

**Product Release Notes for Rosterfy 2.0**

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## General

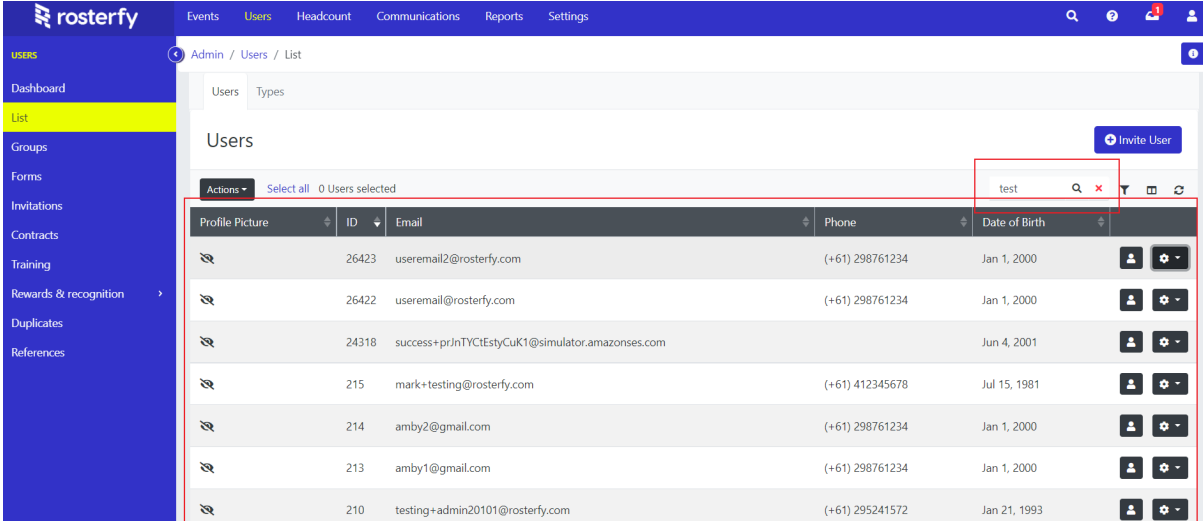
Please note - all employee data you may see is dummy data and not sensitive

### Quick Search Function Added across Platform

A major update, we have added a 'quick search' function across all dashboards across the platform. This will allow Admins to more quickly search for and receive basic information. The quick search will target, broadly any of:

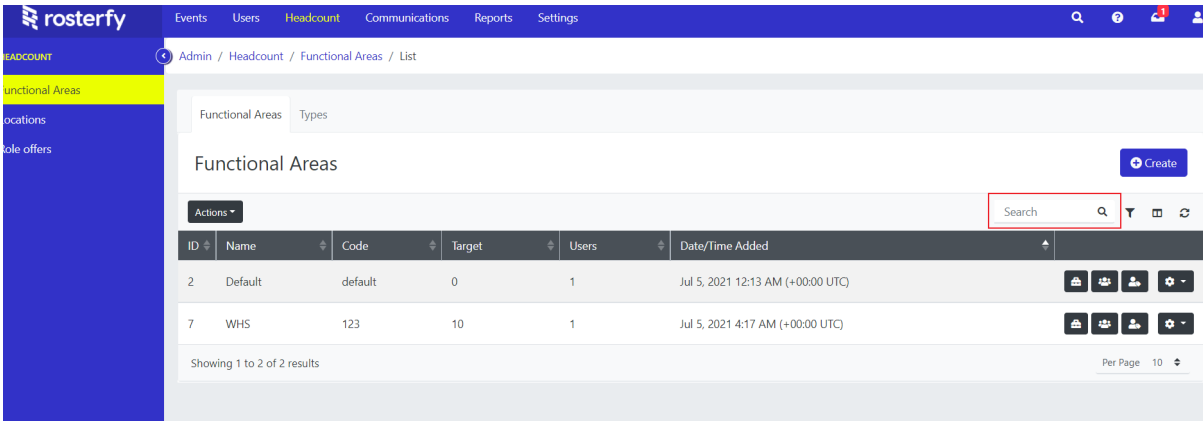
- ID
- Name attributes
- Any other attributes that have been tagged as 'quick searchable'

Note - depending on the number of values in the list, the quick search may take some time to process (searching against a list of 30,000 users for example may take a few minutes).



The screenshot shows the 'Users' dashboard in Rosterfy. A search bar at the top right contains the text 'test'. Below the search bar is a table of users with the following columns: Profile Picture, ID, Email, Phone, Date of Birth, and action icons. The table contains 7 rows of dummy data.

Profile Picture	ID	Email	Phone	Date of Birth	Action
	26423	useremail2@rosterfy.com	(+61) 298761234	Jan 1, 2000	
	26422	useremail@rosterfy.com	(+61) 298761234	Jan 1, 2000	
	24318	success+prJnTYCtEstyCuK1@simulator.amazonses.com		Jun 4, 2001	
	215	mark+testing@rosterfy.com	(+61) 412345678	Jul 15, 1981	
	214	amby2@gmail.com	(+61) 298761234	Jan 1, 2000	
	213	amby1@gmail.com	(+61) 298761234	Jan 1, 2000	
	210	testing+admin20101@rosterfy.com	(+61) 295241572	Jan 21, 1993	



The screenshot shows the 'Functional Areas' dashboard in Rosterfy. A search bar at the top right contains the text 'Search'. Below the search bar is a table of functional areas with the following columns: ID, Name, Code, Target, Users, and Date/Time Added. The table contains 2 rows of dummy data.

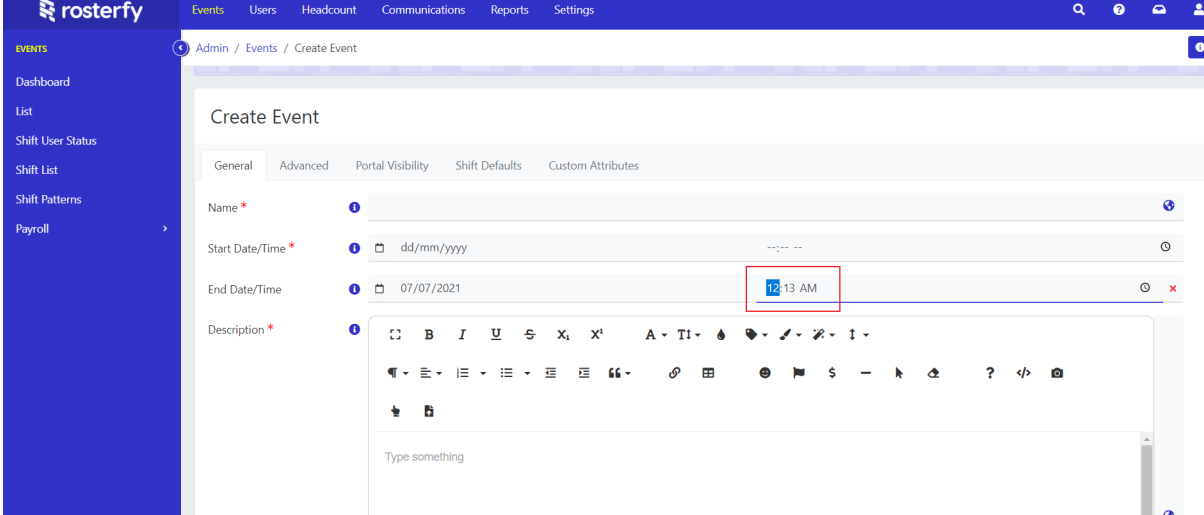
ID	Name	Code	Target	Users	Date/Time Added	Action
2	Default	default	0	1	Jul 5, 2021 12:13 AM (+00:00 UTC)	
7	WHS	123	10	1	Jul 5, 2021 4:17 AM (+00:00 UTC)	

Showing 1 to 2 of 2 results

Per Page 10

## Typable Time Entry

Across the entire platform, based on feedback we have updated time entry to be type-able now. This will allow users to more quickly type in time fields.



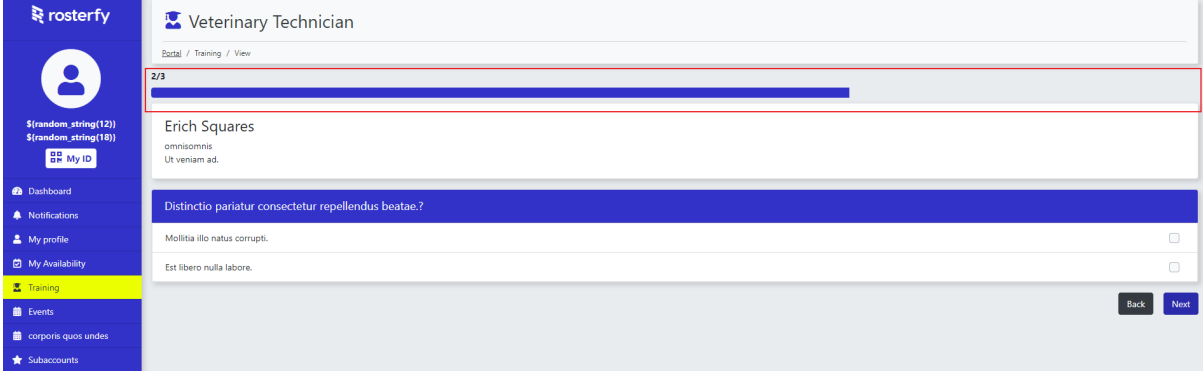
The screenshot displays the 'Create Event' form in the Rosterfy application. The form is divided into several tabs: 'General', 'Advanced', 'Portal Visibility', 'Shift Defaults', and 'Custom Attributes'. The 'General' tab is active. The form fields include:

- Name \***: A text input field.
- Start Date/Time \***: A date and time picker showing 'dd/mm/yyyy' and a time dropdown.
- End Date/Time**: A date and time picker showing '07/07/2021' and a time dropdown set to '12:13 AM'. This time dropdown is highlighted with a red box.
- Description \***: A rich text editor with various formatting options (bold, italic, underline, link, unlink, text color, background color, bulleted list, numbered list, indent, outdent, quote, code, link, unlink, image, video, table, table of contents, undo, redo, help, source code, insert link, insert image) and a text area with the placeholder 'Type something'.

