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Product Release Notes for Rosterfy 2.0

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General

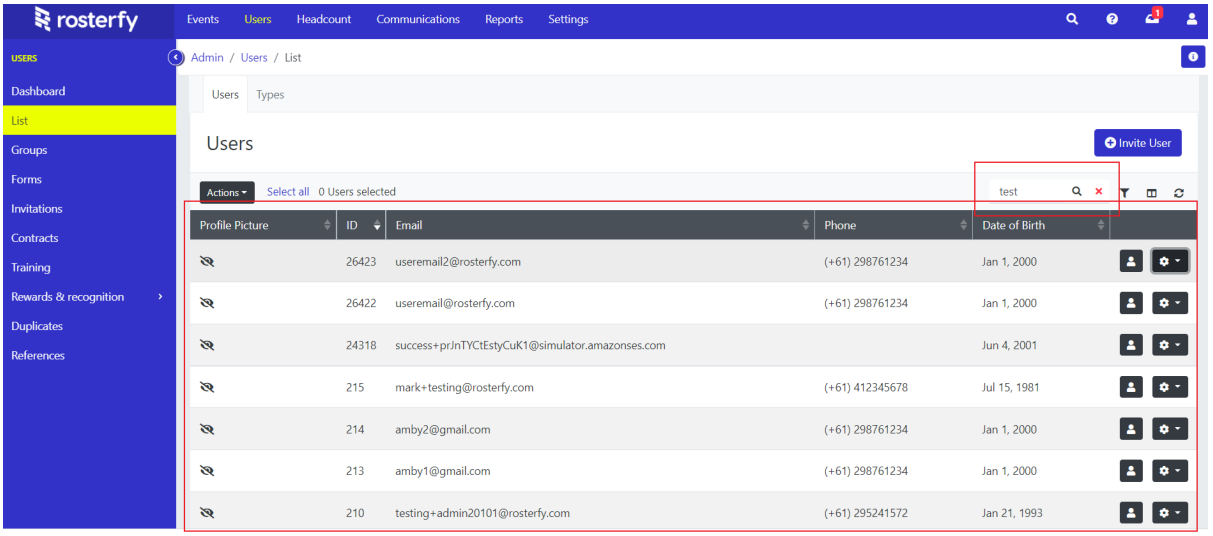
Please note - all employee data you may see is dummy data and not sensitive

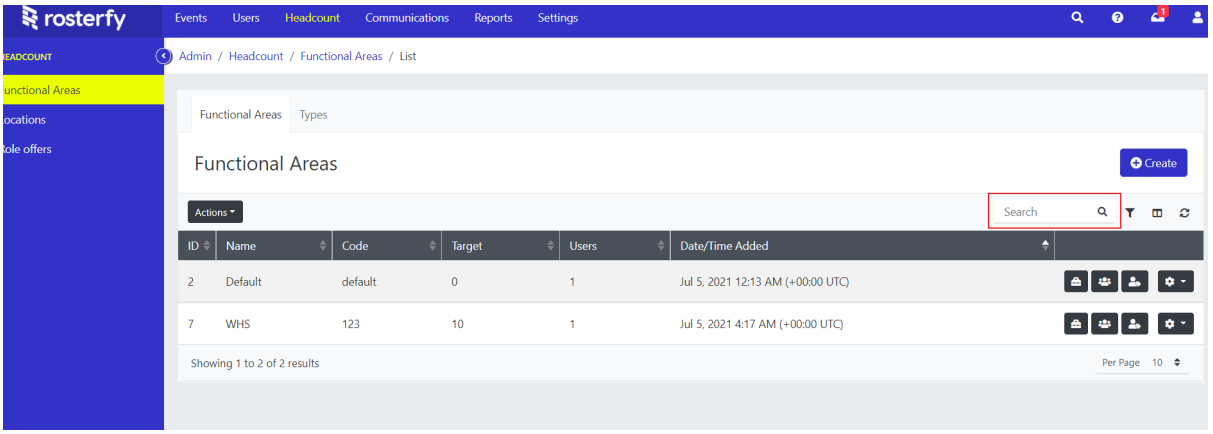
Quick Search Function Added across Platform

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'

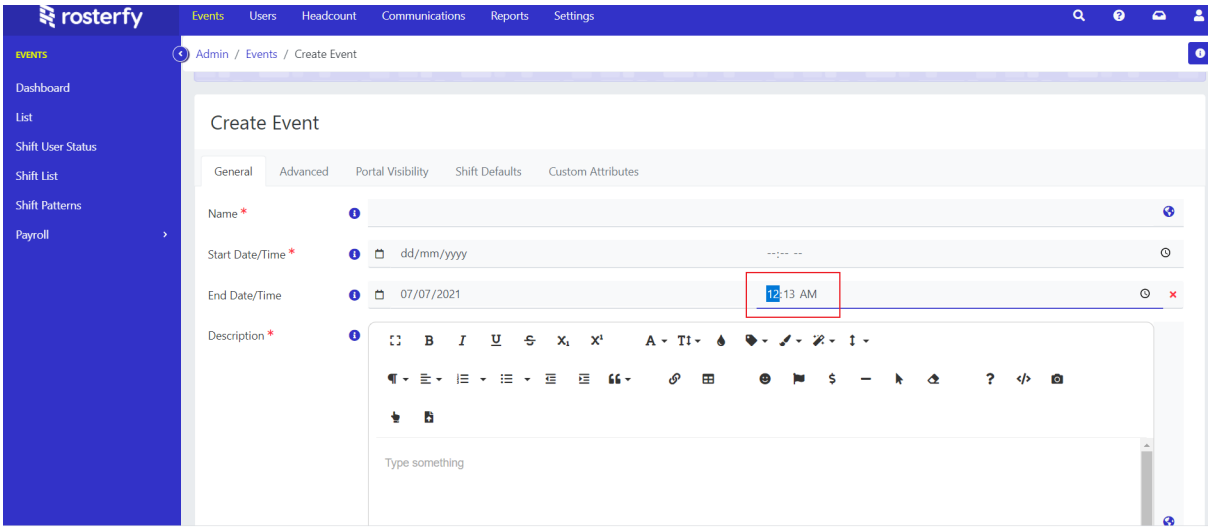
Note - depending on the number of values in the list, the quick search may take some time to process (searching against a list of 30,000 users for example may take a few minutes).





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.



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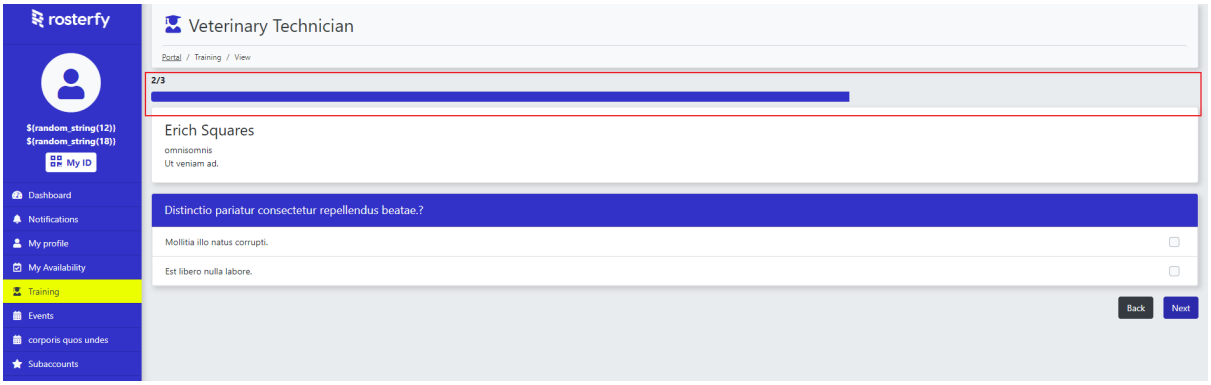
Progress Bar on Multi-Page Forms

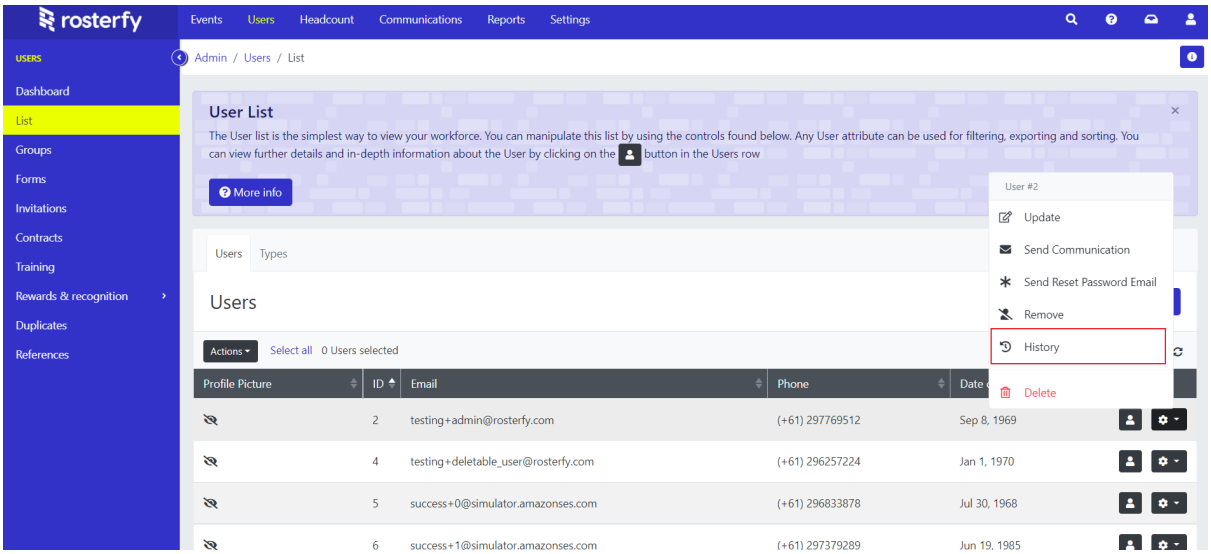
A visual update only, all multi-page forms now for Candidates will show a progress bar at the top of the form, as per the screenshot below. This will be based on pages only, not form fields.

