

StaffMate Online: Quick Start Guide

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

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

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

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

If at any time during the process you have questions, comments and/or concerns feel free to contact StaffMate via email at support@staffmate.com or call our support line at 1-888-782-3341.

The Quick Start Setup Process

Preview: [Familiarize Yourself with the Event Calendar](#)

Step 1: [Enter Your Position Titles](#)

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Step 3: [Enter Your Favorite Venues](#)

Step 4: [Add Your First Event](#)

Step 5: [Publish and/or Manually Staff Your Event](#)

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

Web Address http://_____staffmate.com

User Name _____

Password _____

Preview: Familiarize Yourself with the Event Calendar

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

You can, however, reach the Event Calendar at any time during your session by clicking on the [Our Events](#) tab at the top of the screen. 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.

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

The screenshot shows the StaffMate Online interface. At the top left is the StaffMate logo. To the right are links for 'contact', 'staffmate', 'user manuals', and 'log out'. Below these is a search bar with a 'go' button. A navigation bar contains tabs for 'Account Options', 'Positions', 'Our Staff', 'Our Venues', 'Our Events', 'Staff Memo', and 'Reports'. Below the tabs are links for 'Our Events Links: Calendar View | Line Item View | Add Events'. The main calendar area shows 'January 2005 - February 2005' with a 'Filter Events: All Events' dropdown. The calendar grid displays days from Sunday to Saturday. A mouse cursor is over January 19. An event titled 'Johnson Wedding - Corporate Event' is listed for January 21.

Event Calendar Navigation

To display months other than the current 30 day period, you can use the green arrows located on either side of the Month & Year display at the top of the calendar. These arrows will transport you to either the previous 30 day period or the next 30 day period, depending on which green arrow you click. You may also click the calendar icon located to the right of the Forward Green Arrow. This will allow you to instantly jump to any date from the previous month through the next 11 months.

Step 1: Enter Your Position Titles

In order to set up StaffMate Online for first time use, you must first enter the position titles you use in your business to classify your service staff. To get to the positions titles page, simply click on the [Positions](#) tab located toward the top of the StaffMate Online screen.

The screenshot shows the StaffMate Online web interface. At the top left is the StaffMate Online logo. To the right are links for 'contact', 'staffmate', 'user', 'manuals', and 'log out'. Below these is a search bar with the text 'search:' and a 'go' button. A navigation bar contains several tabs: 'Account Options', 'Positions' (highlighted in green), 'Our Staff', 'Our Venues', 'Our Events', 'Staff Memo', and 'Reports'. The main content area is divided into two sections. The left section, 'Add New Position Title', has a text input field containing 'Banquet Server' and an 'Add Position' button. The right section, 'Manage Your Position Titles', displays a list of position titles, each with a checkbox, a text input field, a 'Modify Position' button, and a 'delete position?' link. The list includes: Activities Director, Bartender, Coat Check, Coordinator, Grill Cook, Kitchen Assistant, Lead, and Wait Staff. At the bottom of the page is a green footer with the text: '© 2002-2005 StaffMate Online. All rights reserved. Use of StaffMate Online is subject to License Agreement Terms.'

To Add or Modify Starting Position Titles

Once on the Positions page, seek out the "Add New Position Title" section, located on the left-hand side of the page. Simply type a Position Title and click the [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, seek out the "Modify Your Position Titles" 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.

