available shift within the same event by simply choosing that staff member's name in the new shift slot to which you wish to move them and clicking either Auto-Accept to automatically accept them or Seek Reply to “pencil them in”. This will automatically remove them from the current shift and enter them into the new shift. It will also automatically send them notification via email (seeking reply for Seek Reply option or accepting them for the Auto-Accept option) and open the old slot again for other staff members to request.

Making Event Changes

You can modify any event information you want at any time you want. Some substantial updates (changes to event dates, venues and shift times) will generate email notifications to the staff members scheduled to work the event alerting them to the changes. Other less substantial modifications (like event title, event description, etc.) will not automatically generate email notifications.

Updating Basic Event Information

From the Events Calendar or the Line-Item View, click on the Event Title you wish to update. There you will see the event information for that particular event. To update the Event Info, click on the Update Event Information! Link located directly next to the Event Title. You can change the event information at will. However, remember that the event title is a required field and something must be entered into this field at all times. Also, changing the venue information for a favorite venue on this event modification page WILL NOT update the default info set for that favorite venue for other current or future events. It will change the information for this event only! To permanently update a favorite venue's information, please refer to **Updating Venues** in the **Our Venues** section of this User’s Manual. When finished updating event info, click the Modify Event button to save the new information.

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Adding Staffing Requirements

From the Event Calendar or the Line-Item View, click on the Event Title you wish to update. There you will see the event information for that particular event. Below the event and staffing information is a small form to **Add Additional Positions to This Event**. Simply enter the information requested, just as you did when entering positions originally, and click on the Add Event Position button.

Deleting Staffing Requirements

You can delete any position/shift which is not currently filled by a staff member by clicking on the delete position? link next to the shift you wish to delete. If you wish to delete a shift which is currently staffed, you can change the staff member to another shift for this event or delete them entirely from the event. Once it is no longer staffed, the position/shift can be deleted at will by clicking that shift's delete position? link.

Updating Shift Times

You can update shift times at any time, for any shift and for any event. Simply click on the Our Events tab and click on the Event Title for which you wish to change shift times. In the staffing requirements section of that event screen, find the shift you wish to update and click on the position's shift times. On the Update Shift screen, it will show you the position title and current shift times. Update the shift times as desired and then select whether to apply this update to this one shift only or to apply this update to all like shift times for this particular position type. For example, if you choose to update a Server position with shift times of 4pm - 11pm to 5pm - 10pm and choose to update all 4pm - 11pm server positions, all of the 4pm - 11pm server positions will be updated to 5pm - 10pm. **NOTE:** If you change a shift or series of shifts to which staff members are assigned, each affected staff member will automatically receive a notification of the change via email.

Deleting Events

From time to time, events may get cancelled without being rescheduled. In this circumstance, you can delete the event from the StaffMate service entirely. From the Events Calendar or the Line-Item View, click on the Event Title you wish to delete. To delete the event, click on the Update Event Information! Link located next to the event title. On the subsequent Modify Existing Event screen, click the delete? link next to the event title. The next page will ask you to confirm your intent to delete the event. Clicking NO, I Do Not Want To Delete This Event! will bring you back to the modification page without deleting the event. Clicking Yes, I'd Like To Delete This Event! will permanently delete the event from the StaffMate service and automatically notify each scheduled staff member, via email, of the event's cancellation.

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Additional Event Tools

Setting Admin Reminders



From time to time, you may find that you need to be reminded of event staffing tasks. From the event screen, click on the Clock button to set an Admin Reminder.

You select the Title, Text, Reminder Date and when the date comes around, you will be automatically sent an email reminder with the title and text you entered.

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Publishing Events: When publishing events, you can publish selectively (SEL), publish to any level of employee (1-5), publish to all of your staff members (ALL), or republish the event to previously published-to staff members (REP). You set employee levels on the employee management screen and each level can mean anything you want it to mean, seniority, performance or pay grade.