## Progress Bar on Multi-Page Forms

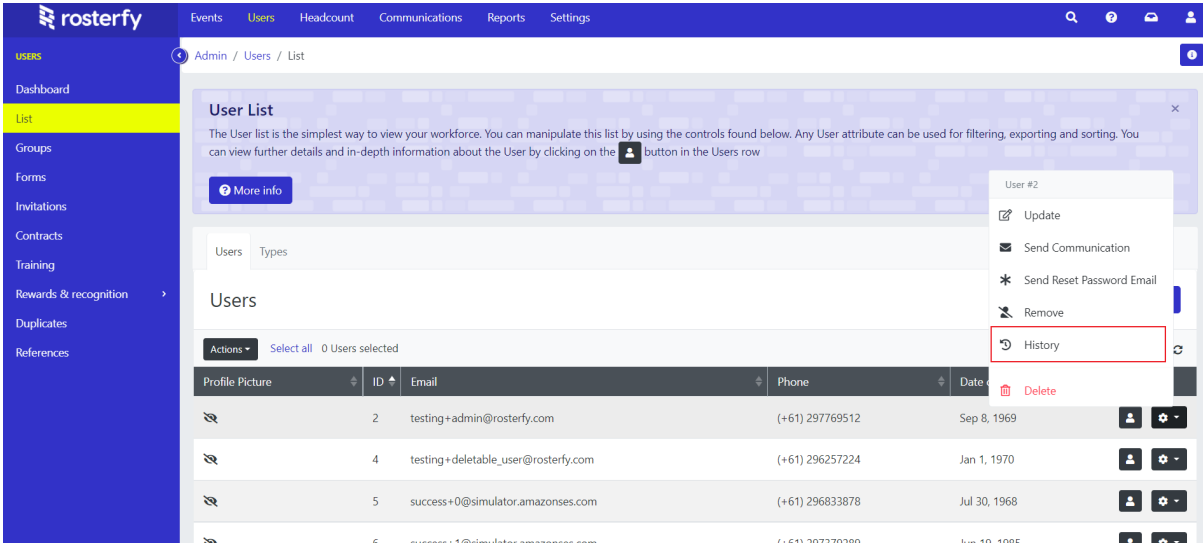
A visual update only, all multi-page forms now for Candidates will show a progress bar at the top of the form, as per the screenshot below. This will be based on pages only, not form fields.

(note - the sample form content in the screenshot is not intended to be real, the content is just filler for visualisation purposes only)



## Data Edit History Improved

Edit history that was recently included across the platform, has been improved so that it now shows additional details of the edit: user who actioned it, the prior (original) data entry, as well as still date/time stamp and data edits.

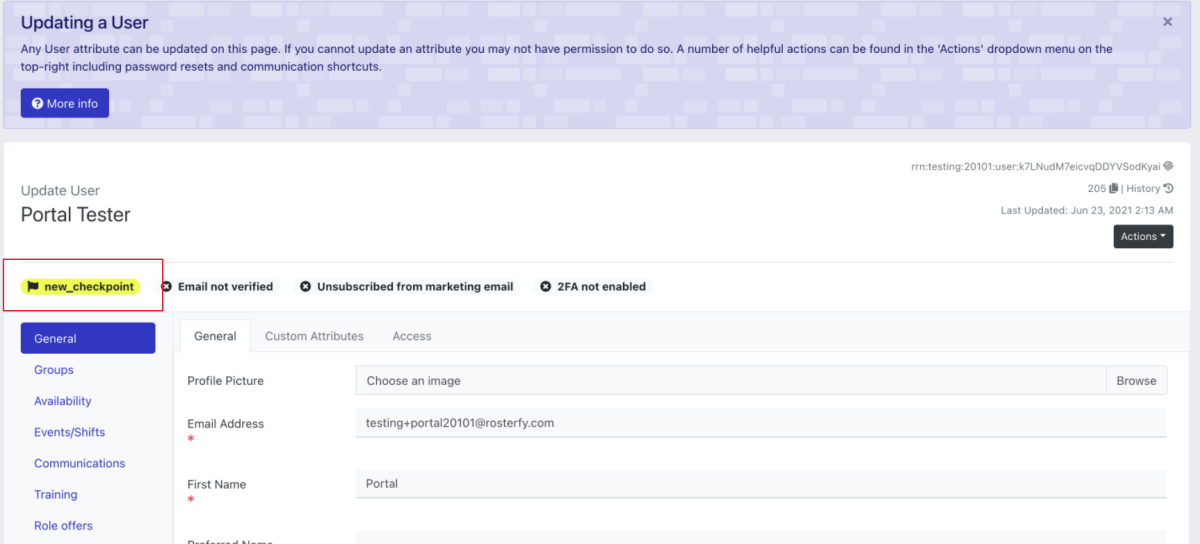


Profile Picture	ID	Email	Phone	Date	
	2	testing+admin@rosterfy.com	(+61) 297769512	Sep 8, 1969	
	4	testing+deletable_user@rosterfy.com	(+61) 296257224	Jan 1, 1970	
	5	success+0@simulator.amazonses.com	(+61) 296833878	Jul 30, 1968	
	6	success+1@simulator.amazonses.com	(+61) 297379289	Jun 19, 1985	

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## User Checkpoint in Secondary Colour

A Small visual update, recently we introduced a user's checkpoint at the top of their profile (viewable on the Admin site) - based on feedback we have updated this to be in your account's secondary colour so it is more contrasted.



Updating a User

Any User attribute can be updated on this page. If you cannot update an attribute you may not have permission to do so. A number of helpful actions can be found in the 'Actions' dropdown menu on the top-right including password resets and communication shortcuts.

More info

Update User  
Portal Tester

rrn:testing:20101:user:k7LnudM7eicvqDDYVSodKyal  
205 | History  
Last Updated: Jun 23, 2021 2:13 AM  
Actions

new\_checkpoint

Email not verified | Unsubscribed from marketing email | 2FA not enabled

General | Custom Attributes | Access

General

Groups  
Availability  
Events/Shifts  
Communications  
Training  
Role offers

Profile Picture  
Choose an image  
Browse

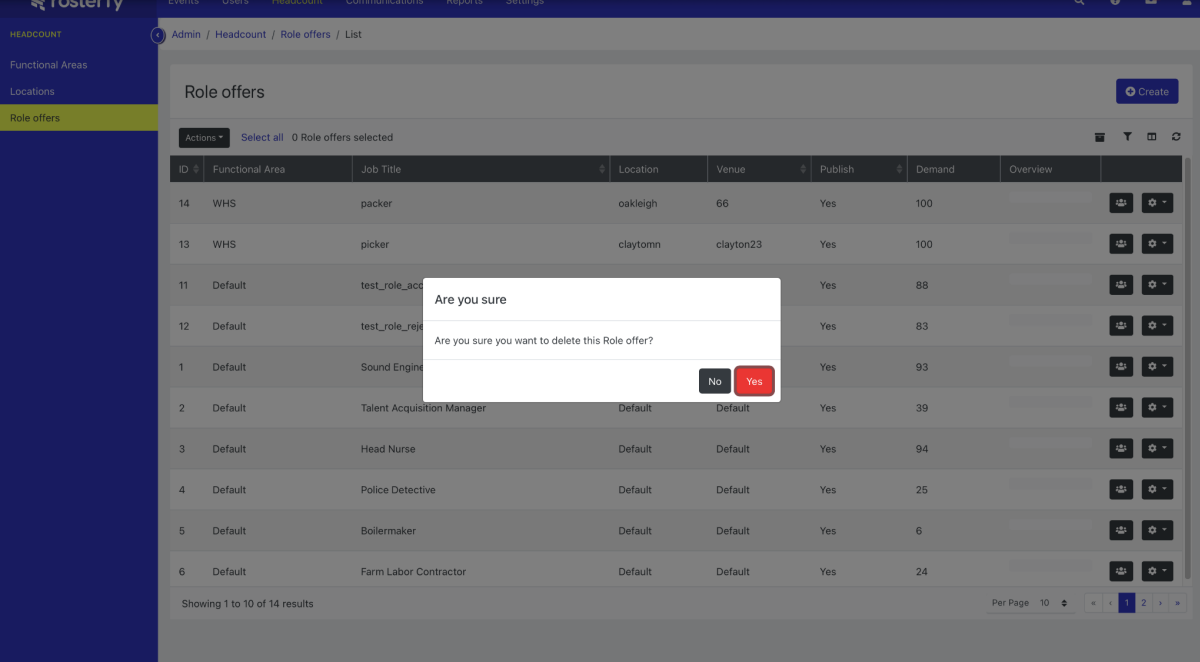
Email Address  
testing+portal20101@rosterfy.com

First Name  
Portal

Preferred Name

## Popups can be Confirmed by pressing Enter

A small UX update, across the Rosterfy platform wherever there are popups (like the Are you sure popup shown below), the Yes button is now auto focused. This means that Admins can press the 'Enter' key to complete these tasks faster.



Role offers

Create

Select all 0 Role offers selected

ID	Functional Area	Job Title	Location	Venue	Publish	Demand	Overview
14	WHS	packer	oakleigh	66	Yes	100	
13	WHS	picker	claytonm	clayton23	Yes	100	
11	Default	test_role_acc			Yes	88	
12	Default	test_role_rej			Yes	83	
1	Default	Sound Engineer			Yes	93	
2	Default	Talent Acquisition Manager	Default	Default	Yes	39	
3	Default	Head Nurse	Default	Default	Yes	94	
4	Default	Police Detective	Default	Default	Yes	25	
5	Default	Boilermaker	Default	Default	Yes	6	
6	Default	Farm Labor Contractor	Default	Default	Yes	24	

