Knowledge Services presents:

Getting Started with dotStaff™

Vendor

the right resource. the right time. the right price.

www.dotStaff.com

317.806.6161

Getting Started with dotStaff™

Key Buttons

Add	Save	Open	Calendar	Refresh	Close	Accept	Reject	Edit

Upload Resume	Include All	Include One	Remove One	Remove All	Delete	Save as a Template

Submit	Repost	Print	Show All Activity	Show Most Recent 30-Day Activity	Cancel	Clear Filter	Close

How to Register

TO DO THIS	DO THIS
Login	1. Go to www.dotStaff.com and click the “Login” button. 2. On Login form, enter your email address on the Account: line. 3. Select the “New User? Register” link. 4. Answer the two questions that appear and click “Login”.
Create a Password	1. On the ‘Create Password’ form, enter a new password. 2. Confirm the new password. 3. Create two questions with associated answers that only you would know. 4. Press “Continue”.
Complete the Registration	1. On the dotStaff™ Welcome screen, read the User Agreement form and click “I Agree to USER Agreement” 2. Complete Account fields and re-enter your challenge questions and answers. ⓘ A concise, but accurate description of the company’s business should be included. This description is displayed for viewing by clients in dotStaff™. 3. Press “Next”.

How to Login

TO DO THIS	DO THIS
Login 	1. Go to www.dotStaff.com and click the “Login” button. 2. Enter your email address on the Account line. 3. Enter your password on the password line. 4. Click the “Login” button.

How to Reset Your Password

TO DO THIS	DO THIS
Change Your Password	1. Navigate to **My Account>Change Password**. 2. On the Change Password form, enter the Old Password. 3. Enter a New Password. 4. Confirm the New Password. 5. Click the “Save” button.

How to Modify Company Account Information

TO DO THIS	DO THIS
Edit Company Account Information 	1. Navigate to **Company Settings>Company Account**. 2. Click the “Edit” button to modify the content. 3. Click into the specific field requiring change. 4. Click the “Save” button to retain the changes made. 5. Click the “Login” button.

How to Add a New User or Resource

TO DO THIS	DO THIS
Add an Account 	ⓘ A Vendor Administrator may add a User* or a Resource. A User may add a Resource. **A User might be a Recruiter, an Account Representative, or an Accounts Receivable Representative.* 1. Navigate to **Records Mgt>User List**. 2. Click the “Add” button. 3. Complete the Registration form. * *All fields are required*. A. Enter an Email address for the user. The Email address is not only the method of communication, but is also the user's non-editable dotStaff™ log in. 4. Enter the First Name of the new user. 5. Enter the Last Name of the new user.
Create Challenge Questions / Answers	Enter two Challenge Questions and Answers. ⓘ Two challenge questions and answers ensure account security. ⓘ Answers will not be emailed to the individual. The individual must know the answers when registering the account.

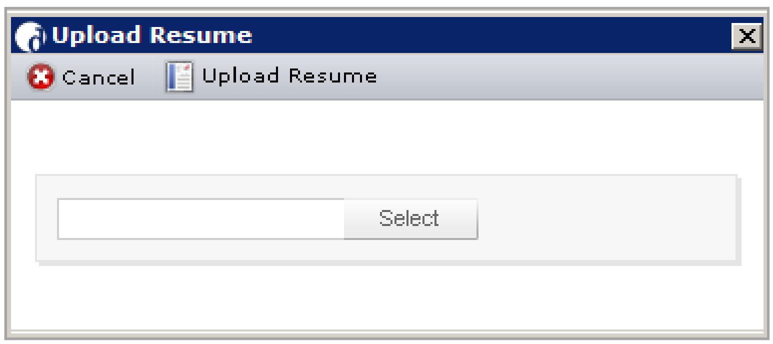
Select User Type	1. Ensure that the desired radio button is selected - *User* or *Resource*. 2. Click the “Save” button. The User List will appear with the newly added user. ⓘ dotStaff™ sends an email to the individual inviting him or her to register. ⓘ If adding a Resource account, a blank online resume will be created for the resource.