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> Admin Home > Events >> Calendar View -- Line-Item View -- Add Events

Saturday August 16, 2003 Search Events, Staff, or Venues: EVENT# or KEYWORD Submit 7:16:05pm Eastern

ALL 1 2 3 4 5 ALL REP

Event: Campbell Graduation - Update Event Info **Event Number: A10254**

Venue: Campbell Home 4104 Steamtown Road Ashley, OH 43003 Tel: 740-747-2018	Event Date 06/28/2003	Event Times 1:00 PM-3:00 PM
	Venue Contact John Campbell	Venue Email support@staffpro.com

Driving Directions: 23 North to State Route 229, turn right towards Ashley, Ohio. Travel approximately 7 miles to State Route 42 South. Special Instructions: Outdoor Grill party. Grill Cook member to meet our facility. Service Staff member to join up at the event location.

Staffing Requirements

Position Type	Shift Times	Staff Member	Add/Accept/Reject/Delete
Service Staff	01:00 PM - 03:00 PM	Wilma Flintstone	✓ or ✗
Grill Cook	12:00 PM - 03:00 PM	Tom Thumb	✓ or ✗

Add More Positions: Above you can see the positions you have already made available. You may add more positions as the need arises by filling in the type of position, shift times, number of staff needed in the form to the right.

Add Additional Positions to This Event!

Position Title:

Start Time: 1 :00 PM

End Time: 3 :00 PM

Number of Staff Needed:

Number of Backups Desired:

Add Event Position

Set Admin Reminders: You can set Admin Reminders to yourself or all admins, simply by clicking on the Clock graphic above. On the subsequent page, enter the reminder subject, text, and date you wish to be reminded. On the date you choose, an email reminder is automatically dispatched.

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Emailing Event-Specific Staff



Next to the Clock graphic is an email graphic which allows you to email event-specific staff. Click on the Email icon to email every staff member scheduled to work this event. Using the event in the graphic above as an example, an event specific email would be delivered to the two employees scheduled to work this event, Wilma Flintstone and Tom Thumb.

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> Admin Home > Our Events >> Calendar View -- Line-Item View -- Add Events

Tuesday June 24, 2003 Search Events, Staff, or Venues: 2:08:33am Eastern

ALL 2 3 4 5 SEL REP

Event: Campbell Graduation - Update Event Info **Event Number: A 0254**

Venue: Campbell Home 4104 Steamtown Road Ashley, OH 43003 Tel: 740.747.2018	Event Date: 06/28/2003 Venue Contact: John Campbell	Event Times: 1:00 PM-3:00 PM Venue Email: support@staffpro
--	--	---

Driving Directions: 23 North to State Route 229, turn right towards Ashley, Ohio. Travel approximately 7 miles to State Route 42 South.

Special Instructions: Outdoor Grill party. Grill Cook member our facility. Service Staff member to join up at the event location.

Staffing Requirements

Position Type	Shift Times	Staff Member	Add/Accept/Reject/Delete
Service Staff	01:00 PM - 03:00 PM	Wilma Flintstone	<input type="checkbox"/> or <input checked="" type="checkbox"/>
Grill Cook	12:00 PM - 03:00 PM	Tom Thumb	<input type="checkbox"/> or <input checked="" type="checkbox"/>

Event Specific Email: To broadcast an email to all staff members scheduled to work a specific event, simply click the Email graphic, which will transport you to the email entry screen, below.

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> Admin Home > Our Employees >> Add Employees -- Manage Employees

Sunday August 31, 2003 Search Events, Staff, or Venues: 1:52:31pm Eastern

Contact Employees

To Employee: AllEvent

From Administrator: support@staffmate.com

Subject Line:

Message Text:

Email Staff: From this Email Entry Screen, simply enter a Subject and Message Text and click Send This Message to send the email. On the To Line, All means all staff members, an individual's email address means it is being sent to that individual staff member, and AllEvent means it's being sent to all staff members associated with a particular event.

