

## Product Release Notes for Rosterfy 2.0 – 19<sup>th</sup> April 2021

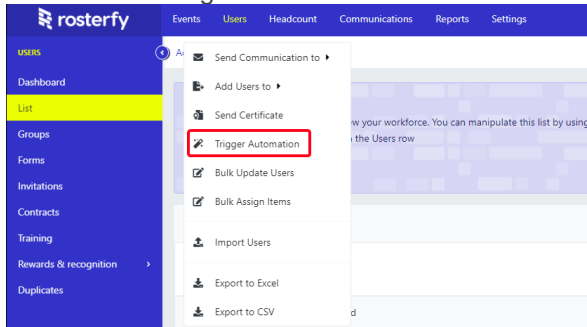
### Contents

General.....	2
New automations .....	2
Copy permission roles.....	2
Address attribute filter .....	2
Subaccount categorising.....	2
Partial search on dropdown options.....	3
Date attribute manual entry.....	3
Navigation shortcuts always visible.....	3
Subaccount checkpoint visibility.....	4
Subaccount account visibility setting .....	4
Auto update rule OR logic.....	4
Events .....	5
Event/Shift count by attribute .....	5
Event attribute column reorder.....	5
Scheduled start automation after shift start .....	5
Minimum shift application per user.....	6
Event Timesheets bulk update.....	6
Headcount planning .....	6
Role offer status automation .....	6
Maximum roles per user.....	6
Communications .....	6
File in new window .....	6
Integrations.....	6
Mailchimp integration .....	6

## General

### New automations

**Admin Console request on candidate list** task allows the admin user to manually trigger an automation to apply actions on the user listing

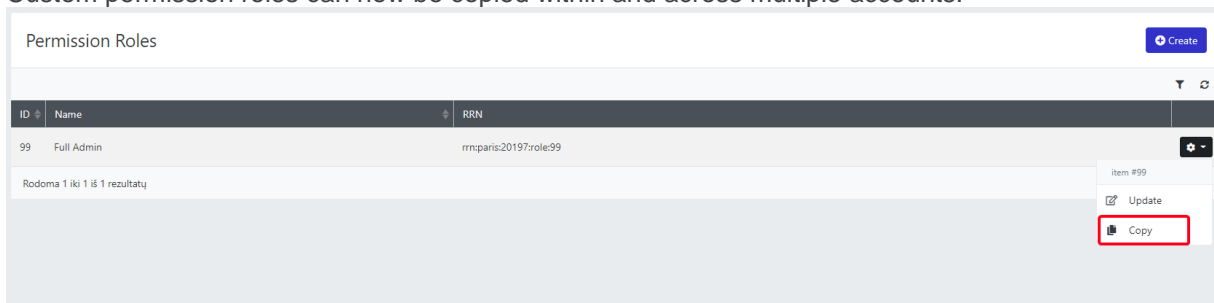


This was created to allow for simultaneous checkpoint change and sending communications but will work for all automation actions on the user listing.

**User joins sub account** task will allow user when they join a subaccount to have an Automation action. When there is a parent and child account registration process an automation action will be performed as the user joins the account

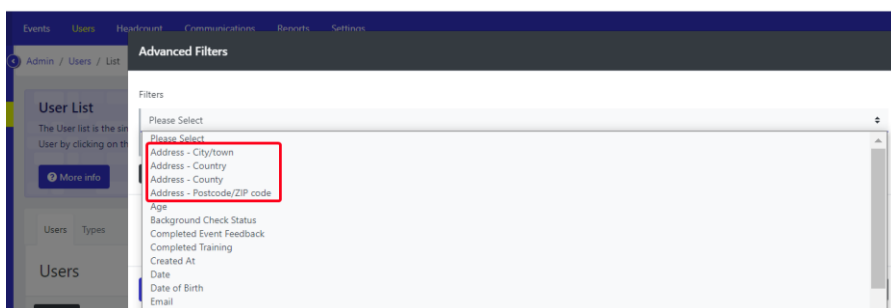
### Copy permission roles

Custom permission roles can now be copied within and across multiple accounts.



### Address attribute filter

Address attributes can be filtered on country, region, city and postcode.