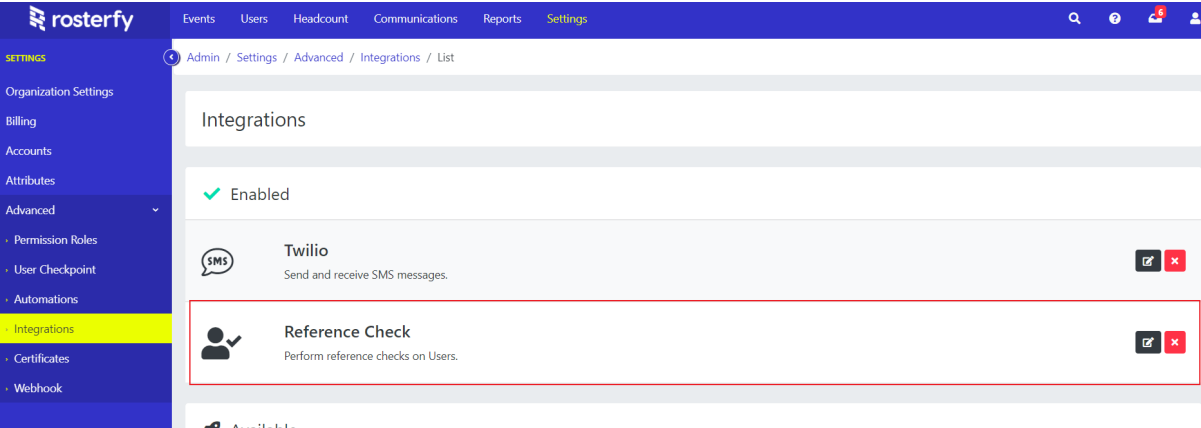
Showing 1 to 10 of 14 results

Per Page 10 1 2

## Reference Check Module

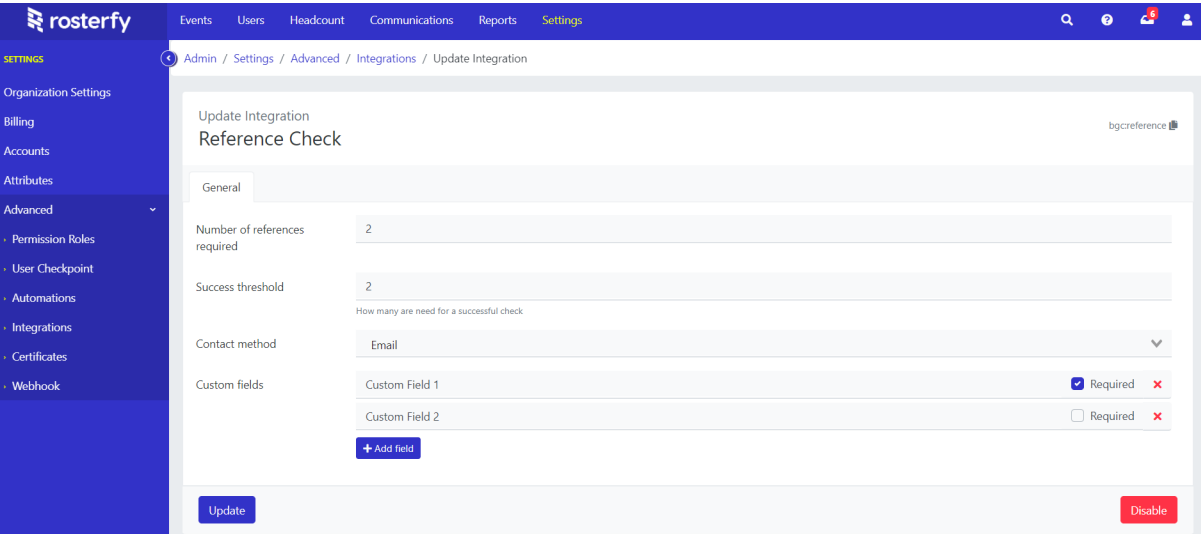
A Reference Check module has been created, where Reference Checks can be managed by Admins. This can be set up in the integrations section of Settings if it is enabled for you. Please chat to your CS Manager if you'd like to use this feature.

There are a number of settings; Reference Required refers to the amount of references sought. Success threshold refers to the number of successful references need for a passed Reference Check status. The status can be managed on the Background Check module of User Profiles.



The screenshot shows the Rosterfy Settings page. The left sidebar contains the following menu items: SETTINGS, Organization Settings, Billing, Accounts, Attributes, Advanced (expanded), Permission Roles, User Checkpoint, Automations, Integrations (highlighted), Certificates, and Webhook. The main content area is titled 'Integrations' and shows a list of enabled integrations. The 'Reference Check' integration is highlighted with a red box. It has a status of 'Enabled' and a description 'Perform reference checks on Users.'.

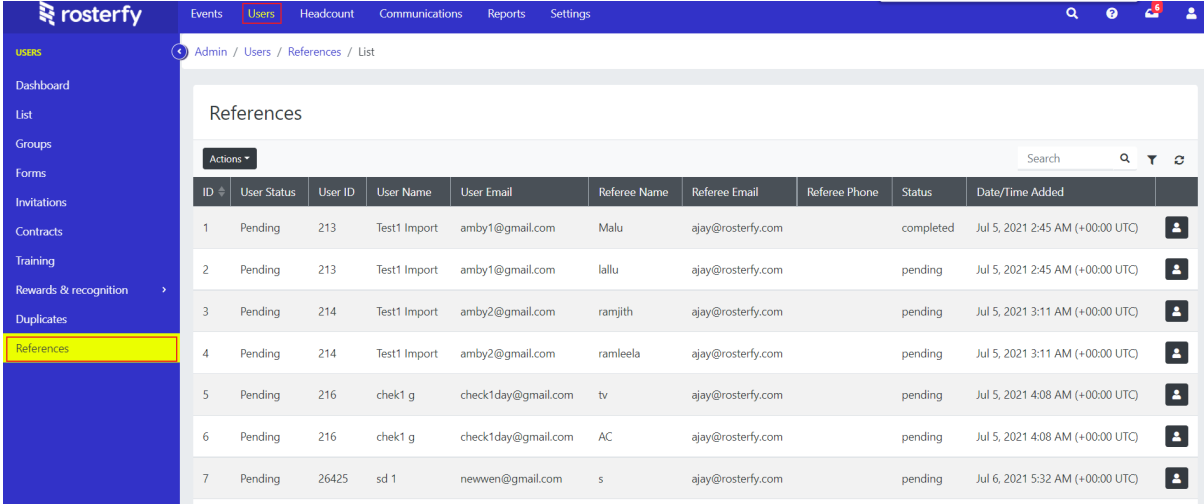
Integration	Status	Description
Twilio	Enabled	Send and receive SMS messages.
Reference Check	Enabled	Perform reference checks on Users.

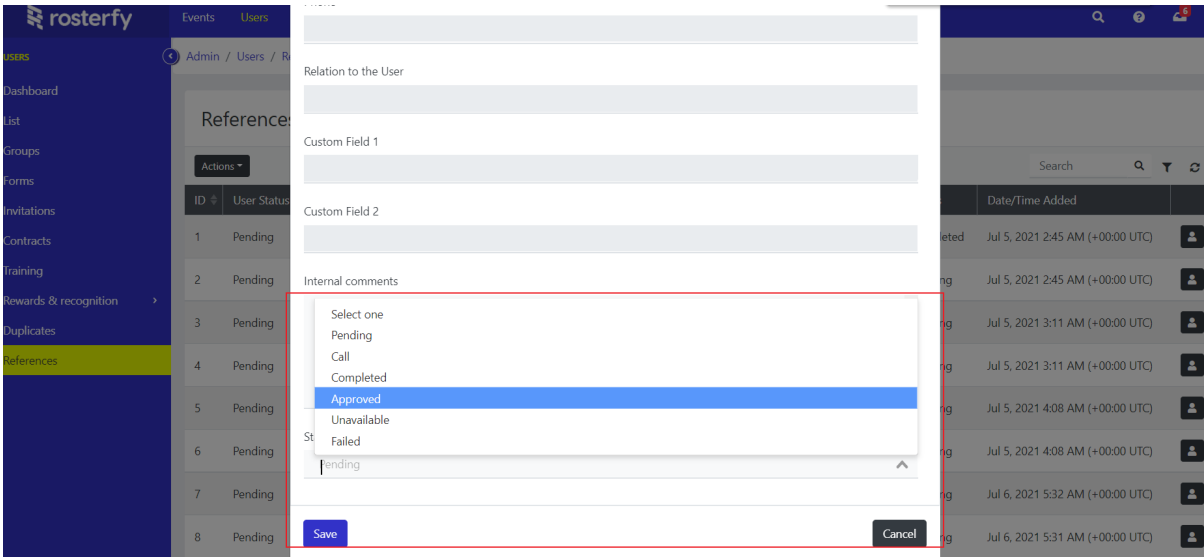
The screenshot shows the 'Update Integration' page for the 'Reference Check' module. The left sidebar is the same as the previous screenshot. The main content area is titled 'Update Integration Reference Check' and has a breadcrumb trail: Admin / Settings / Advanced / Integrations / Update Integration. The page contains the following fields:

- Number of references required: 2
- Success threshold: 2 (with a note: 'How many are need for a successful check')
- Contact method: Email (dropdown menu)
- Custom fields: Custom Field 1 (Required), Custom Field 2 (Required)

At the bottom of the page, there are 'Update' and 'Disable' buttons.



ID	User Status	User ID	User Name	User Email	Referee Name	Referee Email	Referee Phone	Status	Date/Time Added
1	Pending	213	Test1 Import	amby1@gmail.com	Malu	ajay@rosterfy.com		completed	Jul 5, 2021 2:45 AM (+00:00 UTC)
2	Pending	213	Test1 Import	amby1@gmail.com	lallu	ajay@rosterfy.com		pending	Jul 5, 2021 2:45 AM (+00:00 UTC)
3	Pending	214	Test1 Import	amby2@gmail.com	ramjith	ajay@rosterfy.com		pending	Jul 5, 2021 3:11 AM (+00:00 UTC)
4	Pending	214	Test1 Import	amby2@gmail.com	ramleela	ajay@rosterfy.com		pending	Jul 5, 2021 3:11 AM (+00:00 UTC)
5	Pending	216	chek1 g	check1day@gmail.com	tv	ajay@rosterfy.com		pending	Jul 5, 2021 4:08 AM (+00:00 UTC)
6	Pending	216	chek1 g	check1day@gmail.com	AC	ajay@rosterfy.com		pending	Jul 5, 2021 4:08 AM (+00:00 UTC)
7	Pending	26425	sd 1	newwen@gmail.com	s	ajay@rosterfy.com		pending	Jul 6, 2021 5:32 AM (+00:00 UTC)



Reference

Relation to the User

Custom Field 1

Custom Field 2

Internal comments

Select one

Pending

Call

Completed

Approved

Unavailable

Failed

Pending

Save

Cancel

This can be added with the 'add' button for **User Interaction** type Forms. This will show up on the form as per the screenshot below. Candidates will be required to enter Reference Checks, which will be recorded and



rosterfy

EventsUsersHeadcountCommunicationsReportsSettings

USERS

DashboardListGroupsFormsInvitationsContractsTrainingRewards & recognitionDuplicationsReferences

Admin / Users / Forms / Update Form

English (United States)