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Copying Events to Another Date



Right next to the email graphic is a calendar graphic. If an event happens to be a multi-day or recurring event, there is no need to enter the event again. From the original event's screen, simply click on the Calendar Graphic. On the Event Copy screen, enter the date you wish to copy the event to, the event start time and end time, if different from the original, and click on the Copy Event button to complete the copy.

This will make a complete copy of the event information, venue information and staffing needs to the "copy to" date entered. Once you have completed this process, you will now have two events on two separate days with the same information and staffing needs, the original event on the original date and the copied event on the "copy-to" date. If the staffing needs for the copied event are different from the original, simply add or delete staffing requirements to or from the copied event until the staffing requirements are just right. Find more information on Adding and Deleting Staffing Requirements on Page 36.

NOTE: You can copy any event you wish, even one which is originally a copy of another. The newly copied event will **not** be automatically published. You will need to publish the newly copied event for your staff members to receive notifications and see the event on their calendar.

Event Based Reports

The next two icons to the left of the calendar graphic on the event screen are the Fill In Report icon and the Staff Report icon, respectively.



Staff Report Icon



Fill In Report Icon

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Event Staff Report

The Event Staff Report is a printable report you can print on event day and take with you to the event. It provides all vital event details and a complete listing of all staff scheduled to work the event, complete with shift times, staff phone numbers and staff alternate numbers for ease of contact in necessary circumstances.

The Event Staff Report also includes a checkbox where you can manually record whether the staff member filled their work obligation or not.

The Staff Report graphic on the Event Screen is just one way to get to the Staff Report. You can also reach an event's Staff Report by clicking on the [Print Reports](#) tab at the top of any screen. This will show you all upcoming events for the next 30 days. Simply click [Staff Report](#) on the line associated with the event for which you want to print a Staff Report.

StaffMate - Event Staff Report			A10254: Campbell Graduation		
Venue: Campbell Home 4104 Steamtown Road Ashley, OH 43003 Tel: 740-747-2018		Event Date 06/28/2003	Event Times 1:00 PM-3:00 PM		
		Venue Contact John Campbell	Venue Email support@istaffpro.com		
Driving Directions: 23 North to State Route 229, turn right towards Ashley, Ohio. Travel approximately 7 miles to State Route 42 South.		Special Instructions: Outdoor Grill party. Grill Cook member to meet at our facility. Service Staff member to join up at the event location.			
Position	Scheduled Time	Staff Member	Staff Phone	Staff Cell	Attend?
Service Staff	01:00 PM-03:00 PM	Unfilled	NA	NA	<input type="checkbox"/>
Grill Cook	12:00 PM-03:00 PM	Tom Thumb	740-747-2018	NA	<input type="checkbox"/>

Printable Staff Report Staff Info: The Printable Staff Report provides essential staff information for each staff member scheduled to work a certain event. Each staff member, complete with contact info, is listed by position type and shift times.

Print this report on event day and take the report with you. If the need arises, you will have staff contact information right at your fingertips.

If you had made backups available for this event, they too would be listed with contact info.

Use the printed report to track attendance by checkmarking the Attend? box.

Event Information: The staff report also provides vital event information so that, if the need arises, you have all event and venue information right on this single report.

Also included in the staff report are driving directions and any special instructions you entered when adding this event.

Every bit of information you could possibly need on event day is contained within this report.

Forget the Staff Report?
 No problem! With StaffMate, all reports (as well as the entire StaffMate service) are available to you 24/7, from anywhere in the world, via the Internet!

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Event Fill-In Report

The Event Fill In Report is a printable report you can print on event day and take with you to the event. It provides all vital event details and a complete listing of all staff members **NOT** scheduled to work the event, complete with staff phone numbers and staff alternate numbers for ease of contact in necessary circumstances.