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



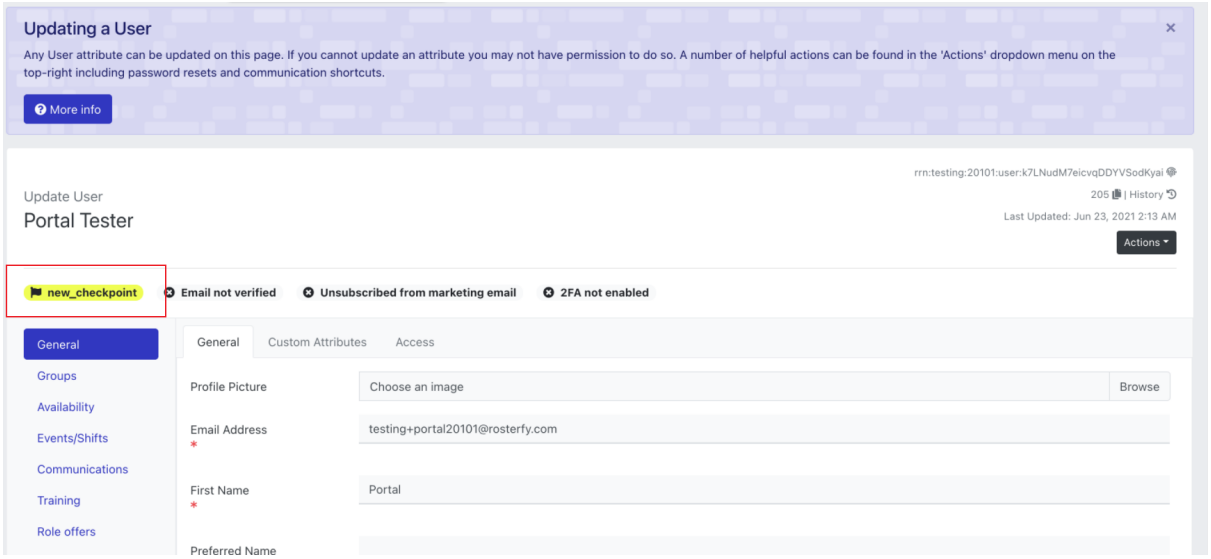
Data Edit History Improved

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.



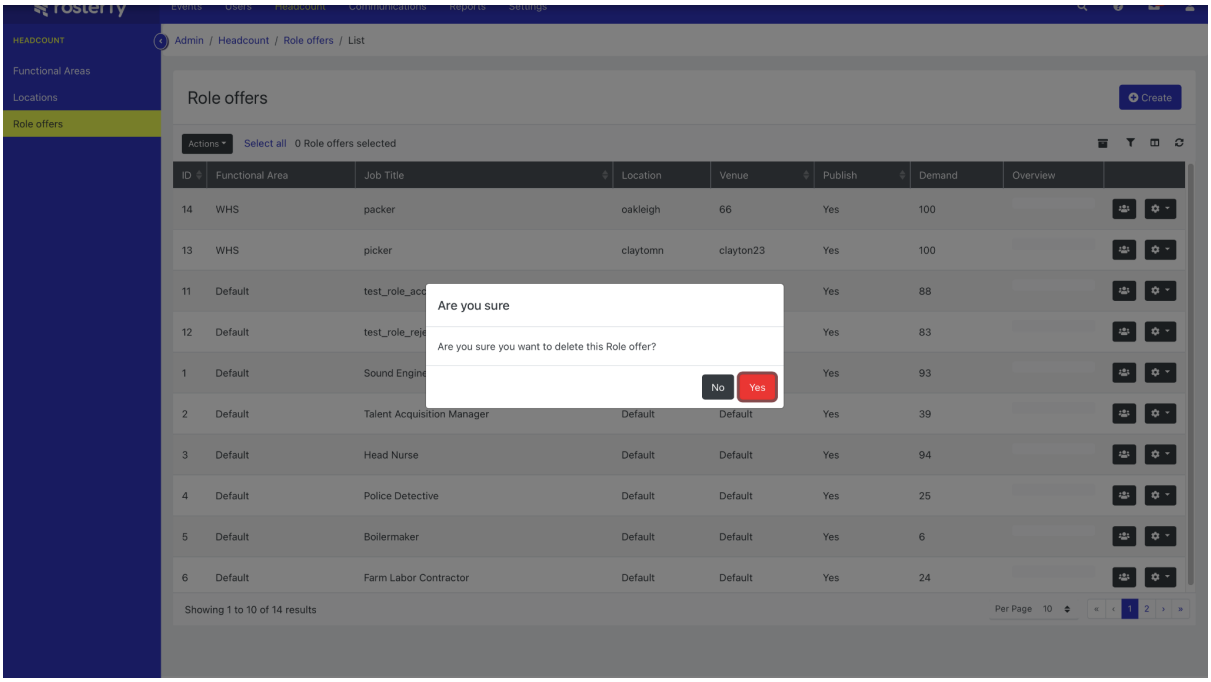
User Checkpoint in Secondary Colour

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.



Popups can be Confirmed by pressing Enter

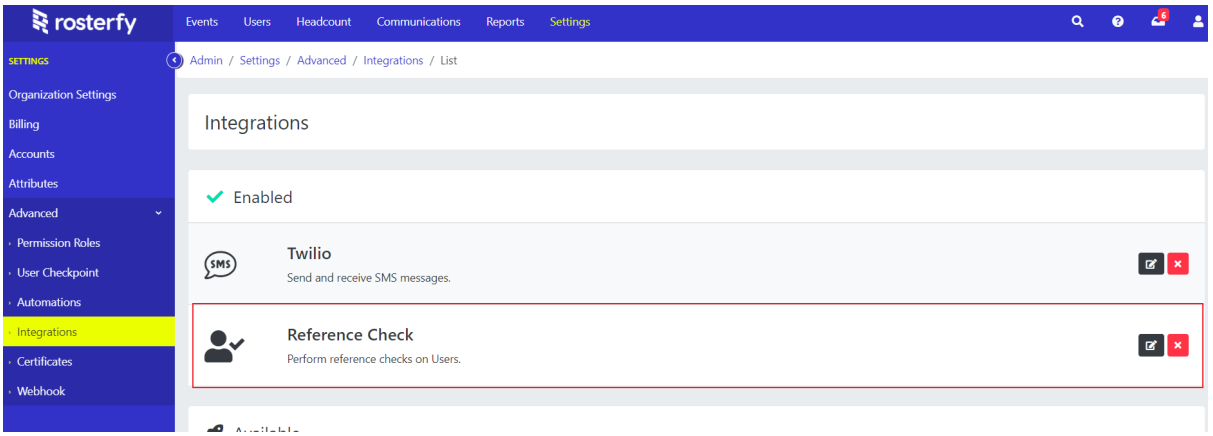
A small UX update, across the Rosterfy platform wherever there are popups (like the Are you sure popup shown below), the Yes button is now auto focused. This means that Admins can press the 'Enter' key to complete these tasks faster.