Actions

Reference Check TEST

GeneralAdvancedContent

Name \*Reference Check TEST

Type \*User Interaction

Available Fields

Address (User)

custom address attribute (User)

custom boolean attribute (User)

custom country attribute (User)

custom date attribute (User)

custom datetime attribute (User)

Active Fields

Page Break

Content

Referees

State

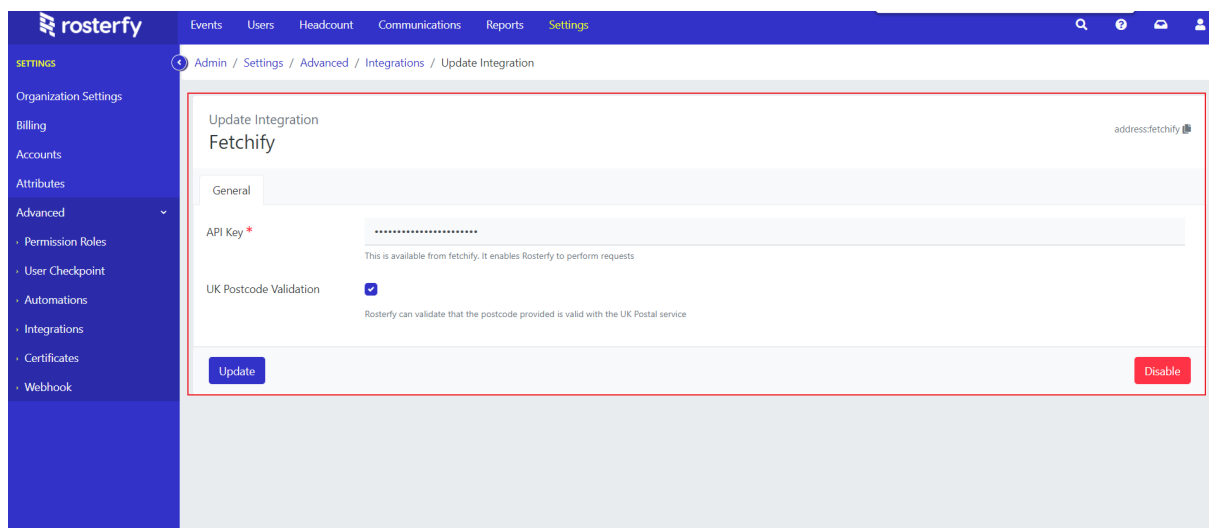
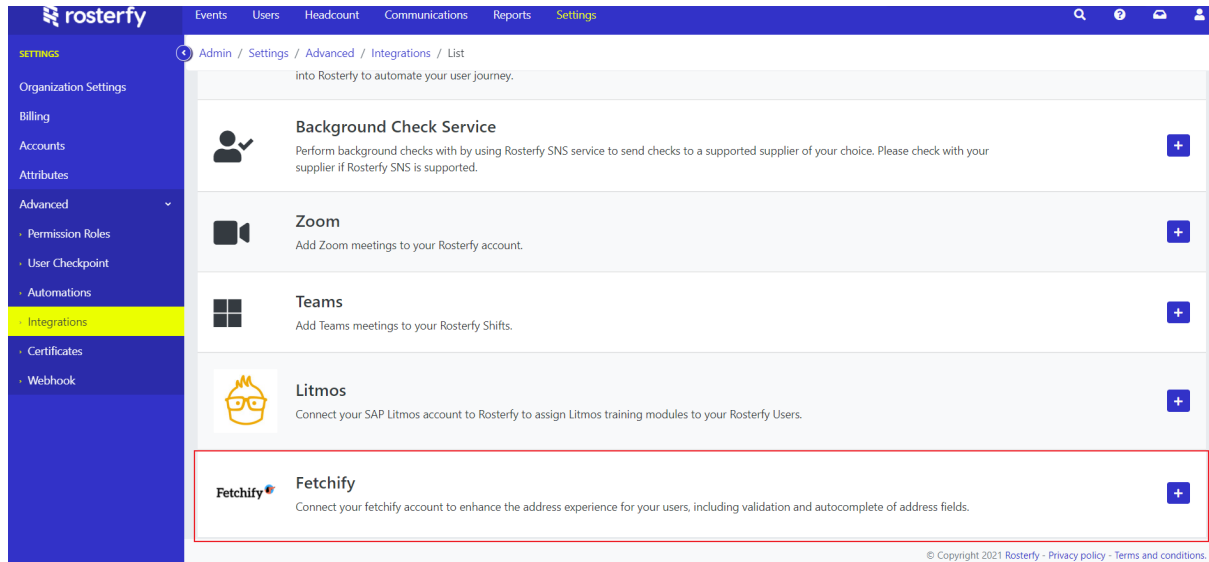
ref check

1.	Reference #1	test1@gmail.com	0400000000	Update
2.	Reference #2	test2@gmail.com	0400000000	Update

Close

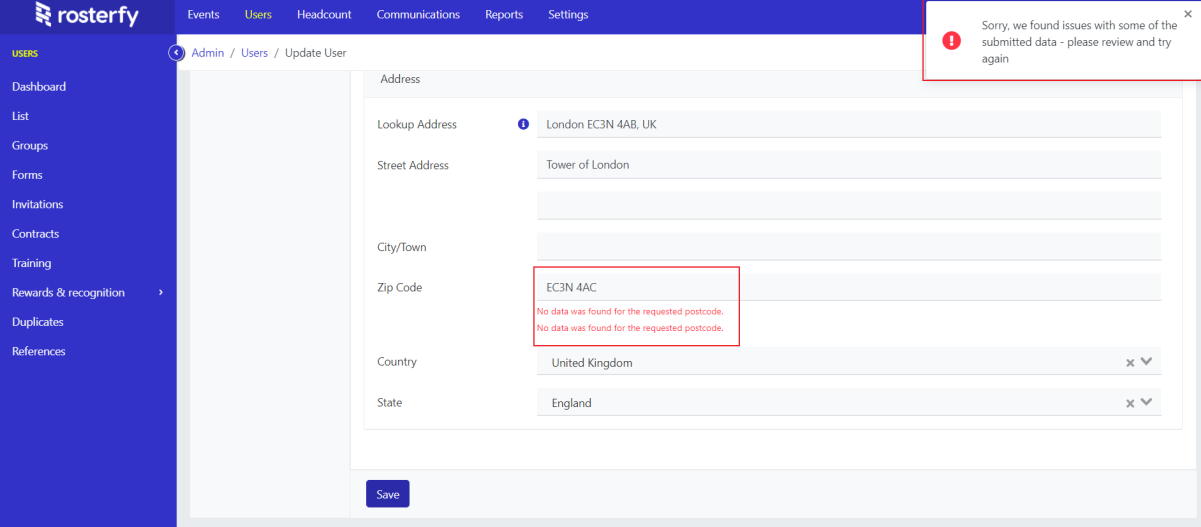
## Integration with Fetchify for a Post Code Validation check (UK only)

An integration has been built with Fetchify, which you will need a separate API key for. You can find this in Settings > Integrations, scrolling down on the list. This will help ensure postcode data captured in the system is 100% accurate (currently for the UK only).

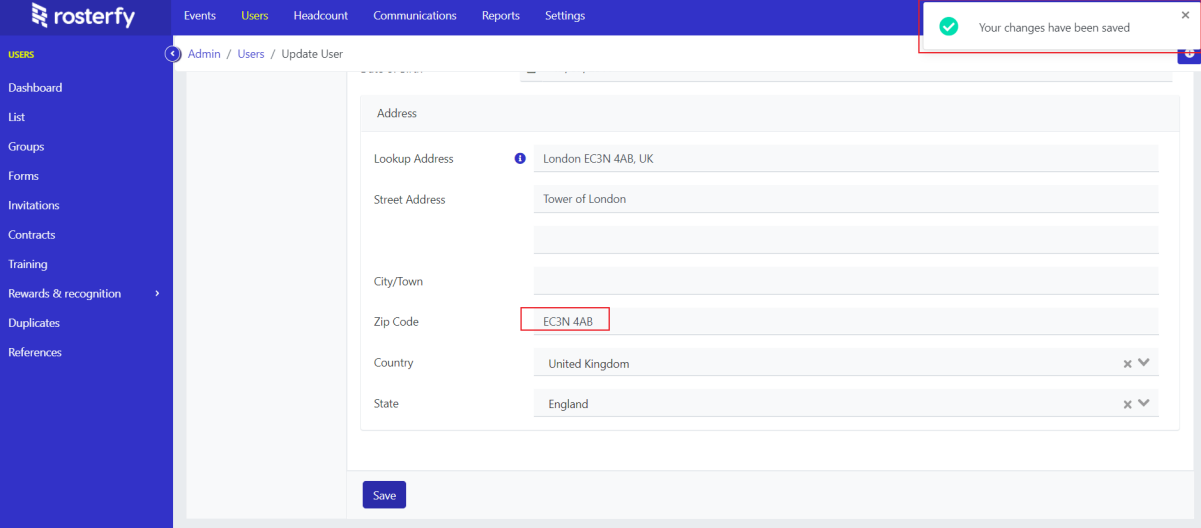


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If you try to save an incorrect UK postcode in any form or anywhere on the admin portal (see update user profile below) in the platform, it will fail and deliver an error message. This will pass if the postcode is correct and a real one.



The screenshot shows the 'Update User' form in the Rosterfy Admin Portal. The form is titled 'Address' and contains several fields: 'Lookup Address' (London EC3N 4AB, UK), 'Street Address' (Tower of London), 'City/Town' (empty), 'Zip Code' (EC3N 4AC), 'Country' (United Kingdom), and 'State' (England). A red box highlights the 'Zip Code' field, which contains the text 'EC3N 4AC'. Below the 'Zip Code' field, a red error message is displayed: 'No data was found for the requested postcode. No data was found for the requested postcode.' A 'Save' button is located at the bottom of the form. In the top right corner, a red error message box is visible: 'Sorry, we found issues with some of the submitted data - please review and try again'.