In the event that more staff members become necessary or some scheduled staff members do not show, this report will give you the names, phone numbers and alternate numbers, by position type, of staff members not scheduled to work the event. This way, you can easily call on staff members to make the necessary replacements and/or additions.

StaffMate - Fill In Report		A10254: Campbell Graduation	
Venue: Campbell Home 4104 Steamtown Road Ashley, OH 43003		Event Date 06/28/2003	Event Times 1:00 PM-3:00 PM
Tel: 740-747-2018		Venue Contact John Campbell	Venue Email support@istaffpro.com
Driving Directions: 23 North to State Route 229, turn right towards Ashley, Ohio. Travel approximately 7 miles to State Route 42 South.		Special Instructions: Outdoor Grill party. Grill Cook member to meet at our facility. Service Staff member to join up at the event location.	
Position	Staff Member	Staff Phone	Staff Cell
Bartender	Jack Sprat	740-747-2018	N/A
Bartender	Wilma Flintstone	740-747-2018	N/A
Coordinator	Judy Jetson	740-747-2018	N/A
Lead	Betty Boop (NA from 10:00 AM - 12:00 PM)	740-747-2018	N/A
Lead	Spongebob Squarepants (NA from 10:00 AM - 12:00 PM)	740-726-2008	N/A
Service Staff	Betty Boop (NA from 10:00 AM - 12:00 PM)	740-747-2018	N/A
Service Staff	Judy Jetson	740-747-2018	N/A
Service Staff	Wilma Flintstone	740-747-2018	N/A
Service Staff	Spongebob Squarepants (NA from 10:00 AM - 12:00 PM)	740-726-2008	N/A
Grill Cook	Spongebob Squarepants (NA from 10:00 AM - 12:00 PM)		

Printable Fill In Report: Included in the Fill In Report are the names and phone numbers of each of the staff members NOT scheduled to work this event. The staff members are listed by position type, making last minute replacements a snap!

If a staff member is scheduled to work another event on this particular date, the hours they are not available (NA) are clearly marked.

StaffMate can't guarantee that each staff member scheduled to work an event will show, but with the printable staff report and the printable fill in report, StaffMate can help solve most potentially significant event day challenges.

Event Information: The fill in report also provides vital event information so that, if the need arises, you have all event and venue information right on this single report.

Also included in the fill in report are driving directions and any special instructions you entered when adding this event.

Every bit of information you could possibly need on event day is contained within this report.

Forget the Fill In Report?
No problem! With StaffMate, all reports (as well as the entire StaffMate service) are available to you 24/7, from anywhere in the world, via the Internet!

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5: Additional StaffMate Tools

Automatic Event/Staff Reminders

Admin Finalization Reminder

Approximately 4-5 days prior to an event, the Admins will automatically receive an email reminder of the upcoming event and encourage them to finalize staffing for the event.

Staff Work Commitment Reminders

Approximately 2-3 days prior to an event, each staff member assigned to work the event will automatically receive an email reminder of their upcoming obligation to work. All event information is included in this email.

The screenshot shows an email interface with the following content:

From: support@staffmate.com
Date: Tuesday, June 24, 2003 8:21 AM
To: webmaster@staffmate.com
Subject: Event Obligation Reminder!

Dear Wilma Flintstone,

This is a reminder of your obligation to work the following event, which is scheduled within the next few days:

Position: Service Staff
Event Title: Campbell Graduation
Date and Shift Time: 06/28/2003 from 01:00 PM - 03:00 PM

Event Description:
Outdoor Grill party. Grill Cook member to meet at our facility. Service Staff member to join up at the event location.

Event Venue:
Campbell Home
4104 Steamtown Road
Ashley, OH 43003

VENUE DIRECTIONS!

23 North to State Route 229, turn right towards Ashley, Ohio.

Travel approximately 7 miles to State Route 42 South.