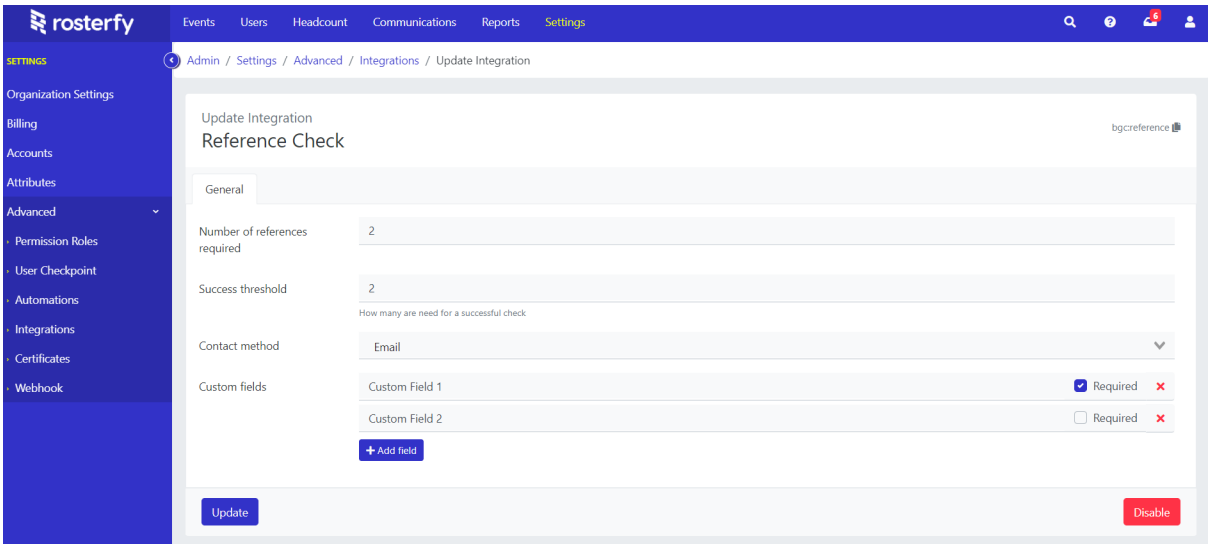


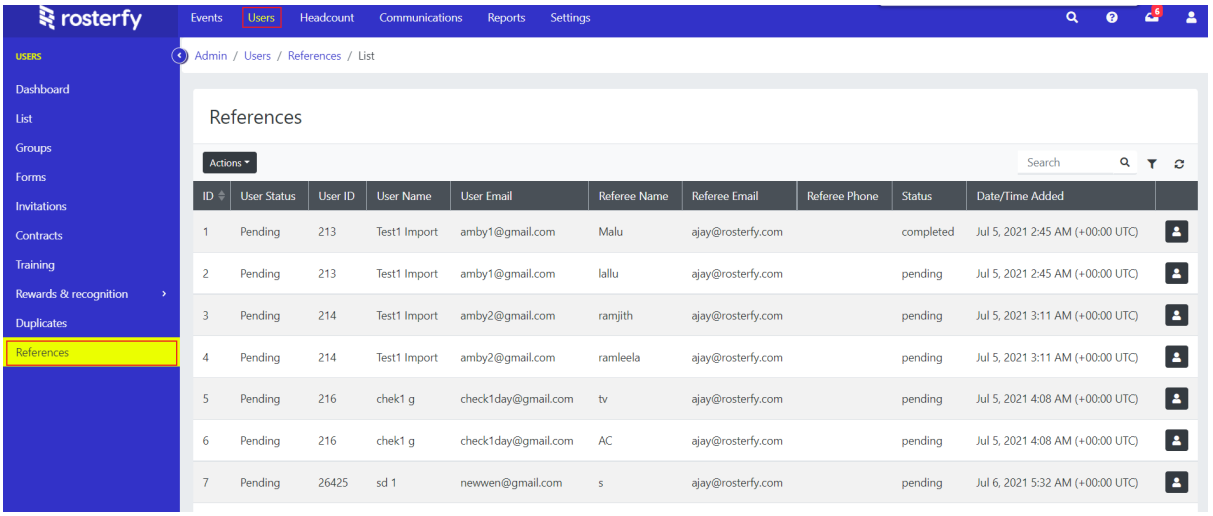
Reference Check Module

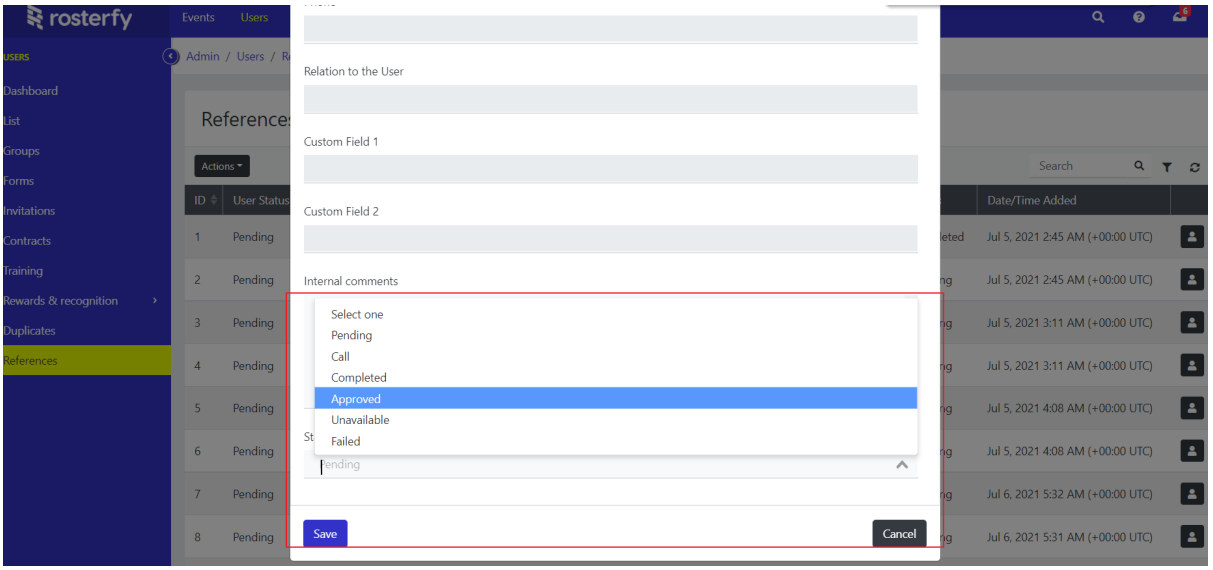
A Reference Check module has been created, where Reference Checks can be managed by Admins. This can be set up in the integrations section of Settings if it is enabled for you. Please chat to your CS Manager if you'd like to use this feature.

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.