BEGIN QUICK START GUIDE ACTION ----->

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

Once you have added your position titles, proceed to **Step 2: Add Your Employees.**

END QUICK START GUIDE ACTION ----->

Step 2: Add Your Employees

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

The screenshot shows the StaffMate Online interface. At the top left is the StaffMate logo. To the right are links for 'contact', 'staffmate', 'user', 'manuals', and 'log out'. Below these is a search bar with a 'go' button. A navigation bar contains tabs for 'Account Options', 'Positions', 'Our Staff' (highlighted in green), 'Our Venues', 'Our Events', 'Staff Memo', and 'Reports'. Below the tabs is a green bar with links: 'Our Staff Links: Add Staff Members | Modify Staff Members | Manage Employee Levels | Global Staff Member Updates'. The main heading is 'Manage Your Employees (16 Total)' with a 'Filter Staff:' dropdown set to '- All Staff Members' and a 'Filter' button. Below this is a list of 16 employees, each with a checkbox, name, and a 'del?' link. The employees listed are: Brown, Charlie; Flintstone, Wilma; Hill, Holly; Jetson, Jane; Jetson, Judy; Mouse, Mickey; Rubble, Barney; Rubble, Betty; Ruby, Max; Shortcake, Strawberry; Sprat, Jack; Squarepants, Spongebob; Star, Patrick; Tentacles, Squidward; Turner, Timmy; and Van Pelt, Lucy. At the bottom of the list is a 'COMMUNICATE:' section with a dropdown menu set to 'Broadcast an Email to...' and a 'Create Email' button. A green footer bar contains the copyright notice: '© 2002-2005 StaffMate Online. All rights reserved. Use of StaffMate Online is subject to License Agreement Terms.'

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

BEGIN QUICK START GUIDE ACTION ----->

From the Staff Management Page, locate the green bar below the tabs. Included in this green bar are links that apply to the staff management section of StaffMate Online. Included among these links is the link to [Add Staff Members](#). Click this link to get to the Add Staff Member Page.

END QUICK START GUIDE ACTION ----->

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

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

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

Add a New Staff Member

* All Maroon Fields are Required

First Name:	<input type="text" value="Fred"/>	Last Name:	<input type="text" value="Flintstone"/>
Email Address:	<input type="text" value="demo@staffmate.com"/>		
Max Hours:	<input type="text" value="39"/>	TIP: 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.	
Employee Level:	<input type="text" value="Level 1"/>	TIP: Employees can be separated by up to 5 "Levels" based upon any criteria you wish to use. Levels can be associated with performance, pay grades, seniority, etc. 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 Hatus" level for employees on vacation, returning to school or on suspension.	
Admin Access:	<input type="radio"/> Full Admin Access <input type="radio"/> Staff & Fill In Report Access <input checked="" type="radio"/> No Admin Access		TIP: If you choose to give Full Admin Access to any employee, they will have the same access and privileges as you do. 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.

Positions for which this employee is qualified: Checkmark the positions for which this employee is eligible. 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 that employee the ability to sign up for Bartender positions for any given event. If you wish to track event staff costs with StaffMate Online's budget feature, include the hourly pay rate for each position checkmarked.

<input type="checkbox"/> Activities Director	Pay Rate \$ <input type="text"/>	per hour.	<input checked="" type="checkbox"/> Bartender	Pay Rate \$ <input type="text" value="18.00"/>	per hour.
<input checked="" type="checkbox"/> Coat Check	Pay Rate \$ <input type="text" value="12.00"/>	per hour.	<input type="checkbox"/> Coordinator	Pay Rate \$ <input type="text"/>	per hour.
<input type="checkbox"/> Grill Cook	Pay Rate \$ <input type="text"/>	per hour.	<input type="checkbox"/> Kitchen Assistant	Pay Rate \$ <input type="text"/>	per hour.
<input checked="" type="checkbox"/> Lead	Pay Rate \$ <input type="text" value="20.00"/>	per hour.	<input checked="" type="checkbox"/> Wait Staff	Pay Rate \$ <input type="text" value="16.00"/>	per hour.

If you wish to add this new employee and continue to add other information relative to this employee, click the "Employee Full Add" button below. This option will allow you to continue to add the employee's address, phone numbers, ID number, start date, birth date and review interval.