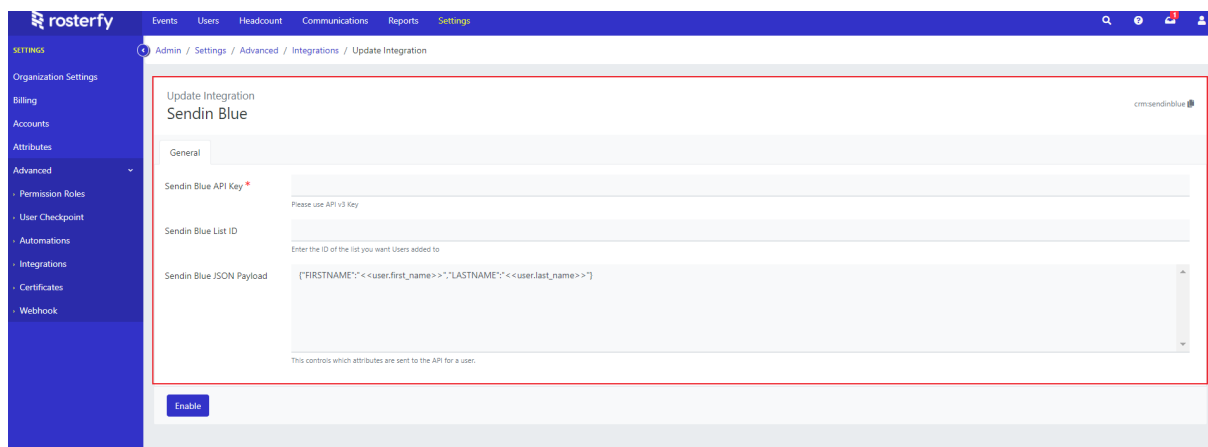
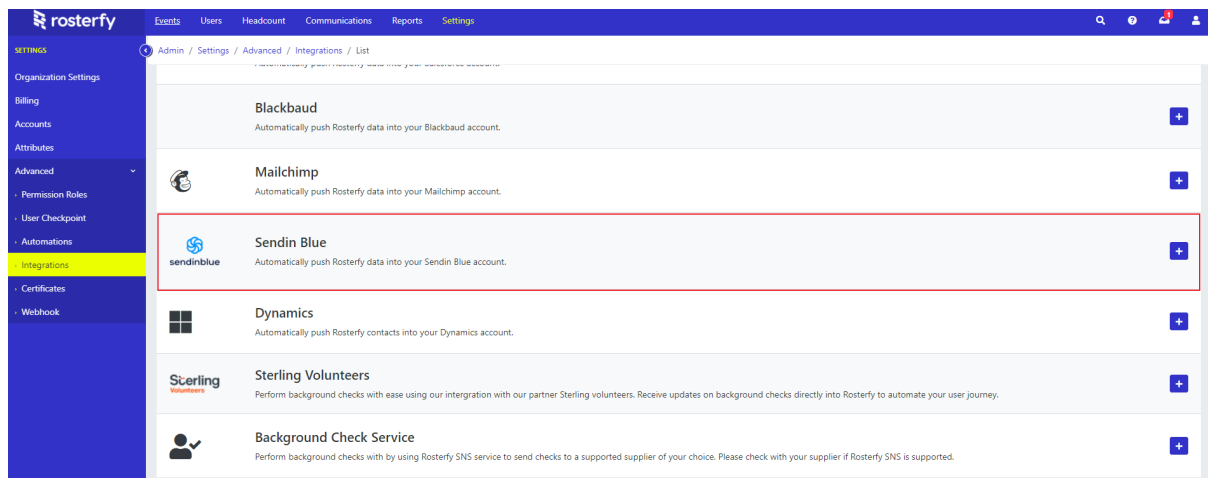
The screenshot shows the 'Update User' form in the Rosterfy Admin Portal. The form is titled 'Address' and contains several fields: 'Lookup Address' (London EC3N 4AB, UK), 'Street Address' (Tower of London), 'City/Town' (empty), 'Zip Code' (EC3N 4AB), 'Country' (United Kingdom), and 'State' (England). A red box highlights the 'Zip Code' field, which contains the text 'EC3N 4AB'. A 'Save' button is located at the bottom of the form. In the top right corner, a green success message box is visible: 'Your changes have been saved'.

## Communications

### Integration to SendinBlue Available

Admins are now able to set up an integration with SendinBlue, a digital marketing and communications tool. User data from Rosterfy can be integrated to be sent to SendinBlue, as per the setup below.

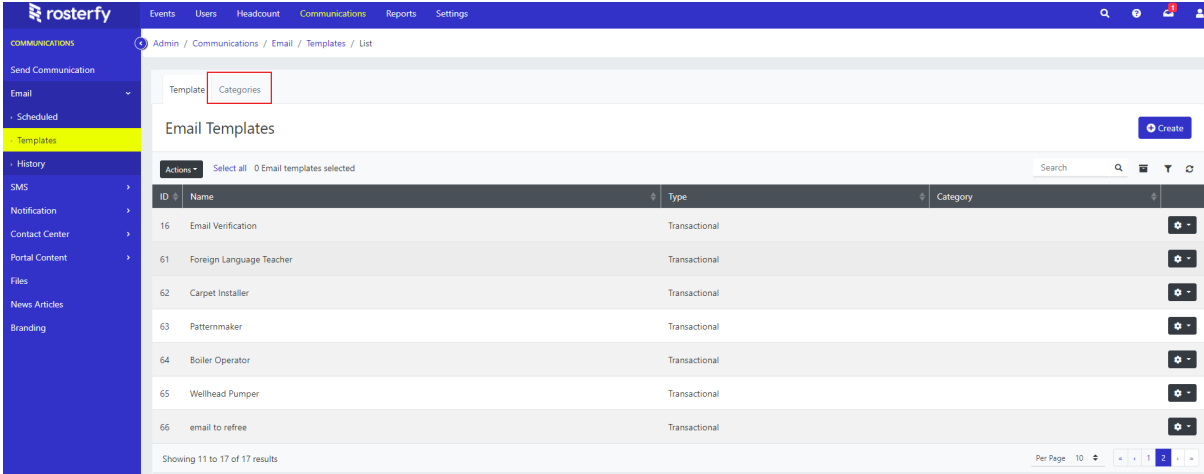
We recommend chatting to your Rosterfy CS Manager prior to setting this up, for assistance.



## Email Template Categories Introduced

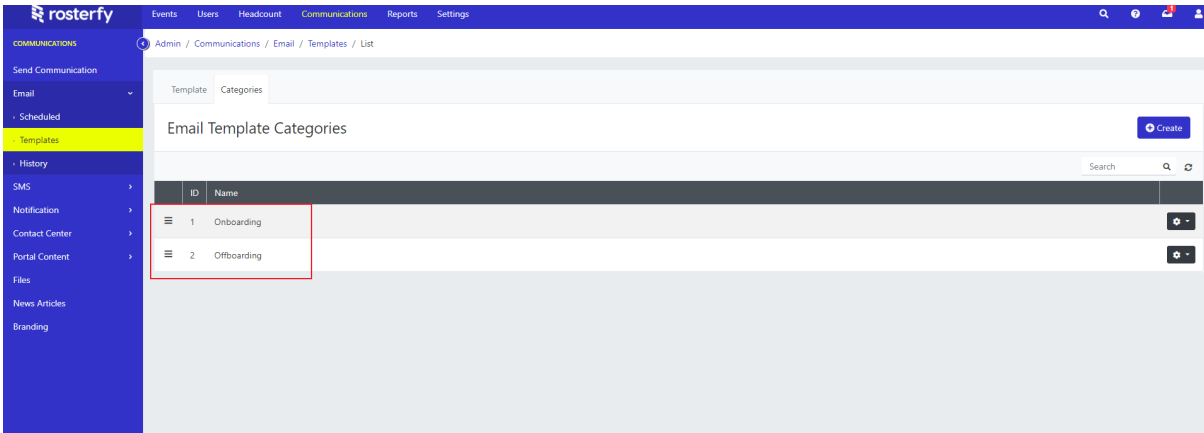
Admins are now able to set up 'Email Template Categories'. This is an easier way to group and categorise your different email templates, if you have a large number of them.

Then in various sections around the platform where you need to select an email template (like when setting up an email automation action, for example, as per the screenshot below), you will be able to filter by the email template category more easily.



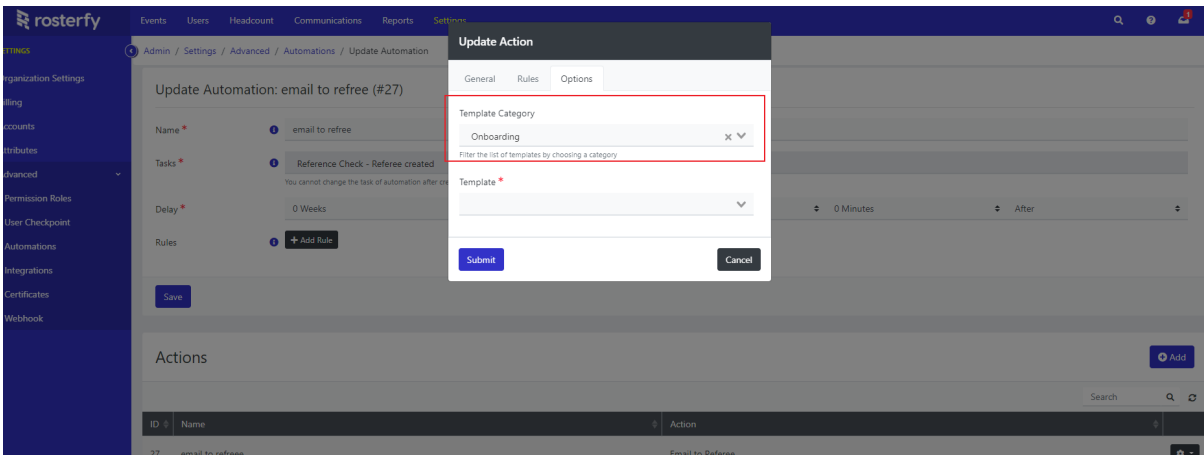
The screenshot shows the 'Email Templates' page in the Rosterfy Admin interface. The 'Categories' tab is selected, and a table lists various email templates. A red box highlights the 'Categories' tab.

ID	Name	Type	Category
16	Email Verification	Transactional	
61	Foreign Language Teacher	Transactional	
62	Carpet Installer	Transactional	
63	Patternmaker	Transactional	
64	Boiler Operator	Transactional	
65	Wellhead Pumper	Transactional	
66	email to referee	Transactional	



The screenshot shows the 'Email Template Categories' page in the Rosterfy Admin interface. The 'Categories' tab is selected, and a table lists two categories. A red box highlights the 'Categories' tab.

ID	Name
1	Onboarding
2	Offboarding



The screenshot shows the 'Update Action' dialog in the Rosterfy Admin interface. The 'Template Category' dropdown is set to 'Onboarding'. A red box highlights the 'Template Category' dropdown.