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

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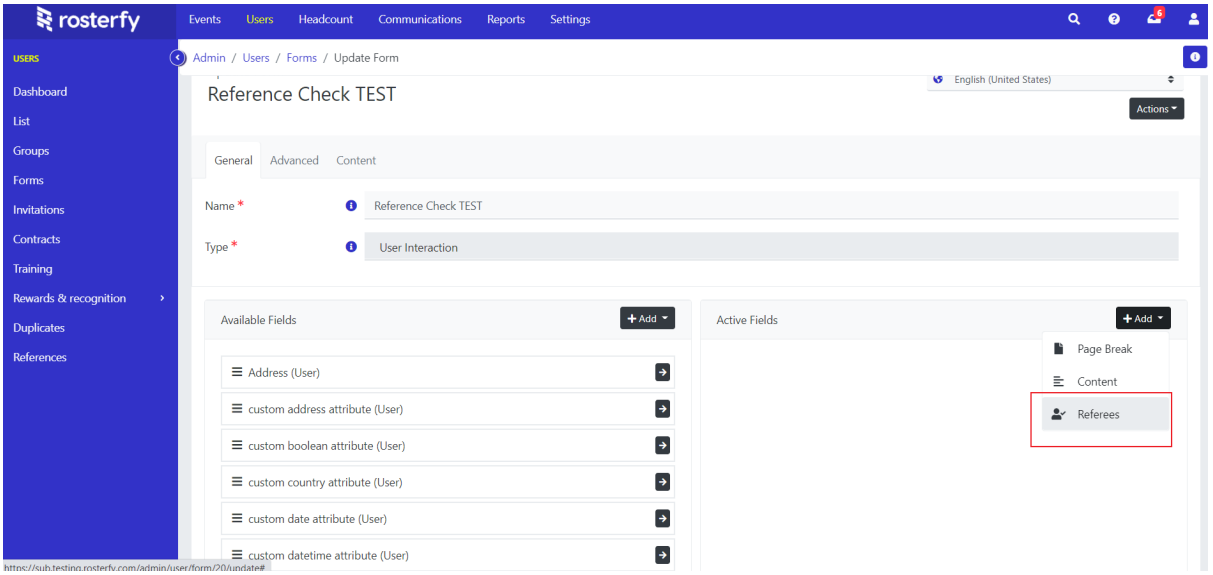
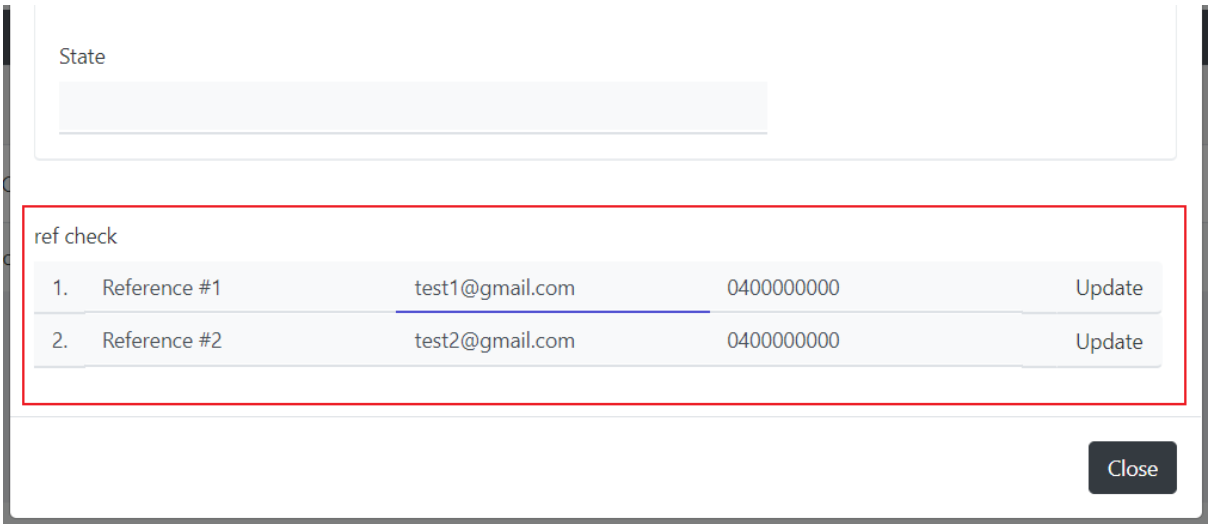
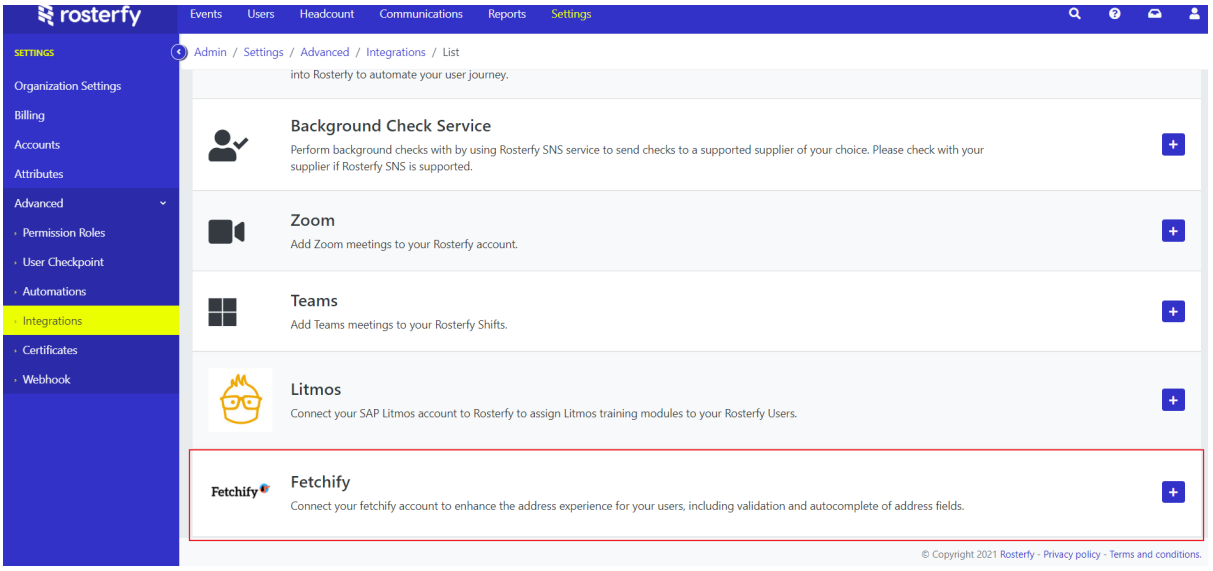
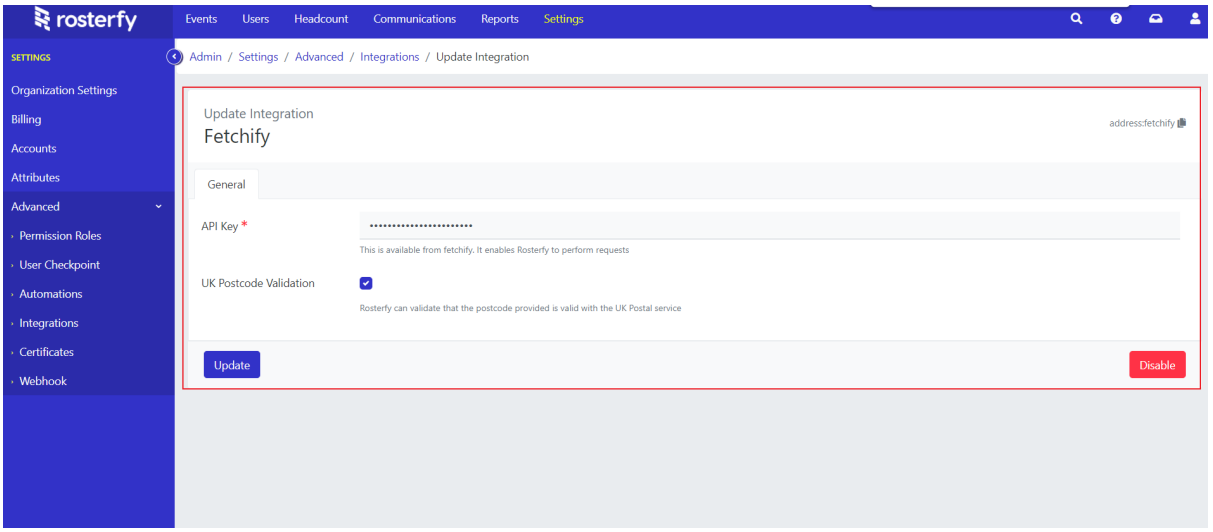

rosterfy
Events
Users
Headcount
Communications
Reports
Settings
USERS
Dashboard
List
Groups
Forms
Invitations
Contracts
Training
Rewards & recognition
Duplicates
References
Admin / Users / Forms / Update Form
Reference Check TEST
English (United States)
Actions
General
Advanced
Content
Name *
Reference Check TEST
Type *
User Interaction
Available Fields
+ Add
Address (User)
custom address attribute (User)
custom boolean attribute (User)
custom country attribute (User)
custom date attribute (User)
custom datetime attribute (User)
Active Fields
+ Add
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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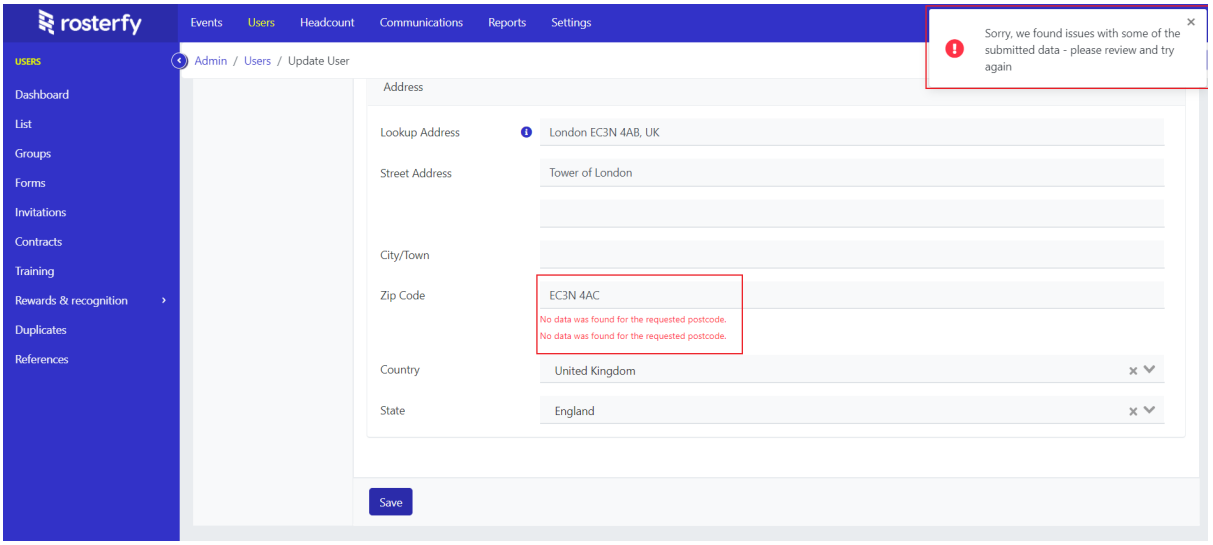
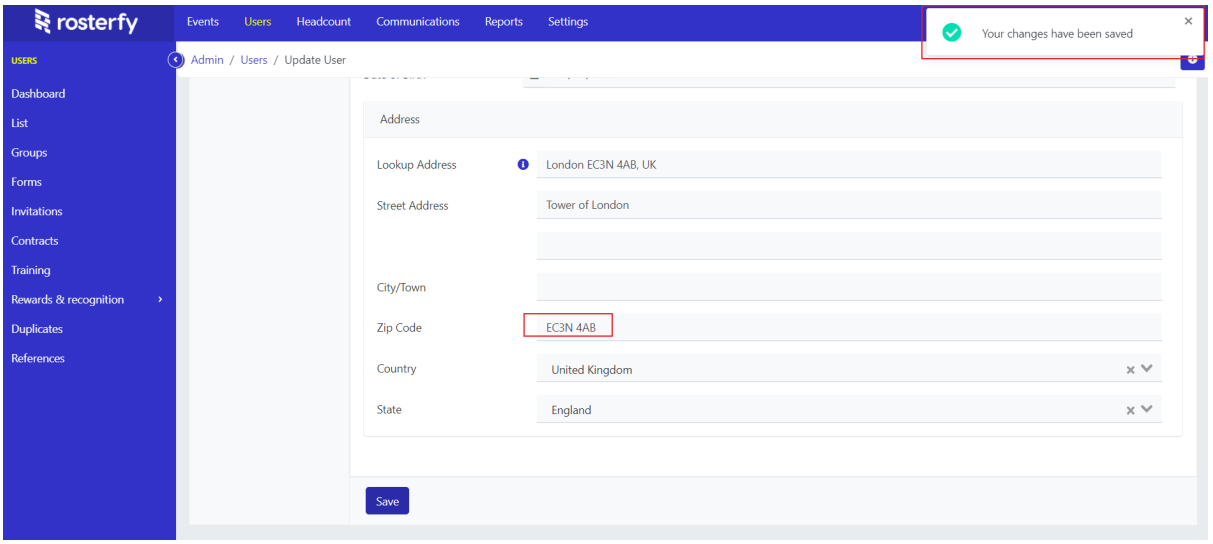
If you try to save an incorrect UK postcode in any form or anywhere on the admin portal (see update user profile below) in the platform, it will fail and deliver an error message. This will pass if the postcode is correct and a real one.