If you wish to add this new employee and quickly move on to adding additional employees, click the "Employee Quick Add" button below. The information above is adequate to get the staff member started using StaffMate Online and if you have a lot of employees to add, use the Quick Add feature to quickly save just this basic information and move on to add another employee. You can always add the other employee information at a later time.

BEGIN QUICK START GUIDE ACTION ----->

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

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

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

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

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

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

Furthermore, use the "On Hiatus" level for employees on vacation, employees returning to school or employees on suspension. Staff Members on hiatus will not receive any email correspondence from 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: The choice you make here determines what privileges this employee will enjoy. If you choose to give Full Admin Access to this employee, they will have the same access and privileges as you do.

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

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

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

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

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

When you're done entering the information, click the [Employee Full Add](#) button to add this initial information, send the welcome email and continue to the step 2 of the employee addition process: Modify Employee Contact Information.

END QUICK START GUIDE ACTION ----->

Modify Fred Flintstone's Contact Information

* All Maroon Fields are Required

First Name:	<input type="text" value="Fred"/>	Last Name:	<input type="text" value="Flintstone"/>
Email Address:	<input type="text" value="demo@staffmate.com"/>		
Address:	<input type="text" value="1234 Main Street"/>	(Address Line 1)	
	<input type="text"/>	(Address Line 2)	
	<input type="text" value="Anytown"/>	<input type="text" value="OH"/>	<input type="text" value="43210"/> (City, State Zip)
Phone Numbers:	Home: <input type="text" value="614-555-1212"/>	Cell: <input type="text" value="614-555-1313"/>	
	Work: <input type="text" value="614-555-1414"/>	Pager: <input type="text"/>	
		Fax: <input type="text"/>	
User Name:	<input type="text" value="FF6534158"/>	<small>TIPS: 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.</small>	
Password:	<input type="password"/>		
			<input type="button" value="Modify Contact Info"/> <input type="button" value="Cancel"/>

BEGIN QUICK START GUIDE ACTION ----->

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

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

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

END QUICK START GUIDE ACTION ----->

Modify Fred Flintstone's Account Settings

* All Maroon Fields are Required

Employee ID Number:	<input type="text" value="E2034"/>	Birth Date:	<input type="text" value="May"/> <input type="text" value="10"/> <input type="text" value="1960"/>
Start Date:	<input type="text" value="Feb"/> <input type="text" value="14"/> <input type="text" value="2001"/>	Review Interval:	<input type="text" value="Every 365 Days"/>
Max Hours:	<input type="text" value="39"/>	TIPS: 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.	
Employee Level:	<input type="text" value="Level 1"/>	TIPS: Employees can be separated by up to 5 "Levels" based upon any criteria you wish to use. Levels can be associated with performance, pay grades, seniority, etc. 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.	
Admin Access:	<input type="radio"/> Full Admin Access <input type="radio"/> Staff & Fill In Report Access <input checked="" type="radio"/> No Admin Access	TIPS: If you choose to give Full Admin Access to any employee, they will have the same access and privileges as you do. 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.	
		<input type="button" value="Modify Account Settings"/> <input type="button" value="Cancel"/>	

BEGIN QUICK START GUIDE ACTION ----->

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

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

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

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

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

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

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

END QUICK START GUIDE ACTION ----->

Step 3: Enter Your Favorite Venues

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

Add a New Favorite Venue

* Venue Name:	Water Buffalo Lodge
Address:	1355 Limestone Avenue
Address 2:	
City:	Bedrock
State:	Ohio
Zip Code:	43210
Venue Contact Person:	Grand Poobah
Venue Phone:	614-555-1212
Venue Email:	demo@staffmate.com

If this venue has directions on their web site, provide a link directly to their directions page here. Or you can provide a link to a map to the venue from a mapping web site, like [Yahoo! Maps](#).