PLEASE REMEMBER: This email means you are expected to work this event. If you can no longer fulfill your obligation, YOU MUST call the staffing coordinator at 740-747-2018 as soon as possible to find a suitable replacement.

Click below to return to the Staffing Section of StaffMate Catering Company
<http://demo.staffmate.com>

Thank You,
StaffMate Catering Company

Event Reminders: Two to Three days prior to event day, each employee scheduled for the event automatically receives an email reminder of their obligation to work the event! Each reminder is individually addressed and contains all vital event details, such as special instructions and driving directions.

Obligations and Replacements: Each event reminder comes with wording reminding the staff member of their obligation and alerting them that they must call the staffing coordinator to find a suitable replacement if they can no longer fulfill their obligation. Your phone number is automatically included in each reminder email for their convenience. An email reminder with all event details substantially reduces call-offs, no-shows, and tardiness!

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Additional StaffMate Tools

Search Events, Venues & Employees

Search Events, Venues and Employees easily from the top of every page. Search Events by Event Number, Event Title or Event Description. Search Staff Members by First Name, Last Name, User Name, Employee ID Number or Email Address. Search Venues based on Venue Name or Contact Person.

Summary Work Report

Available by clicking the [Print Reports](#) tab is the Summary Work Report. This report asks you for a start date and an end date for the report. Enter these two dates and the StaffMate service will pull up each employee, the events and dates they were scheduled to work during that time period, the resulting scheduled work time and total scheduled hours. This is a great way to keep track of scheduled hours so that you can compare the actual hours submitted by the staff member.

Several caveats, staff and event schedules are only saved for 60 days beyond the event date to keep your databases from utilizing unnecessary space. Therefore, reports are only available for 60 days from the event dates. Also, this report DOES NOT track actual hours worked, as the StaffMate service is not an employee benefits/payroll service. It simply tracks the hours each employee was or is scheduled to work.

One additional benefit, this report can show both past and future dates, so you can print a Summary Work Report for the upcoming work week for staff scheduling purposes, if you like.

Published To Report

This report is designed so that you may determine if you are publishing events fairly. Choose a report start date and a report end date and the report will generate a list of all employees who have had events published to them with each event that was published to them listed under their name.

Seniority Report

The seniority report lists each staff member by start date from the most senior employee to the least senior staff member. This report relies upon the information you provide in the Start Date field of each employee's management screen.

Yahoo! by Phone Overview

For a very nominal monthly fee, Yahoo! by Phone allows staff members to call toll-free from any phone in the U.S. and have their StaffMate notification emails read to them over the phone. If some of your staff members don't have computers, access to the Internet or email accounts, they can simply set up a Yahoo! by Phone account. Yahoo! will provide them with their very own email address and a toll-free number, so anyone, anywhere can send them email that they can then have read to them by phone.

How to Use Yahoo! by Phone with StaffMate

Because Yahoo! by Phone works just as regular email does up to the point to where it is read over the phone to your employee, there are no additional steps necessary when publishing to or emailing staff members utilizing Yahoo! by Phone email. It is, however advisable to refrain from using abbreviations in your event description and driving directions, as the Yahoo! email translation can sometimes have difficulty interpreting your intent. For example, 123 Main St. would be read as 123 Main Saint, potentially creating some confusion.

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Yahoo! by Phone Account Setup

Just go to Yahoo! by Phone (<http://phone.yahoo.com>), register for a Yahoo! ID and password and choose your own Yahoo! mailbox number and PIN. We recommend choosing a mailbox number that's easy to remember, such as your telephone number. After you agree to the Yahoo! by Phone Terms of Service, Yahoo! will ask you to provide billing information for monthly billing. Below are additional process details.

1. Acquire a Yahoo! ID

The first step for enrolling in Yahoo! by phone is creating a Yahoo! ID. The Yahoo! ID will become your email address. For example, if you choose **greatserver** as your Yahoo! ID, your email address would be **greatserver@yahoo.com**. You will also use the Yahoo! ID and password you create in this step each time you wish to access your email via the web or update your billing and/or contact information.