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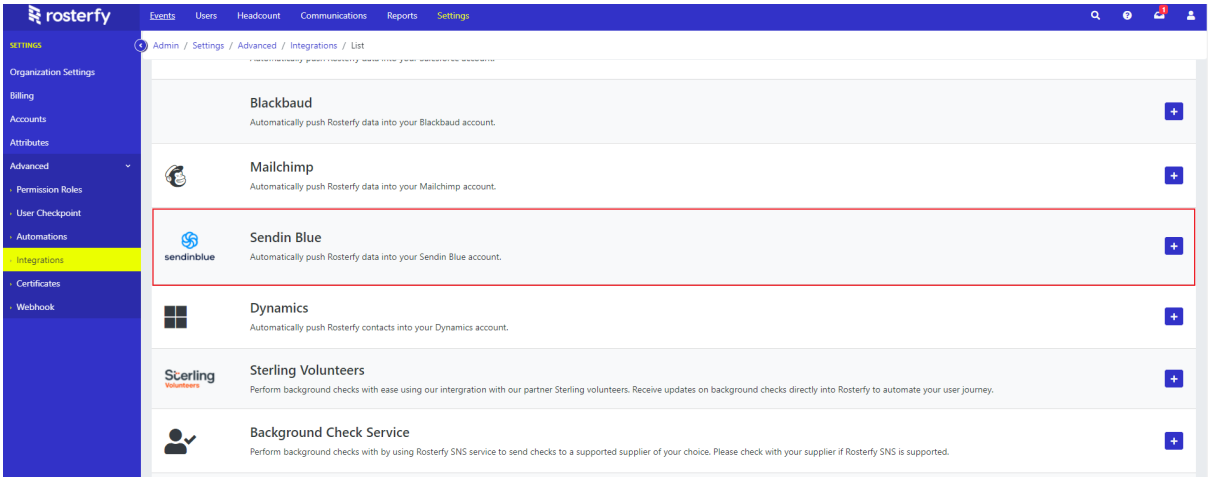
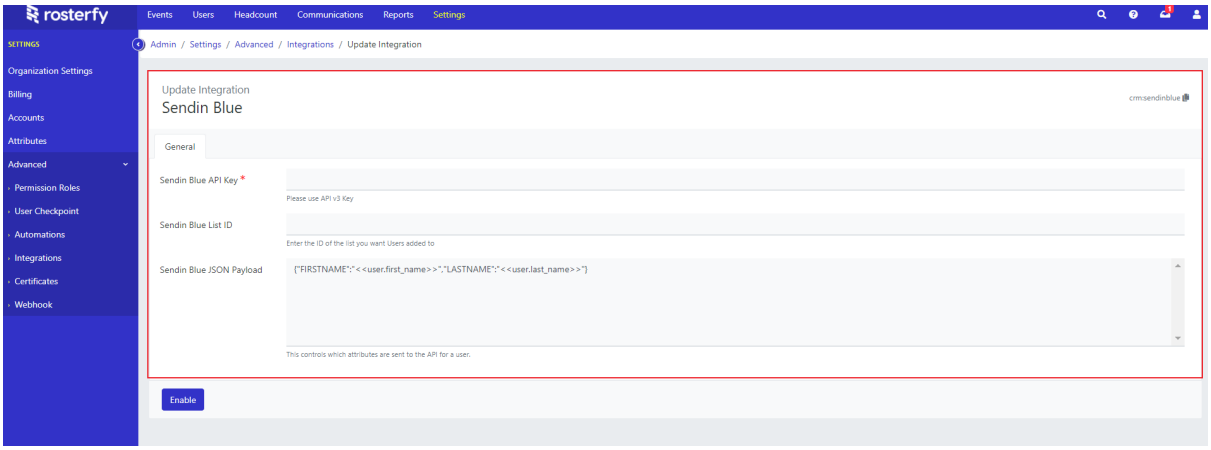
Communications

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.





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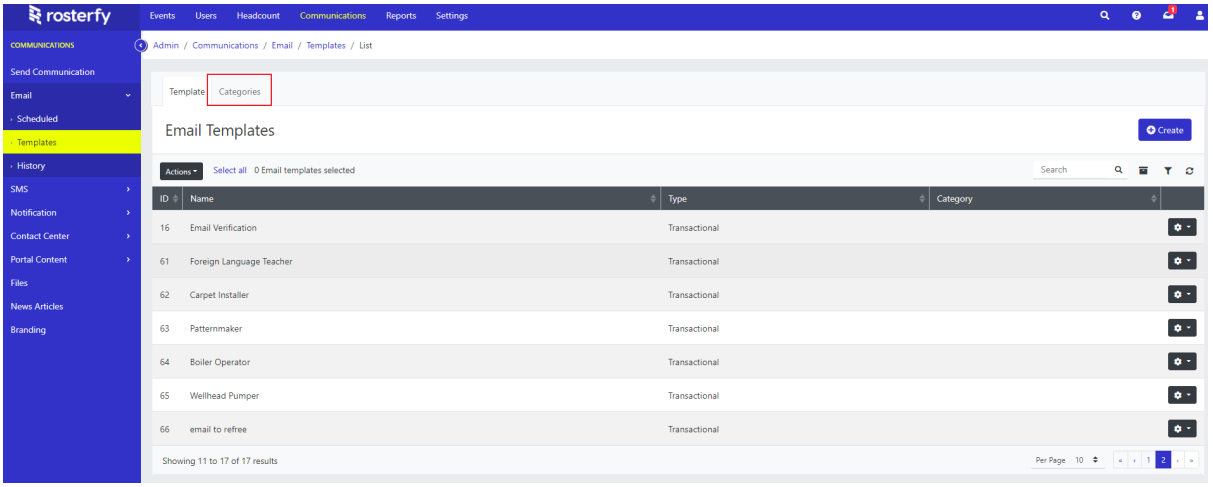
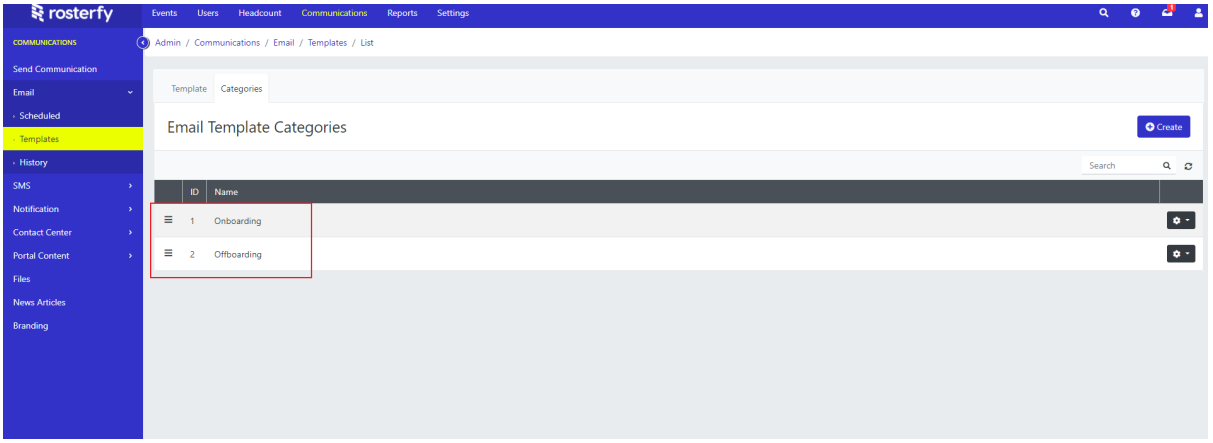
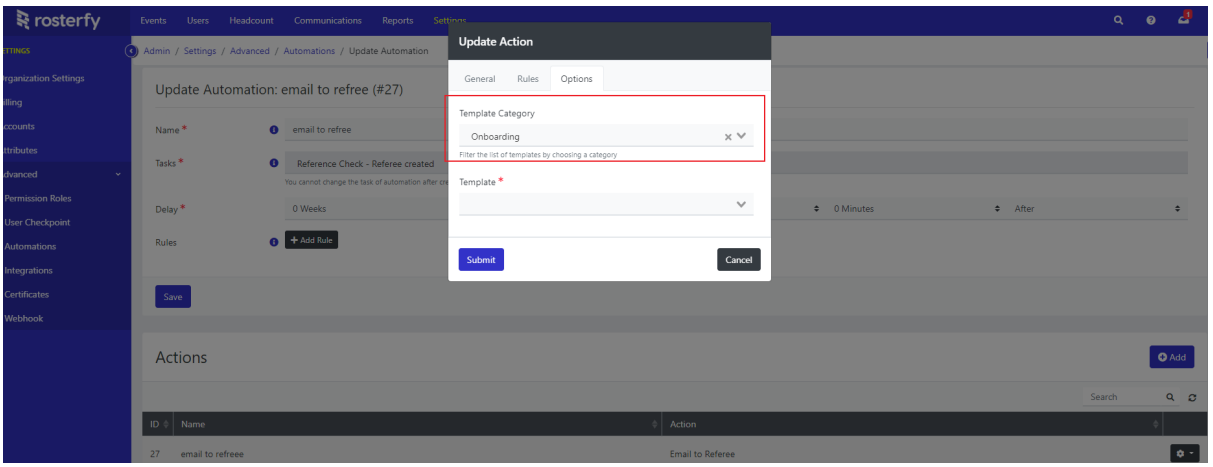
Email Template Categories Introduced

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.