Web Site Map or Directions:	
Directions:	<pre>From StaffMate Catering: Turn Right on Fossil Drive. Proceed to Quartz Lane and veer left. Take a left on Limestone Avenue. The Water Buffalo Lodge is on the right.</pre>

Venue Name is required, the Address, Address Line 2, City, State and Zip fields are not. However, providing this information will allow your staff members to see the address of the venue so they know how to get there on event day. The Venue Contact, Phone and Email Address are not required either and are not visible to your staff members, but are useful if you need to make contact with the venue to finalize staffing plans.

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

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

BEGIN QUICK START GUIDE ACTION ----->

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

END QUICK START GUIDE ACTION ----->

Step 4: Add Your First Event

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

To add your first event, return to the event calendar by clicking on the [Our Events](#) tab toward the top of the StaffMate Online screen. On the calendar, locate the date to which you wish to add this event and simply click on the date. For example, if you wish to add an event to the 22nd, simply click on the number 22 representing that date. This will bring you to the first step of the event addition process.

The screenshot shows the StaffMate Online interface. At the top left is the StaffMate logo. To the right are links for 'contact', 'staffmate', 'user', 'manuals', and 'log out'. Below these is a search bar with a 'go' button. A navigation bar contains tabs for 'Account Options', 'Positions', 'Our Staff', 'Our Venues', 'Our Events', 'Staff Memo', and 'Reports'. Below the tabs is a green bar with 'Our Events Links: Calendar View | Line Item View | Add Events'. The main area features a calendar for 'January 2005 - February 2005'. The calendar is currently displaying January 2005. The days of the week are listed at the top: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday. The dates are arranged in a grid. On January 20, there is an event titled 'Johnson Wedding' with a sub-label 'Corporate Event'. On January 25, there is a small icon representing a group of people. The calendar also includes a 'Filter Events' dropdown menu set to 'All Events' and a 'Filter' button.

Is Your Event 30+ Days Off?

To add an event outside of the 30 day period exhibited on the event calendar, simply use the navigation features we discussed at the beginning of the Quick Start Guide to proceed to the date to which you wish to add the event.

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

Add a New Event Step One: Enter Event Details

* All Maroon Fields are Required

Event Number:	<input type="text" value="E00259"/>	TIP: Enter the event number generated by your catering management software to help make it easier to locate events.
Event Title:	<input type="text" value="ABC Corporate Dinner"/>	TIP: Enter any event title that you wish here. The event title can be as descriptive or as vague as you wish it to be. For example, you may want to be a little more vague in instances where you find staff members are signing up for more popular events and avoiding less popular ones.
Event Date:	<input type="text" value="01/22/2005"/>	
Event Set Up Time:	<input type="text" value=": : :"/>	TIP: The Event Set Up Time is an optional field designed to let your staff know how much time they have for set up prior to the start of the event.
Event Start Time:	<input type="text" value="4 :30 PM"/>	The Event Start Time & Event End Time fields are the approximate start time and end time of the event, not necessarily the shifts within that event. Noon = 12:00pm Midnight = 12:00am
Event End Time:	<input type="text" value="10 :00 PM"/>	
Event Description:	<input type="text" value="Sit down dinner for 100 guests. Wear your formals with bow ties.

Set up crew to meet at StaffMate, all others meet at the venue."/>	TIP: The Event Description field is not only for you to provide details of the event, but also to provide special instructions to your employees about the event. For example, "Please wear your own white dress shirt to this event" or "Meet at the venue". Again, you can make the description as detailed or as vague as you wish.
Event Staff Budget: (e.g. 10545.00)	<input type="text" value="\$ 700.00"/>	TIP: Enter either an ideal or maximum staff budget for this event. If you have entered pay rates for your employees, StaffMate Online will automatically calculate the actual staff costs as the event becomes staffed. This will help you make staffing decisions that make financial sense to this particular event.
Choose Event Venue:	<input type="text" value="Water Buffalo Lodge, Bedrock"/>	TIP: If you currently have venues saved in your Favorite Venues and wish to use one of them for this event, simply choose that venue from the drop down list to the left. If you wish to use a venue you have not saved as a Favorite Venue, you will be given the opportunity to enter venue details on the next page.