How to Build a Resume

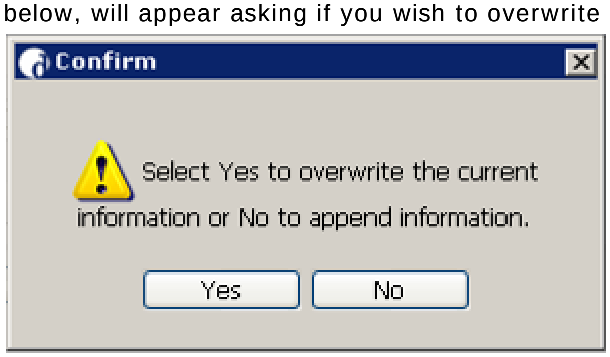
TO DO THIS	DO THIS
Access a Resume	1. Navigate to **Records Mgt>Resume List**. 2. To view and edit the individual’s resume, double click anywhere on the relevant Resource’s record. 3. Click the “Edit” button. 4. For a resume in which information has been entered, beyond the Overview section, access the line item by double clicking on it in the data grid. 5. To edit the information displayed, click the pop-up window’s “Edit” button.

Parse a Resume

1. Click the “Upload Resume” button.
2. In the “Upload Resume” window, click the “Select” button.



3. The “Choose file” window will appear. Using the “Look in” field, navigate to the desired file folder and click once on the resume file to parse.
4. See the file listed in the “File name” field and click the “Open” button.
5. Back in the “Upload Resume” window, the file’s address will be in the “File to attach” field. Click the “Upload” button to complete the parsing process. A confirmation window, shown below, will appear asking if you wish to overwrite or append.



6. Click the “Yes” button to add a new resume or overwrite the current information. Click the “No” button to append (add to) the existing information.
7. Once the system processes the file content, information will be displayed in the various resume fields. Modify as is needed.

   ⓘ The parsed resume will automatically be attached and display in the “Attach Files” section.
8. Be sure to press the “Save" button in the upper left corner of the pop-up!

Describe Resource Objectives	In the **Resume Overview** section, complete the fields including Career Objective, Comments, Career Level, and Desired Position Type.
Add Skills	1. Open the **Skills** area. 2. Mark each Category in which your skills reside and click the "Next" button. 3. Select the radio button for the desired Skill Type filter option. • From the Listed Skill Type option, the Skills Master List displays Subcategories and Skills within each Category selected on the previous screen. • From the Non-Listed Skill Type option, drop-down lists are provided for a Category and a Subcategory as well as an area to name the non-listed skill being added. 4. After checking the Category/Subcategory/Skill for a Listed skill, or providing a name for a Non-Listed skill, click the down arrow to add the skill. Your screen will refresh. 5. In the Added Skills section, use the drop downs to select Years of experience, career Level reached, freshness of skill from Last Used, and if the skill is Required or just desired to be used. ⓘ More than one skill may be selected at a time. 6. Be sure to press the "Save" button in the upper left corner of the pop-up!
Specify Experience	1. Open the **Experience** area. 2. Identify the Company at which the experience was realized. 3. Include the Job Title held. 4. Define the length of the engagement using the Start and End fields. 5. Key Skills Used as well as Roles and Responsibilities can be described in the fields provided. 6. Click the "Save" button. 7. To include additional instances of work Experience, repeat starting at Step 1.
List Education	1. Open the **Education** area. 2. Enter the name of the School attended, a required field. 3. From the drop down, select the Degree earned. 4. Identify the focus of study in the Major/Minor field. 5. Using the City, State, and Country fields, indicate the school's location. 6. Click the "Save" button. 7. To list additional Degrees or Schools attended, repeat starting at Step 1.
Note Certifications	1. Open the **Certifications** area. 2. Identify the certifying Organization, a required field. 3. Enter the Title of the Certification, if desired. 4. Specify the date on which the certification was attained. 5. Click the "Save" button. 6. To add additional certifications, repeat starting at Step 1.
Provide References	1. Open the **References** area. 2. Enter the Reference's Name, a required field. 3. Add the Reference's Title, if desired. 4. Provide a phone number. 5. Click the "Save" button. 6. To add additional references, repeat starting at Step 1.