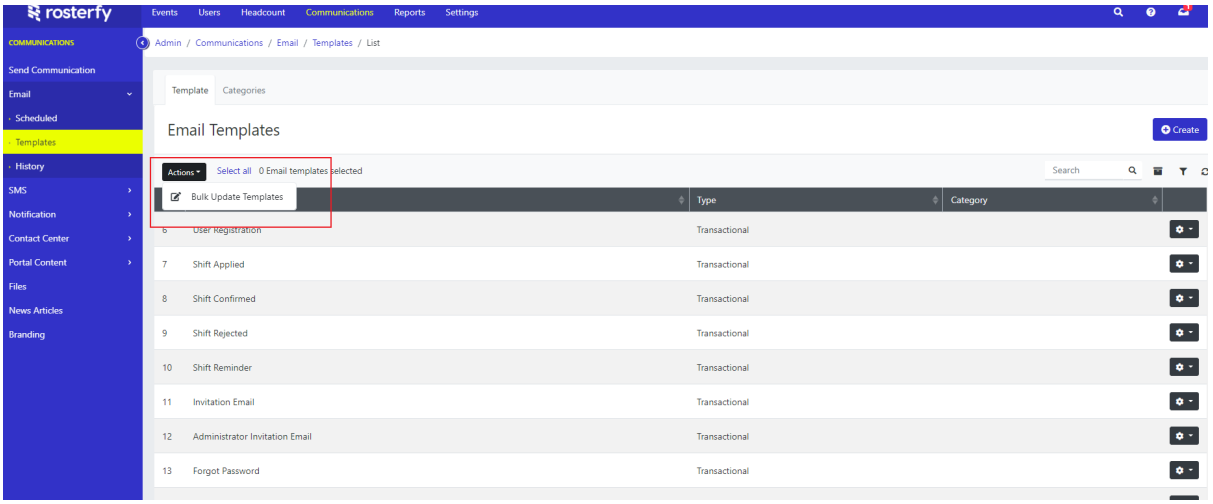
Then in various sections around the platform where you need to select an email template (like when setting up an email automation action, for example, as per the screenshot below), you will be able to filter by the email template categorie more easily.

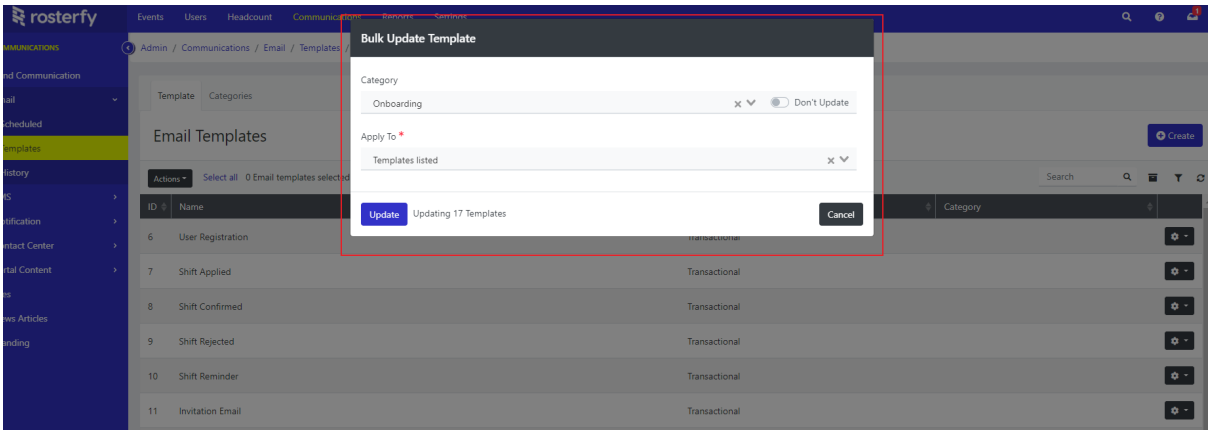






Note that this can also be updated in bulk, as per screenshots below, to the listed or selected (clicked-on) email templates.



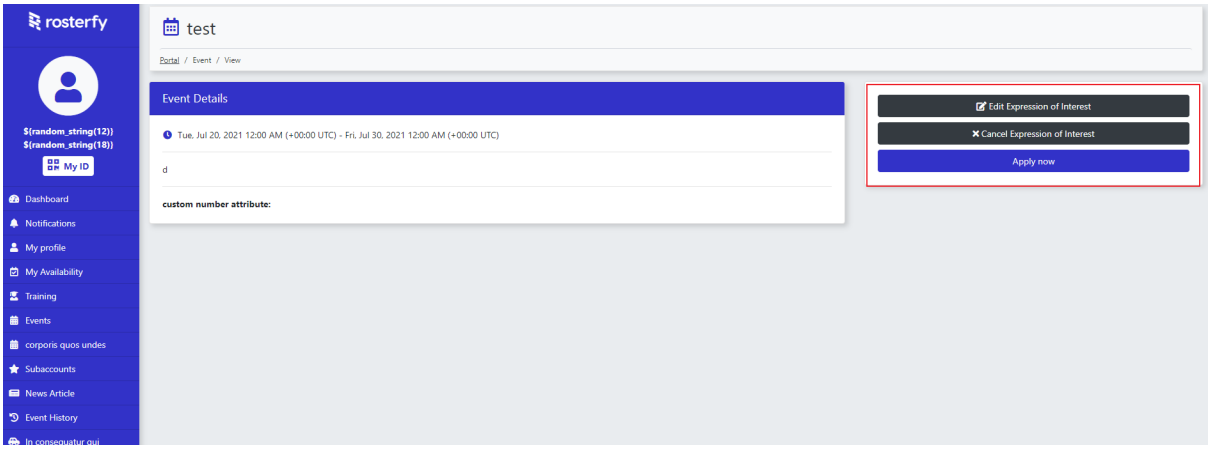


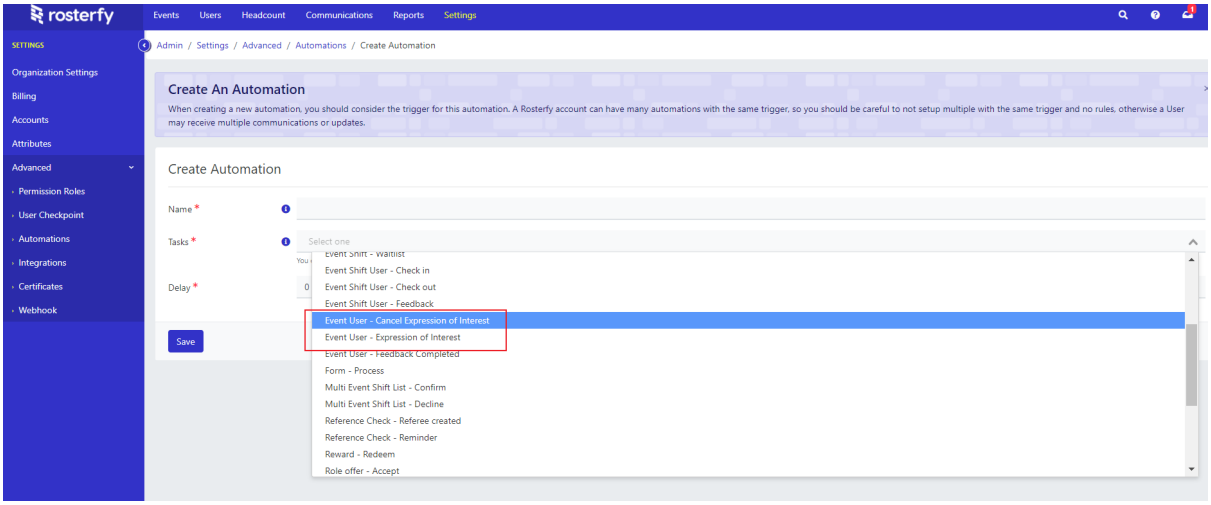
Candidate Portal

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.