Update Action

General Rules Options

Template Category: Onboarding

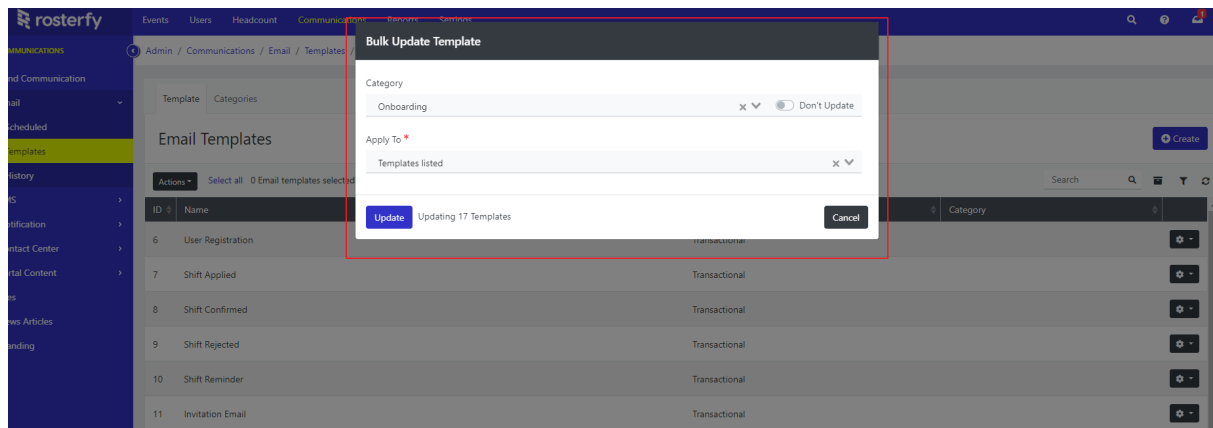
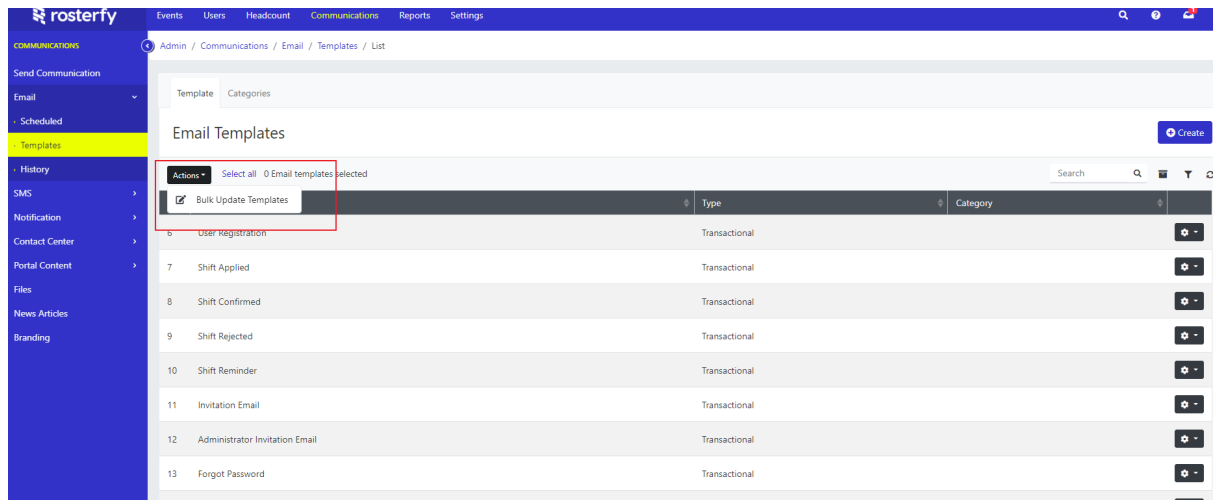
Filter the list of templates by choosing a category

Template \*

Submit Cancel

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Note that this can also be updated in bulk, as per screenshots below, to the listed or selected (clicked-on) email templates.

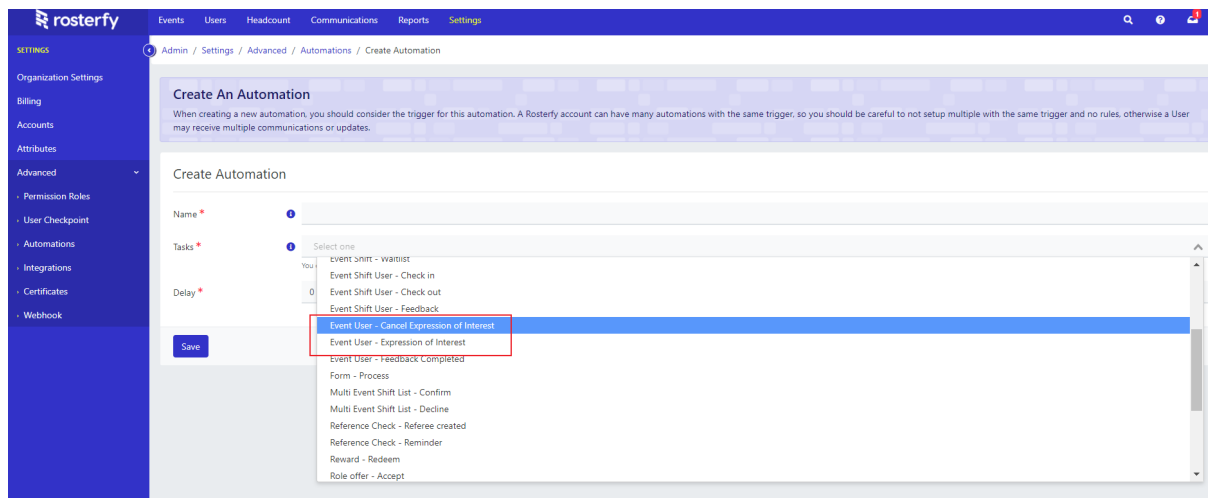
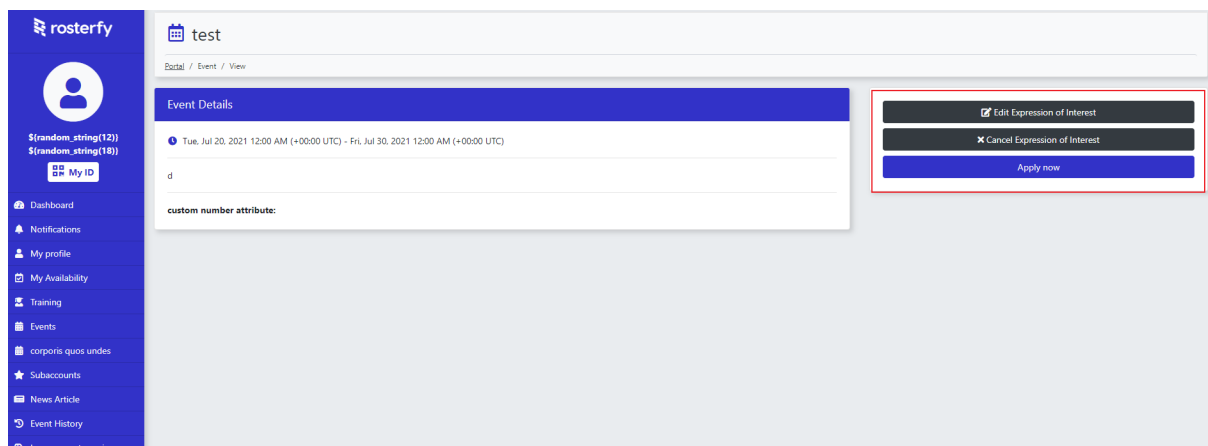


## Candidate Portal

### Cancel Expression of Interest Button

If this feature has been turned on for an Event (in Event > Settings), after Candidates submit an Expression of Interest (form), the options to Edit or Cancel their Expression of interest form will appear.

Cancel Expression of Interest (as well as previously the submitting of an Expression of Interest) is now also an automation trigger, so Admins are able to set up automated emails or other actions, based off this trigger.

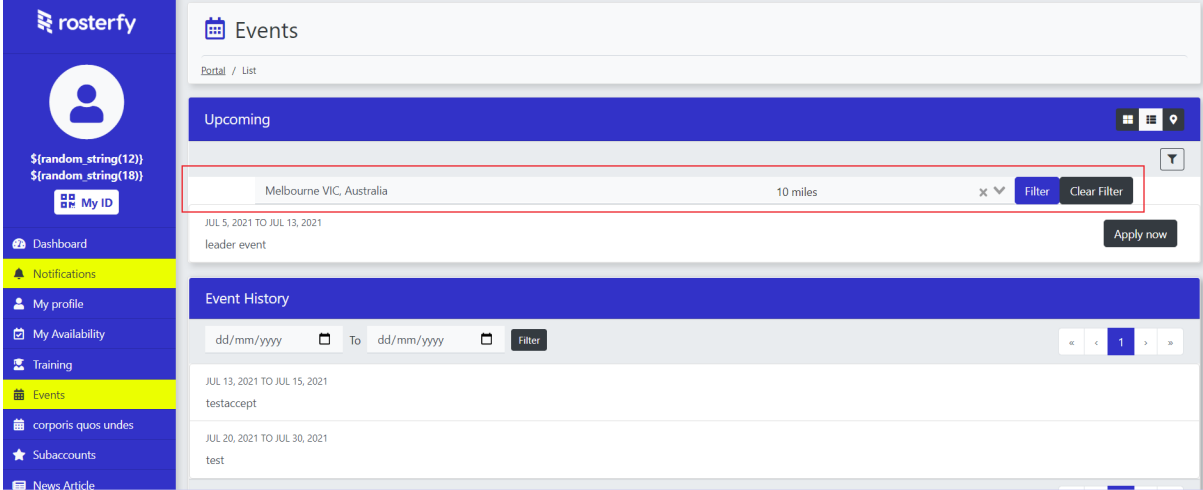


## Events and Shifts

### Events Near Me Functionality for Candidates

We have introduced a simple 'Events Near Me' functionality for Candidates in the Candidate Portal, which allows you to search for an address, location, postcode, etc., and filter for Events within a certain geographical radius of it. Virtual events will not appear on this filter.

Note - to set this up, our customers will need Admins to set up their own Google Maps API, and insert it into their Account Settings under Advanced. We recommend chatting with your CS Manager if you'd like to set this up.