The Yahoo! ID must be a unique user name and the password can be anything you want but make it something easy for you to remember. By providing some basic contact information, you will have completed this step of the process.

2. Enroll in Yahoo! by Phone

The second step of the process involves creating a mailbox number and PIN for phone access. You will use this mailbox number and PIN each time you access your email by phone so it is important to make the mailbox number and PIN something easy for you to remember. Enter the requested information to proceed to the next step.

3. Agree to the Yahoo! by Phone Terms of Service

In this step, you will be presented with the Yahoo! by phone Terms of Service. Review the terms and signify your acceptance by making the appropriate selection and submitting the acceptance.

4. Provide Billing Information

The final step of the process is for you to provide billing information. Yahoo! by Phone accepts Visa, MasterCard, Discover, and American Express credit cards, and debit cards with the Visa or MasterCard logo on them. Please make sure that the billing address you're entering is the same as the address on your credit card bill. You may also want to double-check the expiration date and make sure that you aren't entering hyphens in the space for your credit card number. Once you submit payment information, you are finished.

Full detailed instructions on how to utilize Yahoo! by Phone are available to your staff members within the User Manual section of the StaffMate Service. The document is entitled **Detailed Yahoo! by Phone Instructions**. We have also made the instructions available to you within the Admin User Manual section as an addendum entitled **Detailed Yahoo! by Phone Instructions**. As usual, to get to the User Manuals and StaffMate documentation, simply click on the [User Manual](#) link in the upper right hand corner of any StaffMate screen. Staff Members will be sent to the Staff Member User Manuals and you and other Admins will be sent to the Admin User Manuals automatically.

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6: StaffMate Tutorial

Self-Demonstration Tutorial

During the self-demonstration period, we suggest you try the following tasks to fully experience StaffMate for yourself. As you enter, publish and staff demo events, we will play along with you by acting as employees. We will return to StaffMate to request shifts, we will accept and/or decline shifts for which you have sought replies, and we will have a few of the demo staff members reply to your broadcast emails. We want you to get the most out of this demonstration and to discover all of the powerful features StaffMate can bring to your event staff scheduling process.

Add or Modify Position Titles – Instructions on [Page 15](#)

Add/Modify a Few Employees – Instructions on [Page 19](#)

Add/Modify a Favorite Venue – Instructions on [Page 23](#)

Add Several Events – Instructions on [Page 26](#)

Manually Fill a Few Shifts with Auto-Accept – Instructions on [Page 34](#)

Manually Fill a Few Shifts with Seek Reply – Instructions on [Page 35](#)

Publish the Events – Instructions on [Page 30](#)

Update Shift Times – Instructions on [Page 36](#)

Make a Few Event Detail Changes – Instructions on [Page 35](#)

Accept Staff Member Work Requests – Instructions on [Page 33](#)

Search for Events, Venues and/or Employees – Instructions on [Page 43](#)

Copy an Event to Another Date – Instructions on [Page 39](#)

Set Admin Reminders – Instructions on [Page 37](#)

Print the StaffMate Staff Report – Instructions on [Page 40](#)

Print the StaffMate Fill In Report – Instructions on [Page 41](#)

Online User Manual

Save This User Manual to Your Desktop – By Choosing *File -> Save As*, Browsing to the [Desktop](#) and Clicking on the [Save](#) Button

Print this Manual – By Choosing *File -> Print*

Contacting StaffMate

If, at any time during your demonstration period, you have questions, comments or concerns, feel free to contact StaffMate at your convenience. We are here to help you along the way. Call us at 1-888-STAFF-411 (1-888-782-3341) or email us at support@staffmate.com. We are confident that once you realize how robust StaffMate is and discover all the ways it can help your company save time, energy and resources, you will want to add that power and efficiency to your staff scheduling process.

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