Press the "Add New Event" button to the right to save this event information and continue to **Step Two: Add or Verify Venue Information.**

BEGIN QUICK START GUIDE ACTION ----->

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

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

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

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

Event Set Up Time: This field **IS NOT** required but useful if you would like to let the set up crew know how much time they have to set up before the event begins.

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

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

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

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

Once you have finished entering the information on this page, click the [Add Event](#) button to proceed to the next step of the process: Add or Verify Venue Information.

END QUICK START GUIDE ACTION ----->

BEGIN QUICK START GUIDE ACTION ----->

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

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

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

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

Once you have finished entering or verifying the venue information on this page, click the [Enter Venue Information](#) or [Modify Venue Information](#) button to proceed to the final step of the event addition process: Enter Staffing Requirements.

END QUICK START GUIDE ACTION ----->

Add a New Event Step Three: Enter Staffing Requirements for E00259: ABC Corporate Dinner

* All Maroon Fields are Required

Position Type:	<input type="text" value="Wait Staff"/>	TIP: Choose a position type that you need for this event from the drop-down list provided. The position titles displayed here are the positions you have previously entered in the Positions section of the StaffMate service.
Shift Start Time:	<input type="text" value="4"/> : <input type="text" value="30"/> <input type="text" value="PM"/>	TIP: 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.
Shift End Time:	<input type="text" value="6"/> : <input type="text" value="30"/> <input type="text" value="PM"/>	TIP: StaffMate Online now allows you to "disguise" shift end times to help you alleviate issues arising from making them public. For example, if an event runs short, you may have employees say "you promised me so many hours". If an event runs long, you may have employees say "you promised me I could leave at a particular time". Use the options to the left to disguise shift end times for your staff members.
End Time Display:	<input type="radio"/> The Shift End Time as Entered Above <input checked="" type="radio"/> Display "Approx." Shift End Time <input type="radio"/> Display "TBD" <input type="radio"/> Display "???"	TIP: 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 Staff Needed:	<input type="text" value="10"/>	TIP: 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.
Number of Backups Desired:	<input type="text"/>	

Press the "Add These Shifts" button to the right to save the shifts entered above and continue to **Add More Shifts**.

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

BEGIN QUICK START GUIDE ACTION ----->

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

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

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

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

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

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

Add a New Event Step Three: Enter Staffing Requirements for E00259: ABC Corporate Dinner

* All Maroon Fields are Required

Position Type:	<input type="text" value="Wait Staff"/>	TIP: Choose a position type that you need for this event from the drop-down list provided. The position titles displayed here are the positions you have previously entered in the Positions section of the StaffMate service.
Shift Start Time:	<input type="text" value="6"/> : <input type="text" value="30"/> <input type="text" value="PM"/>	TIP: 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. Noon = 12:00pm Midnight = 12:00am
Shift End Time:	<input type="text" value="10"/> : <input type="text" value="00"/> <input type="text" value="PM"/>	
End Time Display:	<input type="radio"/> The Shift End Time as Entered Above <input checked="" type="radio"/> Display "Approx." Shift End Time <input type="radio"/> Display "TBD" <input type="radio"/> Display "???"	TIP: StaffMate Online now allows you to "disguise" shift end times to help you alleviate issues arising from making them public. For example, if an event runs short, you may have employees say "you promised me so many hours". If an event runs long, you may have employees say "you promised me I could leave at a particular time". Use the options to the left to disguise shift end times for your staff members.
Number of Staff Needed:	<input type="text" value="5"/>	TIP: 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:	<input type="text"/>	TIP: 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.

Press the "Add These Shifts" button to the right to save the shifts entered above and continue to **Add More Shifts**. If you are finished entering shifts, press the "Finalize Staff Requirements" button below to finalize the Event Addition process.