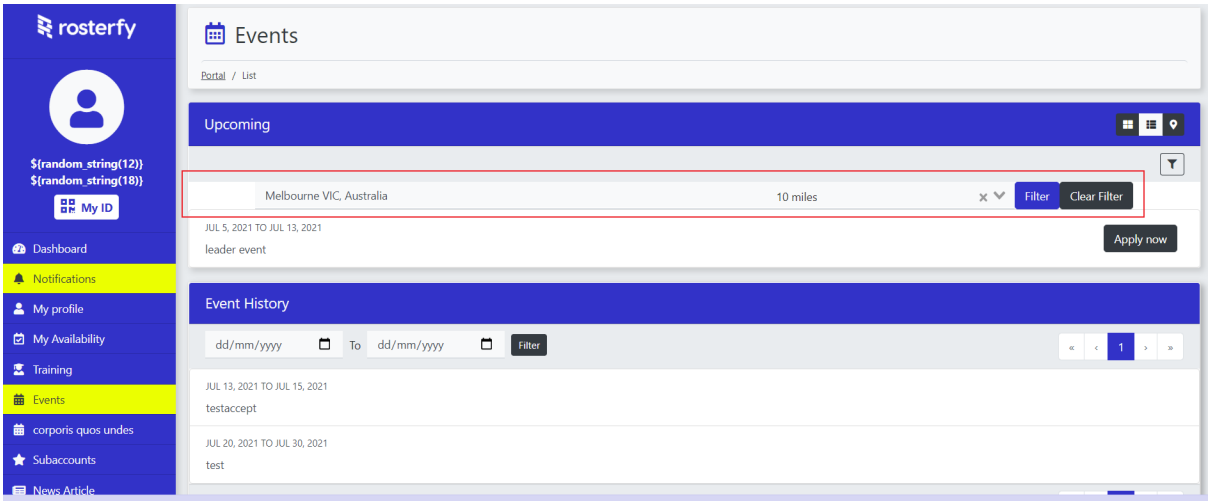


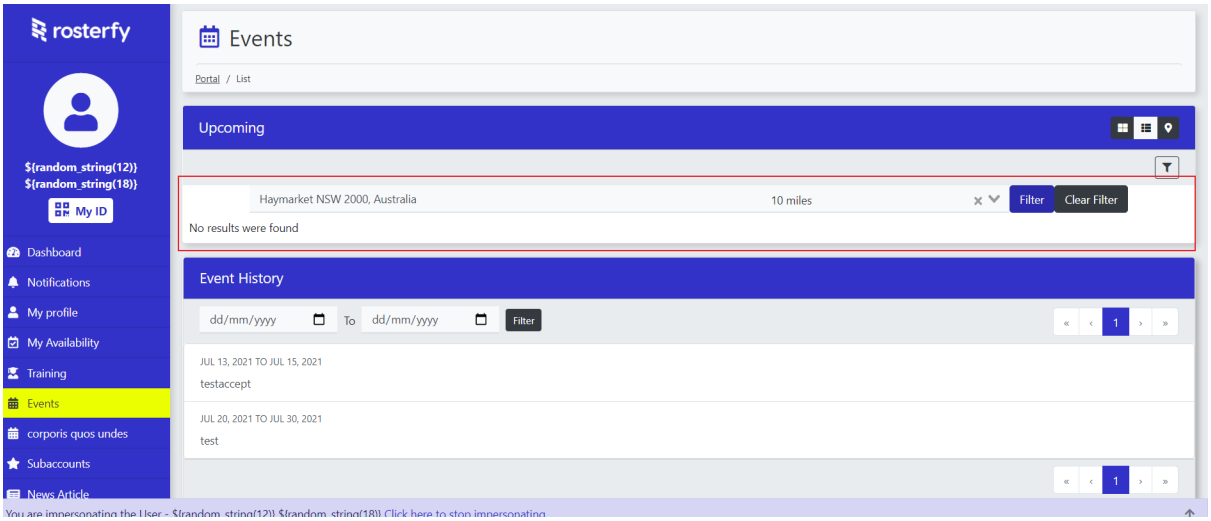
Events and Shifts

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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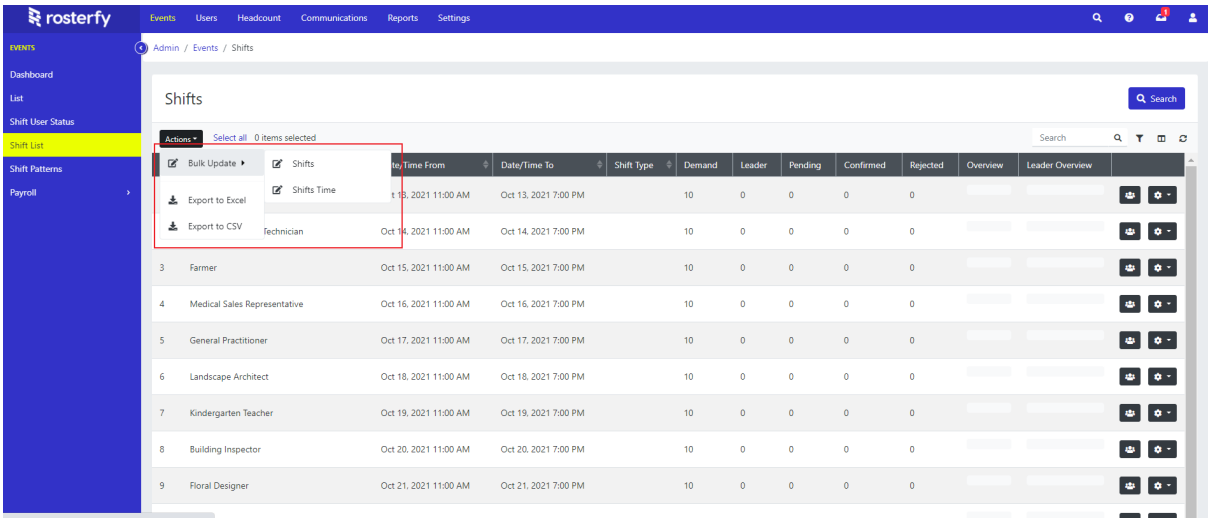
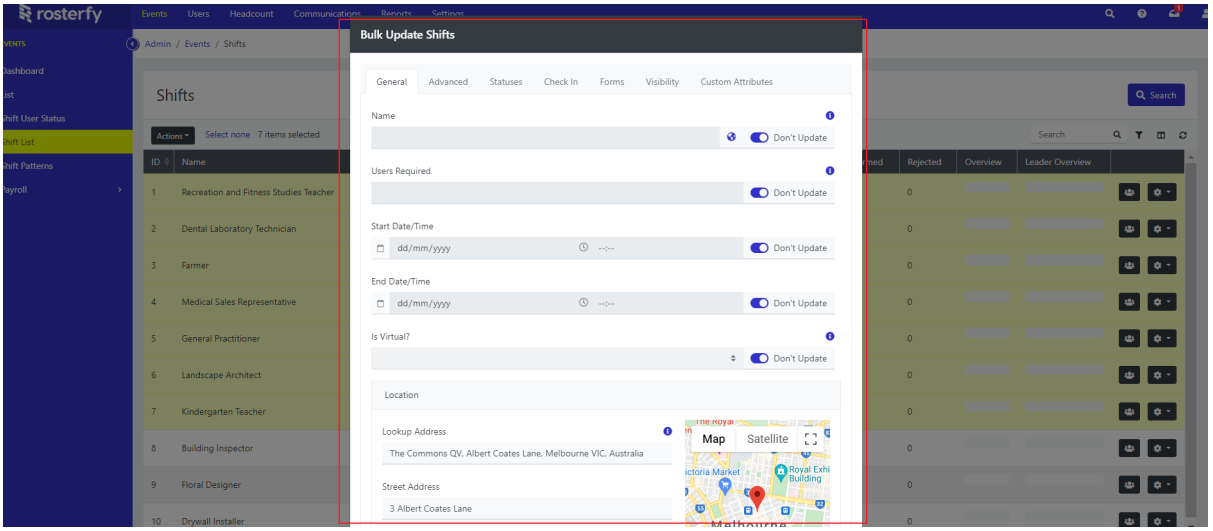
Bulk Update of Shifts from Shift List

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.