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Events

Portal / List

Upcoming

Melbourne VIC, Australia 10 miles Filter Clear Filter

JUL 5, 2021 TO JUL 13, 2021  
leader event

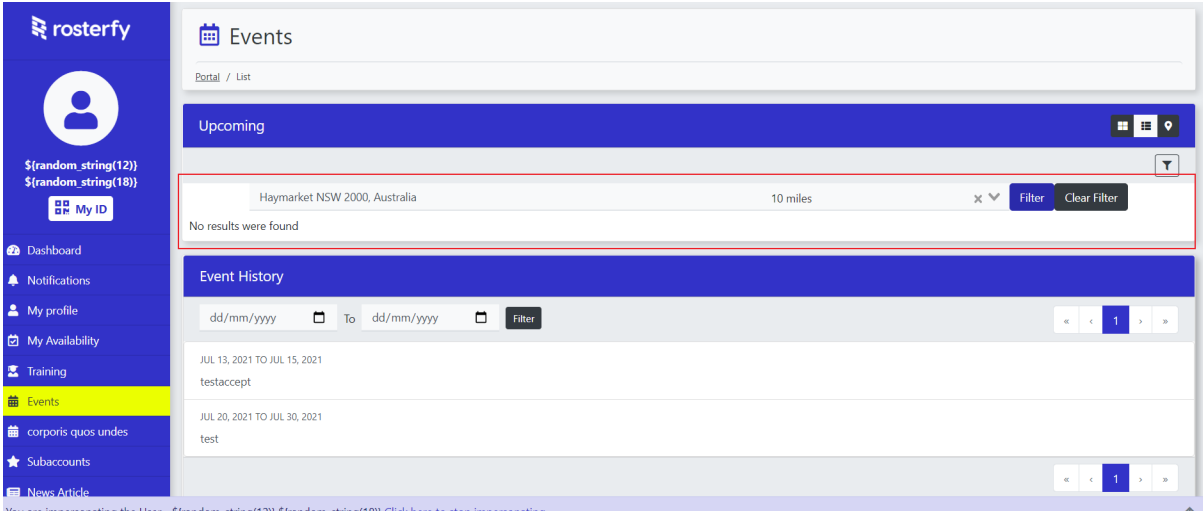
Apply now

Event History

dd/mm/yyyy To dd/mm/yyyy Filter

JUL 13, 2021 TO JUL 15, 2021  
testaccept

JUL 20, 2021 TO JUL 30, 2021  
test



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Events

Portal / List

Upcoming

Haymarket NSW 2000, Australia 10 miles Filter Clear Filter

No results were found

Event History

dd/mm/yyyy To dd/mm/yyyy Filter

JUL 13, 2021 TO JUL 15, 2021  
testaccept

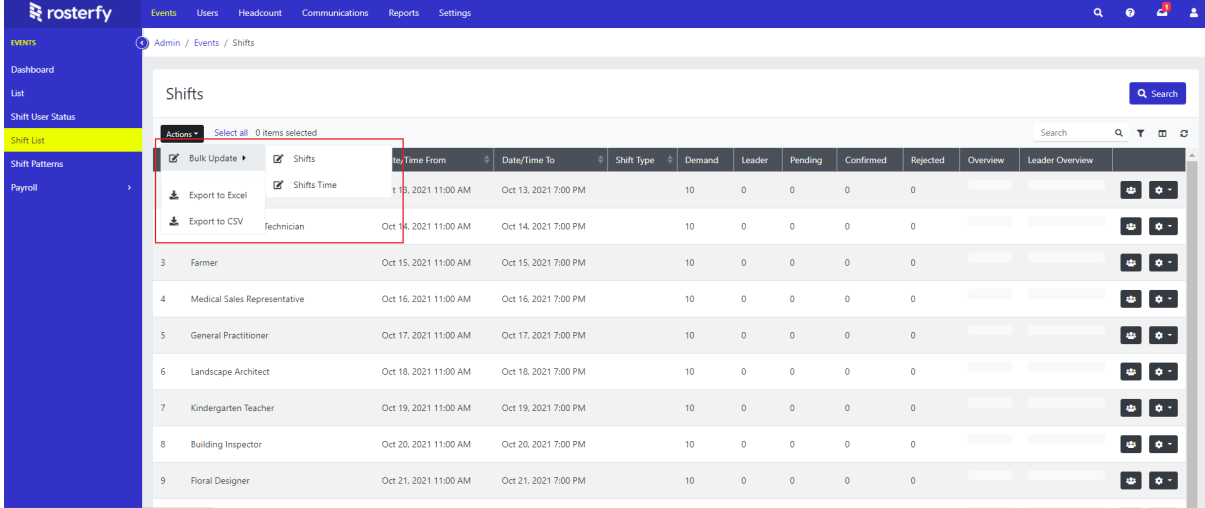
JUL 20, 2021 TO JUL 30, 2021  
test

You are impersonating the User - \$(random\_string(12)).\$(random\_string(18)). Click here to stop impersonating.



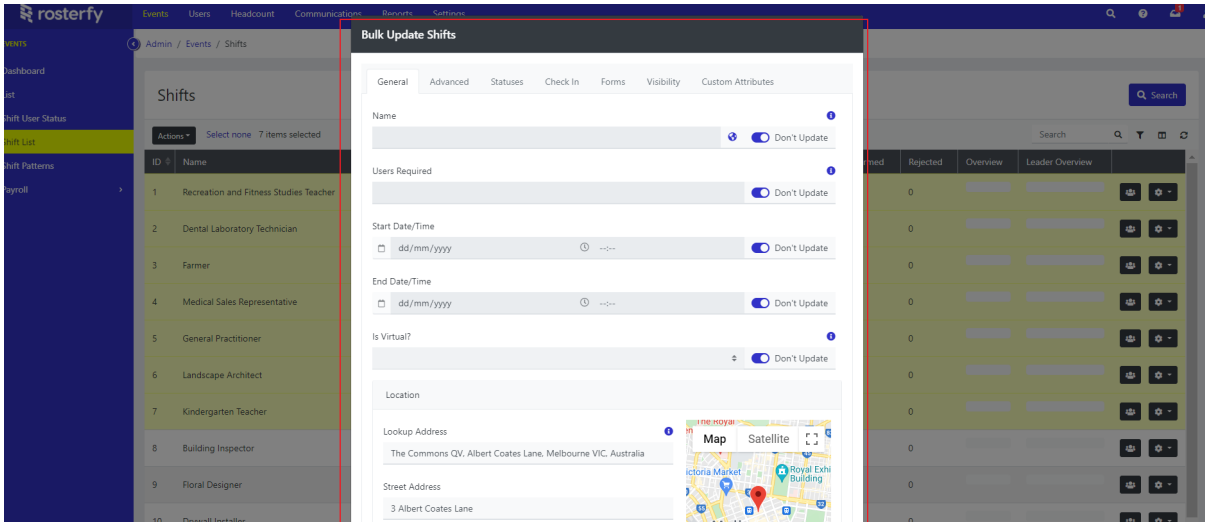
## Bulk Update of Shifts from Shift List

Bulk update of shifts is now available from the shift list (i.e. where all shifts across all events are shown). This will make it easier to update many shifts at once, even if they are across multiple events.



The screenshot shows the Rosterfy interface with the 'Shifts' list. The 'Actions' menu is open, and the 'Bulk Update' option is highlighted. The list contains the following shifts:

ID	Name	Key Time From	Date/Time To	Shift Type	Demand	Leader	Pending	Confirmed	Rejected	Overview	Leader Overview
1	Technician	Oct 13, 2021 11:00 AM	Oct 13, 2021 7:00 PM		10	0	0	0	0		
3	Farmer	Oct 14, 2021 11:00 AM	Oct 14, 2021 7:00 PM		10	0	0	0	0		
4	Medical Sales Representative	Oct 15, 2021 11:00 AM	Oct 15, 2021 7:00 PM		10	0	0	0	0		
5	General Practitioner	Oct 16, 2021 11:00 AM	Oct 16, 2021 7:00 PM		10	0	0	0	0		
6	Landscape Architect	Oct 17, 2021 11:00 AM	Oct 17, 2021 7:00 PM		10	0	0	0	0		
7	Kindergarten Teacher	Oct 18, 2021 11:00 AM	Oct 18, 2021 7:00 PM		10	0	0	0	0		
8	Building Inspector	Oct 19, 2021 11:00 AM	Oct 19, 2021 7:00 PM		10	0	0	0	0		
9	Floral Designer	Oct 20, 2021 11:00 AM	Oct 20, 2021 7:00 PM		10	0	0	0	0		
10	Floral Designer	Oct 21, 2021 11:00 AM	Oct 21, 2021 7:00 PM		10	0	0	0	0		



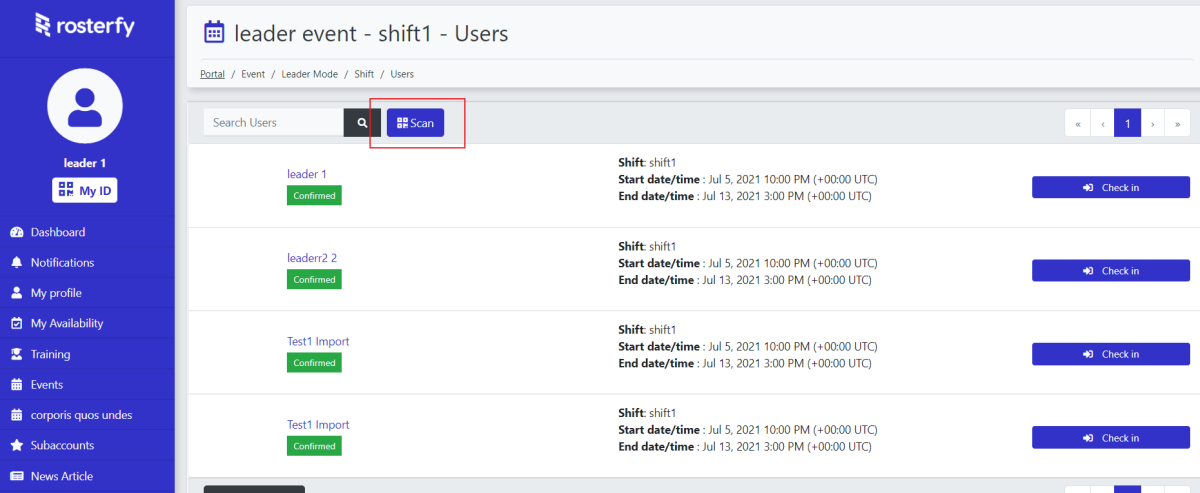
The screenshot shows the 'Bulk Update Shifts' form. The form is open, and the 'Bulk Update Shifts' title is highlighted. The form contains the following fields:

- Name: [Text Field] Don't Update
- Users Required: [Text Field] Don't Update
- Start Date/Time: [Date/Time Picker] Don't Update
- End Date/Time: [Date/Time Picker] Don't Update
- Is Virtual?: [Toggle] Don't Update
- Location: [Text Field]
- Lookup Address: [Text Field] The Commons QV, Albert Coates Lane, Melbourne VIC, Australia
- Street Address: [Text Field] 3 Albert Coates Lane

## QR Code Scanner for Shift Check-In

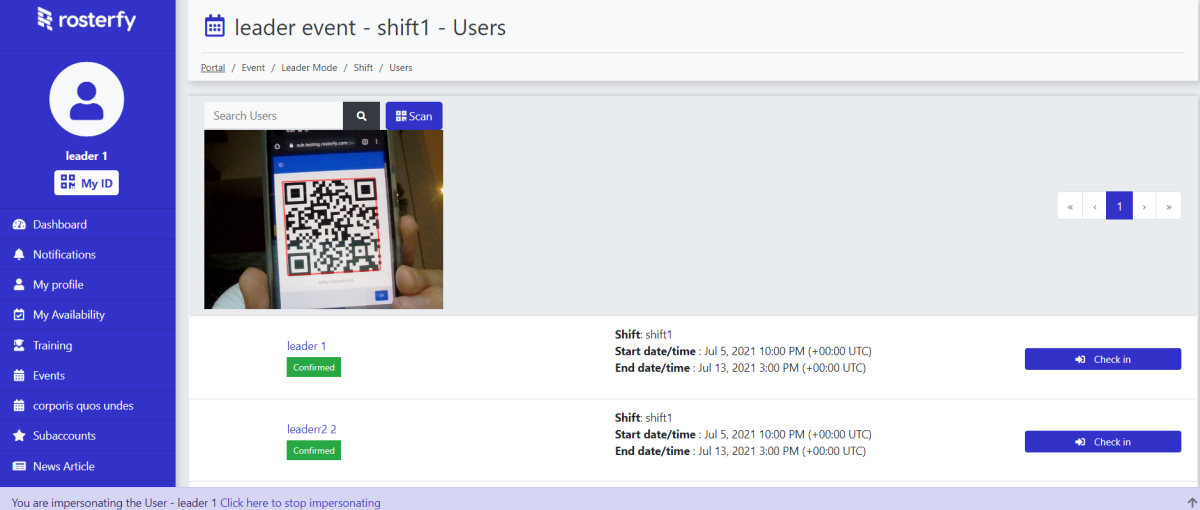
Shift Leaders are now able to use a QR code scan functionality, where Candidates/Volunteers can show their profile. Note that this is a quick way to search for a Candidate (rather than typing in their name), however it will not check them into the shift - this still needs to be done manually (there may be multiple shifts on the list).

This is the QR code that Candidates can access on their Candidate Portal, beneath their photo (titled 'My ID').



The screenshot shows the Rosterfy interface for a shift leader. The left sidebar contains navigation links: Dashboard, Notifications, My profile, My Availability, Training, Events, corporis quos undes, Subaccounts, and News Article. The main content area is titled 'leader event - shift1 - Users' and includes a search bar and a 'Scan' button. Below the search bar, there is a table of users with columns for user name, status, shift, start/end times, and a 'Check in' button.

User	Status	Shift	Start date/time	End date/time	Action
leader 1	Confirmed	Shift: shift1	Jul 5, 2021 10:00 PM (+00:00 UTC)	Jul 13, 2021 3:00 PM (+00:00 UTC)	Check in
leader2 2	Confirmed	Shift: shift1	Jul 5, 2021 10:00 PM (+00:00 UTC)	Jul 13, 2021 3:00 PM (+00:00 UTC)	Check in
Test1 Import	Confirmed	Shift: shift1	Jul 5, 2021 10:00 PM (+00:00 UTC)	Jul 13, 2021 3:00 PM (+00:00 UTC)	Check in
Test1 Import	Confirmed	Shift: shift1	Jul 5, 2021 10:00 PM (+00:00 UTC)	Jul 13, 2021 3:00 PM (+00:00 UTC)	Check in




The screenshot shows the Rosterfy interface for a shift leader, similar to the previous one, but with a QR code scanner overlay. The scanner is positioned over the 'Search Users' field. The table below the scanner shows the same list of users, but only two are visible: 'leader 1' and 'leader2 2'.

User	Status	Shift	Start date/time	End date/time	Action
leader 1	Confirmed	Shift: shift1	Jul 5, 2021 10:00 PM (+00:00 UTC)	Jul 13, 2021 3:00 PM (+00:00 UTC)	Check in
leader2 2	Confirmed	Shift: shift1	Jul 5, 2021 10:00 PM (+00:00 UTC)	Jul 13, 2021 3:00 PM (+00:00 UTC)	Check in

You are impersonating the User - leader 1 Click here to stop impersonating

rosterfy



leader 1

My ID

Dashboard

Notifications

My profile

My Availability

Training

Events

corporis quos undes

Subaccounts

News Article

leader event - shift1 - Users

Portal / Event / Leader Mode / Shift / Users

Search Users

Q

Scan

Test1 Import

Confirmed

Shift: shift1

Start date/time : Jul 5, 2021 10:00 PM (+00:00 UTC)

End date/time : Jul 13, 2021 3:00 PM (+00:00 UTC)

Check in

Test1 Import

Confirmed

Shift: shift1

Start date/time : Jul 5, 2021 10:00 PM (+00:00 UTC)

End date/time : Jul 13, 2021 3:00 PM (+00:00 UTC)

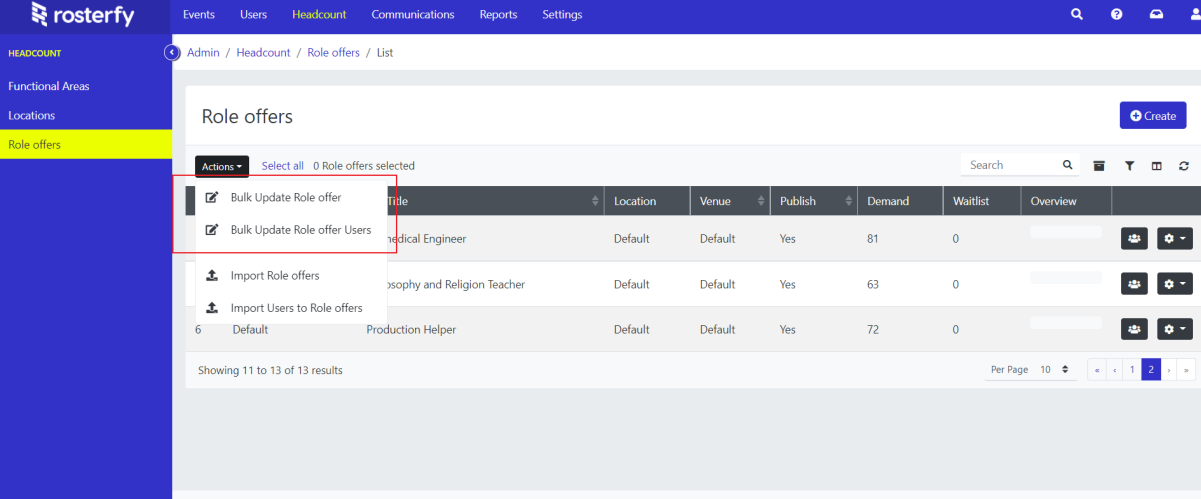
Check in

Back to shift1

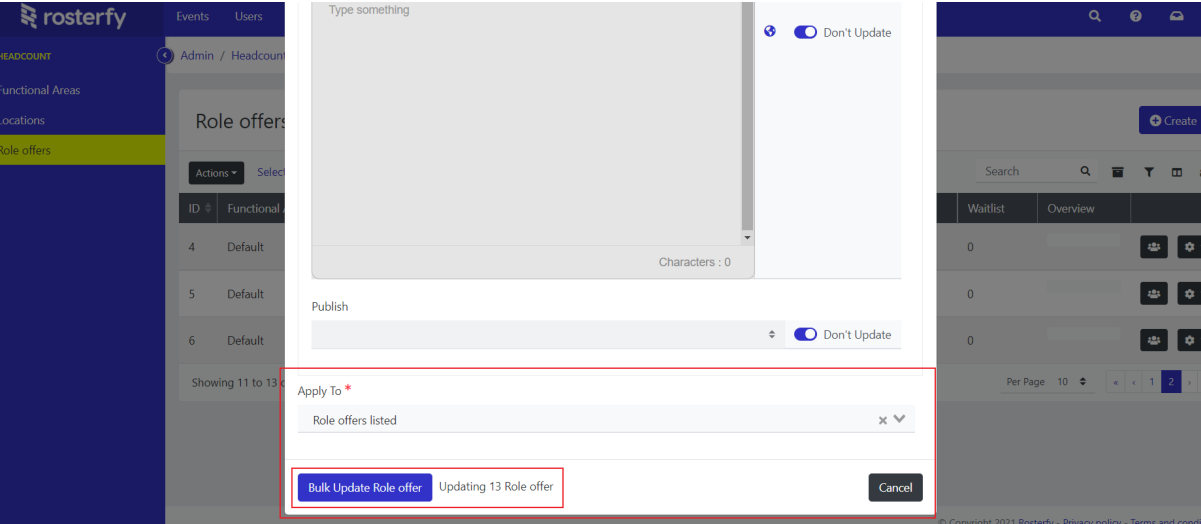
## Headcount

### Bulk Role Offer

Admins are now able to make updates to Role Offers in bulk from the Role Offers list view. This will save time in click-on each individual Role Offer User List, if mass changes are necessary all at once across many separate Role Offers.



Title	Location	Venue	Publish	Demand	Waitlist	Overview
Medical Engineer	Default	Default	Yes	81	0	
Philosophy and Religion Teacher	Default	Default	Yes	63	0	
Production Helper	Default	Default	Yes	72	0	



Apply To \*

Role offers listed

**Bulk Update Role offer** Updating 13 Role offer

Cancel