Add These Shifts

Staffing Requirements Entered So Far

Shift Position Type	Shift Start & End Times	Display Shift End Time As:
10 Wait Staff	4:30 PM to 6:30 PM	Approx. 6:30 PM

Press the "Finalize Staff Requirements" button to the right to complete the process of adding staff requirements and finalize the Event Addition process.

Finalize Staff Requirements

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

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

END QUICK START GUIDE ACTION ----->

E00259: ABC Corporate Dinner

Saturday January 22, 2005

[: : Update Event Information : .](#)

From: 4:30 PM - 10:00 PM

[Published-To List](#) | [Event Notification Call List](#)



Venue: **Water Buffalo Lodge**
1355 Limestone Avenue
Bedrock, OH 43210

Contact: Grand Poobah
Tel: 614-293-3256
Email: demo@staffmate.com

[: : Update Venue Information : .](#)

Venue Directions: From StaffMate Catering:
Turn Right on Fossil Drive. Proceed to Quartz Lane and veer left.
Take a left on Limestone Avenue. The Water Buffalo Lodge is on
the right.

Event Details & Staff Member Instructions: Sit down dinner for 100 guests. Wear your formals with bow ties.

Set up crew to meet at StaffMate, all others meet at the venue.

Staffing Requirements

This event is currently \$700.00 **UNDER** budget

[: : Add More Shifts to This Event : .](#)

[Publishing Options >>](#) ALL 1 2 3 4 5 SEL REP

>> 10 Wait Staff Employees (Still Need: 10)

4:30 PM - 6:30 PM (Approx. 6:30 PM)

[Manually Staff Some Wait Staff Shifts](#) | [Remove Some Vacant Wait Staff Shifts](#)

There are no employees yet scheduled for this shift!

>> 5 Wait Staff Employees (Still Need: 5)

6:30 PM - 10:00 PM (Approx. 10:00 PM)

[Manually Staff Some Wait Staff Shifts](#) | [Remove Some Vacant Wait Staff Shifts](#)

There are no employees yet scheduled for this shift!

Event Management Page

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

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

All newly added events start off private, "hidden" from staff members until you decide to manually schedule and/or publish the event to the staff members you feel are best suited to work this event. And even then, only those you schedule or to whom you publish the event will be alerted to the work opportunity via email and be able see the event on their calendar.

This brings us to the final step of the Quick Start Guide: Publish and/or Manually Staff Your Event.

Step 5: Publish and/or Manually Staff Your Event

The best way to describe Publishing and Manually Staffing an event is to relate it to the way you are most probably scheduling your staff now, except for having to make all the telephone calls. So let's take it from the beginning.

You receive the event information from one of your bookers and instantly may know a staff member that you would like to work a key position within the event, maybe the lead or captain. You also know that this person is available anytime and would like to work the event, so you write their name on the schedule sheet.

You also know a few other staff members that have been with you forever and are among your most reliable staff. You know which positions you would like these employees to work but are unsure of their availability. So you try calling these staff members, and even if you're unsuccessful at getting a hold of them, you "pencil" them in until you receive a response from them.

Then you have a group of employees that you call generally to fill in the rest of the positions. And then, finally, every staffing coordinator has a group of employees that they only call when they absolutely need to.

Now, apply that same methodology to StaffMate Online and you will easily be able to see how Publishing and Manually Staffing allows you to schedule your staff members exactly the same way to which you are accustomed.

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

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

Selective Publishing: Use this notification method to selectively announce new work opportunities to just the employees you wish to fill the remaining positions within an event. Although there are several publishing methods, Selective Publishing is, by far, the most unique and most popular. When you selectively publish an event, those staff members to whom you publish the event will automatically receive an email notification of the opportunity and will be able to see the event on their own personal StaffMate Online calendar. Once notified, the staff members can log in to review the event details and, if so inclined, request to work one of the remaining positions for which they are qualified.