Attach Files

(Attachments)

1. Open the **Attachments** area.
2. Enter a File Name, a required field, and click the “Select” button.
3. The “Choose file” window will appear. Using the “Look in” field, navigate to the desired file folder and click once on the file.
4. See the file listed in the “File name” field and click the “Open” button.
5. Back in the “Upload Your Files Below” window, see that the file’s address is in the “File to Attach” field and click “Upload”.
6. To complete the file attachment, click the “Save” button.

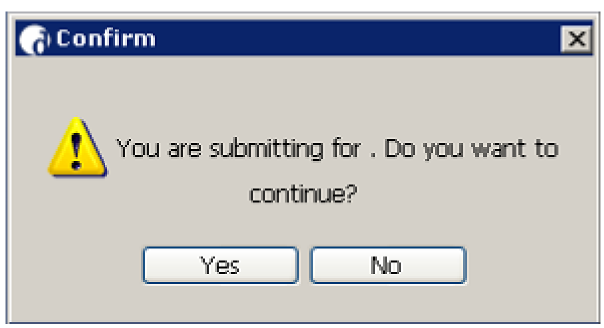
How to Submit a Bid

TO DO THIS — DO THIS

Submit a Bid

1. Navigate to **Opportunity Mgt>Client Postings**.
2. Open the posting of interest by double clicking on it in the data grid.
3. Select the “Make a Bid” tab.
4. Identify the Resource to include on the bid.
   - From the “Select a Resource” table, choose an existing Resource to include.
   - Add a new User or Resource to include using the “Create a New Resource” table.
     1. Complete all fields in the table
     2. Identify the individual’s status with the appropriate radio button
     3. Click the “Upload Resume” button to parse a resume. See *“How to Build a Resume – Parse a Resume”* above for detailed steps.
5. Scroll to the Bid Information area and enter all applicable Rate Details.

   ⓘ See * for subsequent information for bidding on specific posting types.
6. Click the “Submit Bid” button. A confirmation window, shown below, will appear asking if you wish to continue.



7. Click the “Yes” button to submit this bid or click the “No” button. Both options refresh to the “Make a Bid” tab.

*** Staff Augmentation**

1. In the **Bid Information** area, enter hourly billing rate
2. Complete the “Bid Grid” if applicable. Define “rate differentials” as apply to each sort. (example below)

Shift Details

Differential	Shift	Description	ID
1.0	Day Shift		25

Overtime Details

Differential	Overtime	Description	ID
1.5	Overtime 1		2

Holiday Details

Differential	Holiday	Description	ID
1.5	Christmas		11
1.5	Thanksgiving		13

Weekend Details

Differential	Weekend	Description	ID
No records to display.			

3. An optional Comments field is available to provide additional information.
4. Click the “Submit Bid” button.

*** Contract to Hire**

1. Select or create the Resource to include on the bid.
2. In the **Bid Information** area, enter the billing rate in the Hourly rate field.
3. Enter the expected salary in the Salary field.
4. Select the Commission type (percentage or fee based) and enter the commission amount without symbols (% nor $).
5. If displayed, complete the “Bid Grid.”
6. Add comments in the field provided if desired.
7. Click the “Submit Bid” button.

*** Direct Hire**

1. On the **Bid Information** page, enter the expected salary in the Salary field.
2. Designate Commission type (percentage or fee based) and enter the commission amount without symbols (% nor $).
3. Select the “Make a Bid” tab.
4. A Comments field is available for further clarification.
5. Click the “Submit Bid” button.

*** Project**

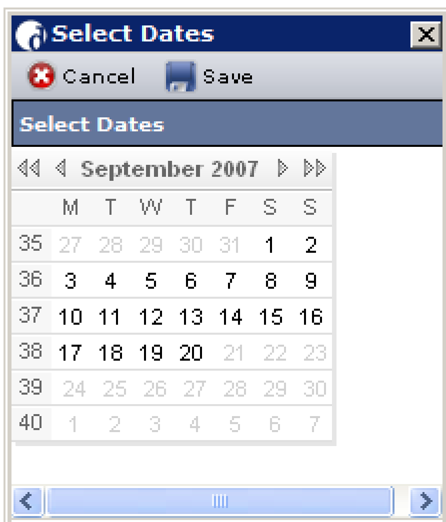
1. On the **Bid Information** page, click the drop down arrow to select the Contact of interest.
2. Enter the Amount without symbols (% nor $).
3. Use the Comments field if further clarification is needed.
4. Click the “Submit Bid” button.