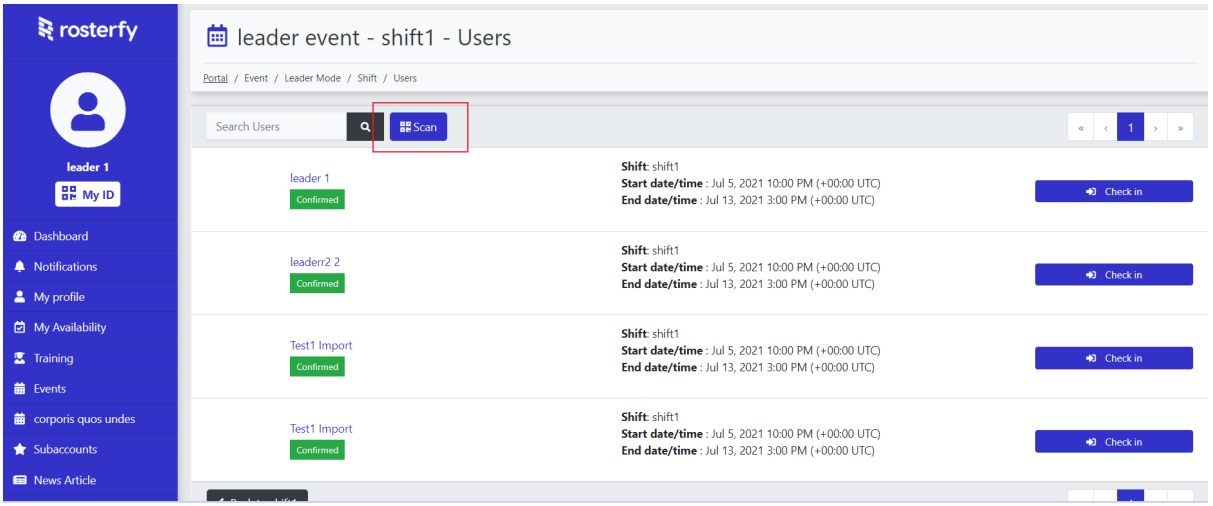


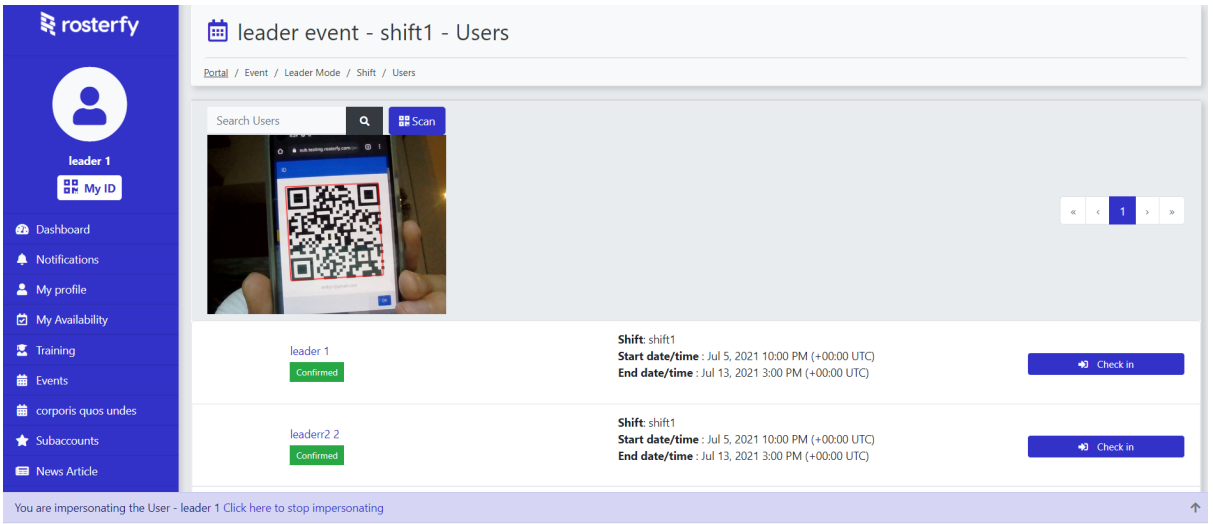


QR Code Scanner for Shift Check-In

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').





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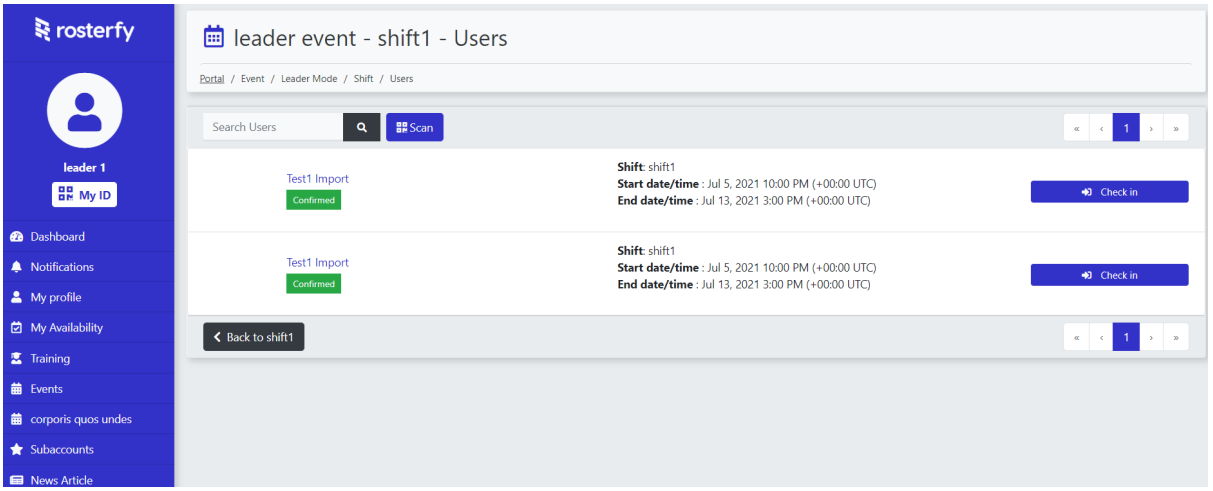
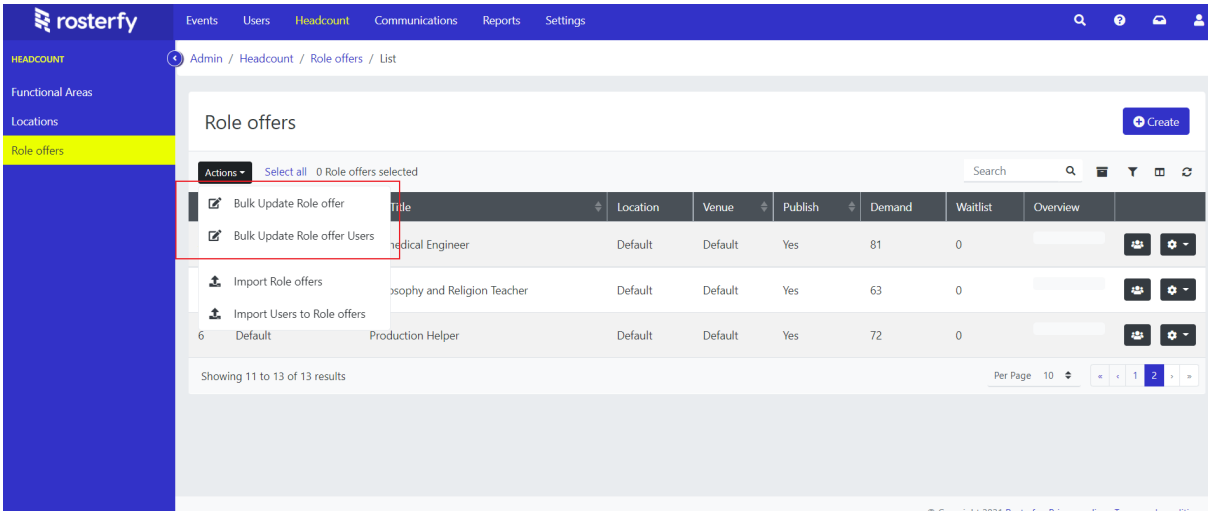
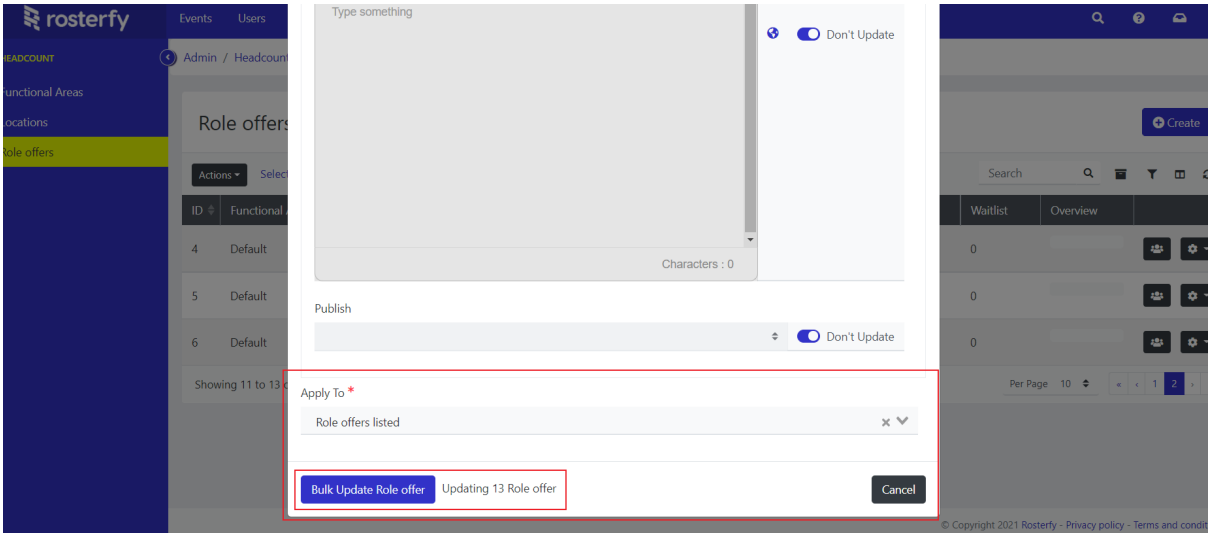

rosterfy
leader 1
My ID
Dashboard
Notifications
My profile
My Availability
Training
Events
corporis quos undes
Subaccounts
News Article
leader event - shift1 - Users
Portal / Event / Leader Mode / Shift / Users
Search Users
Scan
Test1 Import
Confirmed
Shift: shift1
Start date/time : Jul 5, 2021 10:00 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.