Now that you have a clear understanding of the concept behind StaffMate Online's Publishing and Scheduling features, we will demonstrate how to employ each method.

How To Publish and Manually Staff an Event

In order to demonstrate how to employ the Publishing and Scheduling methods, we will focus our attention on the Staffing Requirements section of the Event Management Page. If you are no longer on the Event Management Page, simply click on the Our Events tab to return to your calendar. Now, click on the title of the event with which you have been working and that will transport you to the Event Management Page for this event.

Staffing Requirements

This event is currently \$700.00 UNDER budget

: Add More Shifts to This Event :

Publishing Options >> ALL 1 2 3 4 5 SEL REP

>> 10 Wait Staff Employees (Still Need: 10)

4:30 PM - 6:30 PM (Approx. 6:30 PM)

[Manually Staff Some Wait Staff Shifts](#) | [Remove Some Vacant Wait Staff Shifts](#)

There are no employees yet scheduled for this shift!

>> 5 Wait Staff Employees (Still Need: 5)

6:30 PM - 10:00 PM (Approx. 10:00 PM)

[Manually Staff Some Wait Staff Shifts](#) | [Remove Some Vacant Wait Staff Shifts](#)

There are no employees yet scheduled for this shift!

Manual Staffing with Auto-Accept & Seek Reply




To manually staff employees, first locate the position title and shift time in the Staffing Requirements section that you are interested in scheduling. Once you have located the position and shift you want to schedule, simply click the link below the position title which reads Manually Staff Some [POSITION TITLE] Shifts. Once on the Manual Staffing Page for this particular position & shift, simply choose either Schedule with Auto-Accept or Schedule with Seek Reply for each employee you wish to manually schedule for this event then click the Manually Staff... button at the bottom of the page.

Manually Staff the Wait Staff 4:30 PM to 6:30 PM Position for the E00259: ABC Corporate Dinner Event





Event Date: Saturday January 22, 2005

Event Time: 4:30 PM to 10:00 PM

Manual Staffing Icon Legend

-  This employee currently has no scheduling conflicts with this event.
-  **CAUTION:** This employee is currently scheduled for ANOTHER event on this date. Selecting this employee for this new shift WILL NOT remove them from their other obligations for this date! Hold your mouse over the staff member's icon to see which event to which they are already assigned.
-  **EXTREME CAUTION:** This employee is currently scheduled for another position for THIS event. If you choose this employee for this new position, they will be moved from the old shift to the new one. To see to which position & shift this employee is currently assigned, hold your mouse over the staff member's icon.
-  This employee has requested this day off.

Choose Up To 10 Staff Members Below

Do Not Schedule	Schedule with Auto-Accept	Schedule with Seek Reply	Wait Staff Staff	Staff Member Notes
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Charlie Brown	 Charlie is Scheduled for 1 Shifts & 7 Hours during this particular week.
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Fred Flintstone	
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Wilma Flintstone	 Wilma is Scheduled for 1 Shifts & 7 Hours during this particular week.
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Jane Jetson	 Jane is Scheduled for 1 Shifts & 7 Hours during this particular week.
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Judy Jetson	 Judy is Scheduled for 1 Shifts & 7 Hours during this particular week.
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Mickey Mouse	 Mickey is Scheduled for 1 Shifts & 7 Hours during this particular week.

Manually Staff the 4:30 PM to 6:30 PM Wait Staff Shifts

Cancel

Staffing Requirements

This event is currently \$700.00 UNDER budget

. : Add More Shifts to This Event : .

Publishing Options >> ALL 1 2 3 4 5 SEL REP

>> 10 Wait Staff Employees (Still Need: 10)

4:30 PM - 6:30 PM (Approx. 6:30 PM)

[Manually Staff Some Wait Staff Shifts](#) | [Remove Some Vacant Wait Staff Shifts](#)

There are no employees yet scheduled for this shift!