How to Track or Modify a Bid

TO DO THIS	DO THIS
Track a Bid	1. Navigate to **Opportunity Mgt>Submitted Resumes**. 2. View bids of interest by using the standard data grid sort and filter features. The Status column identifies the stage at which a bid resides.
Modify a Bid	1. Navigate to **Opportunity Mgt>Submitted Resumes**. 2. Locate and open the bid of interest by double clicking on it in the data grid. 3. Select the “Bids” tab and, if necessary, click on the “Show All” button. 4. Locate the Resource for which you wish to edit the bid and double click to open it.

	5. On the Bid Information page, edit the bid as is needed. 6. Click the “Submit Bid” button.

How to Create a Time Entry

TO DO THIS	DO THIS
Create a Time Entry	1. Navigate to **Time\Project Mgt>Add Timesheet**. 2. In the “Enter Time For” field, use the drop down arrow and select the appropriate Resource. ⓘ If the Resource logs in to create the time entry, only his/her name will be listed in this field. 3. Contract details are displayed in the bottom left of the window. Only one contract should appear in the drop down. 4. Select the proper “Project” field entry and if applicable, designate a “Category.” 5. Use the calendar buttons to enter both the Start and End Dates for the time worked. The End date will default to the Start date selected. 6. Mark the Start Time and End Time, ensuring to select AM or PM. For the End Time, enter the number of hours WORKED rather than when the shift ended. Do not include time on a “lunch break” as the dotStaff™ system will not calculate an assumed break. ⓘ Remember that midnight is 12am and Noon is 12pm. 7. If further details are necessary, enter them in the “Description” field. 8. Click the “Save” button.
Copy a Time Entry  	1. Following the creation of a Time Entry, the screen refreshes to display the completed entry. At this point, the Time Entry can be copied. Click the “Copy Time” button. 2. The “Select Dates” window will open displaying a calendar. Use this calendar to select the additional date or dates onto which the most recent time entry is to be copied. Do so by clicking on each date to which the entry should be copied.  3. Click the “Save” button. 4. A window displaying the confirmation message, “Successfully created timesheet entries for the selected date/s.” will be displayed. Click the “OK” button and the screen returns to the Time Sheet Entry window. ⓘ The bar graph displayed in the lower right corner defaults to today’s date, so a copied entry may not appear in the “Day of the Week” graph. 5. Click the Time Sheet Entry window’s “Save” button to retain all entries made.

How to View Timesheets

TO DO THIS	DO THIS
View Timesheets	1. Navigate to **Time\Project Mgt>Timesheets Placed**. 2. Click the "Show All" button to bring forward all timesheets placed. Click the "Recent Activity" button to limit the display to those placed within the last 30 days. 3. Results can further be filtered. Enter the relevant search term in the relating column, click the drop down button, and choose the appropriate filter parameter (i.e. Contains, Starts With, Equal To, etc.) 4. Results displayed can be exported to Excel 2007 , Word 2007 , Excel 2003 , and Word 2003 by clicking on the corresponding button and opting to save the file.

How to Edit a Timesheet (denied or incorrect)

TO DO THIS	DO THIS
Edit Timesheets Edit	1. Navigate to **Time\Project Mgt>Timesheets Placed**. 2. Click the "Show All" button to bring forward all timesheets placed. Click the "Recent Activity" button to limit the display to those placed within the last 30 days. 3. Results can further be filtered. Enter the relevant search term in the relating column, click the drop down button, and choose the appropriate filter parameter (when entering a date, such as 04/15/2008, choose the **Equal To** filter. When entering a status, such as "Denied," choose the **Contains** filter.) 4. Double click on the line item that needs to be corrected. 5. Select the "Edit" button. 6. Edit the information as needed, by re-entering the hours correctly, if this was the issue. 7. In the gray action tool bar, click the "Save" button after you have edited the timesheet.

How to Reconcile a Payment

TO DO THIS	DO THIS
Reconcile a Payment	1. Navigate to **Time\Project Mgt>Timesheets Placed**. 2. Sort the data grid using the Vendor Payment Number column options. 3. For additional insight, open a line item by double clicking on it.