>> 5 Wait Staff Employees (Still Need: 5)

6:30 PM - 10:00 PM (Approx. 10:00 PM)

[Manually Staff Some Wait Staff Shifts](#) | [Remove Some Vacant Wait Staff Shifts](#)

There are no employees yet scheduled for this shift!

Publishing Work Opportunities to Your Service Staff

Publishing an event accomplishes two tasks, it makes the event visible on the calendars of staff members to whom you have chosen to publish the event AND it sends a notification email to those in the publish group who are qualified to work positions still available for this event.

The questions you must ask and answer are "To whom do I wish to publish this event?" and "Which publishing method should I use?" Like we discussed earlier in the Quick Start Guide, Selective Publishing is, by far, the most unique and most popular publishing option, but we will discuss Publishing to All and Publishing to Levels before turning our attention to the Selective Publishing option.

You can find StaffMate Online's publishing options on the top right side of the Staffing Requirements Section of the Event Management Page.

Publish to All: With one simple click of the ALL button, you can publish this event to each of your staff members. This will allow every staff member to see this event on their staff calendars and will send a notification email, with all vital event details, to each of the staff members qualified to work positions still available for this event.

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

Publish to Levels (1-5): With one simple click of any of the 1-5 buttons, you can publish this event to each of your staff members within that particular level. This will allow every staff member in that level to see this event on their staff calendars and will send a notification email, with all vital event details, to each staff member within this level qualified to work positions still available for this event.

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

Publish Selectively: To publish selectively, simply click on the SEL publishing option. This will transport you to the Selective Publishing Page which will allow you to choose, one position type at a time, to which employees you wish to publish this event. If an employee is qualified to work more than one position required for this event, they will receive just one notification, but it will list all of the positions for which this employee is qualified.

Publish to Which Wait Staff Employees?

:: Return to the ABC Corporate Dinner Event Management Screen ::

<input type="checkbox"/> Charlie Brown	1 Shift & 7 Hours	<input type="checkbox"/> Fred Flintstone		<input type="checkbox"/> Wilma Flintstone	1 Shift & 7 Hours
<input checked="" type="checkbox"/> Jane Jetson	1 Shift & 7 Hours	<input type="checkbox"/> Judy Jetson	1 Shift & 7 Hours	<input type="checkbox"/> Mickey Mouse	1 Shift & 7 Hours
<input checked="" type="checkbox"/> Betty Rubble		<input type="checkbox"/> Jack Sprat		<input checked="" type="checkbox"/> Spongebob Squarepants	
<input type="checkbox"/> Patrick Star		<input checked="" type="checkbox"/> Squidward Tentacles		<input checked="" type="checkbox"/> Lucy Van Pelt	

To publish the ABC Corporate Dinner Event to the Wait Staff employees selected above, click the "Publish to Chosen Wait Staff Employees" button below. This will publish the event to selected Wait Staff employees and complete the selective publishing process.

[Publish to Chosen Wait Staff Employees](#)

As you cycle through each position type needed for this event, only those staff members qualified to work each position will be listed. This allows you to keep track of how many employees of each position type you are selecting.

If a staff member's check box is checked and disabled, either you have already manually scheduled them to work this event or you have already published the event to him/her.

If you are trying to be fair with work opportunities, StaffMate Online shows you how many shifts and how many hours for which each employee is already scheduled during the work week in question.

Once you have check marked each employee to which you wish to publish this event, simply click the *Publish to Chosen [POSITION TITLE] Employees* button. If you have additional position types that are required for this event, you will be returned to the Selective Publishing Page and presented with the next position title and those employees qualified to work it. This will continue until you have cycled through all position types and are transported to the Published-To List showing to whom you have published the event.

Quick Start Guide Conclusion

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

If at any time during your exploration you have questions, comments and/or concerns, feel free to contact StaffMate via email at support@staffmate.com or call us toll-free at 1-888-782-3341.