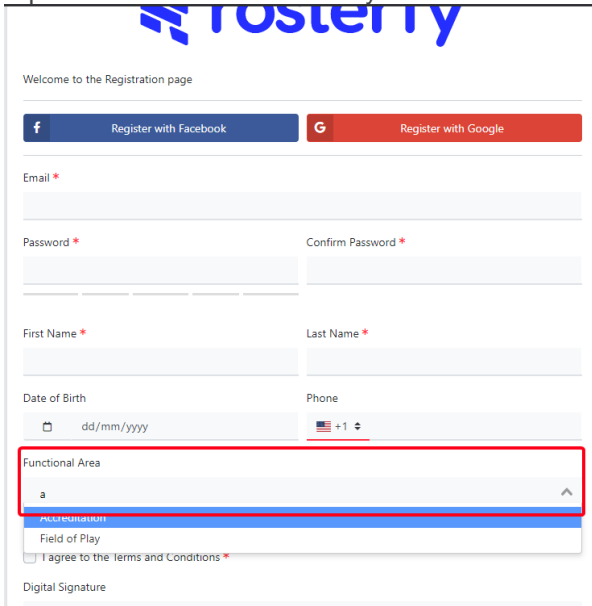


### Subaccount categorising

Subaccount admin users can now categorise attributes using categories that were created on a parent account to assist with better organising attributes on the admin profile view.

## Partial search on dropdown options

A partial search can be done by a user when selecting options for dropdown (select one) attributes on a form



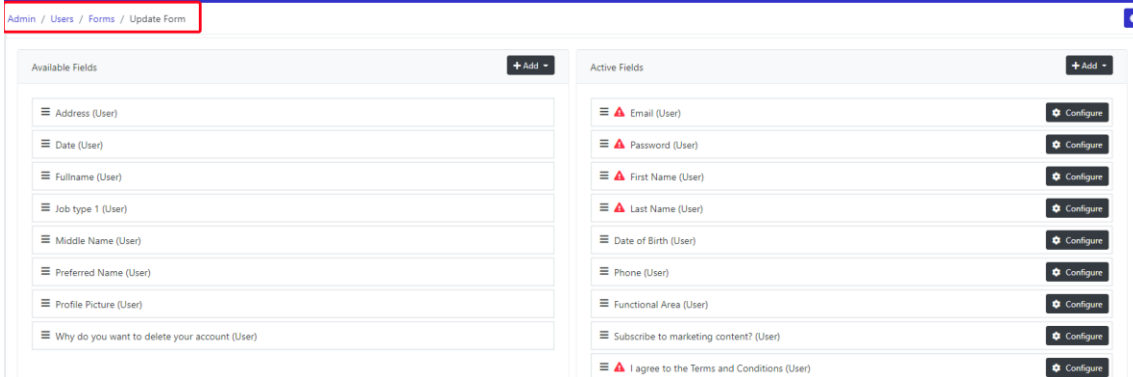
The image shows a registration form with the following fields: Email, Password, Confirm Password, First Name, Last Name, Date of Birth (with a calendar icon), and Phone (with a country code dropdown). A dropdown menu for 'Functional Area' is open, showing a search bar with the letter 'a' and a list of options including 'Field of Play'. Below the dropdown is a checkbox for 'I agree to the Terms and Conditions' and a 'Digital Signature' field.

## Date attribute manual entry

Date attributes can now be completed by a user typing numbers or selecting from the calendar icon.

## Navigation shortcuts always visible

Shortcuts (breadcrumb links) will always be visible at the top of the page to assist with admin user navigation.



The image shows an admin interface with a breadcrumb trail at the top: 'Admin / Users / Forms / Update Form'. Below this are two panels: 'Available Fields' and 'Active Fields'. The 'Available Fields' panel lists various user attributes like Address, Date, Fullname, Job type, Middle Name, Preferred Name, Profile Picture, and Why do you want to delete your account. The 'Active Fields' panel lists the same attributes currently active on the form, each with a 'Configure' button. A red box highlights the breadcrumb trail.

## Subaccount checkpoint visibility

Checkpoints can now define which subaccounts a user can see to control access.

Admin / Settings / Advanced / Checkpoint / Update Checkpoint

Can view Event history?

Can access Training?

Can submit questions to contact center

Can access News Articles?

Can access Reward Points?

Can access Inventory?

Can access Fundraising?

Subaccount Access **nathans-subaccount**

Can access availability functionality?

Can access certificates?

Save

## Subaccount account visibility setting

A Portal account setting will define on an account level the accounts which are available to a user, so that a subaccount of a subaccount is visible.

Update Account: nathans-subaccount (#20258)

General Users Events Training Communication Branding Limits Headcount Portal

Settings

Visible Stats  Activated?

Show Photo Status  No  Activated?

Portal QR Code Attribute  User RRN (Recommended)  Use default?  Activated?

Only attributes that you have configured as unique are available

Show all descendant accounts  Yes  Use default?  Activated?

Save

## Auto update rule OR logic

When creating an auto update group rule, OR logic can be used to assist with registration selection to define a user criterion.

Name \* Area

Type Select one

Auto Update Add Only

Rules

Functional Area

Is Equal To Accreditation

**OR** Job type 1

Is Equal To Handyman

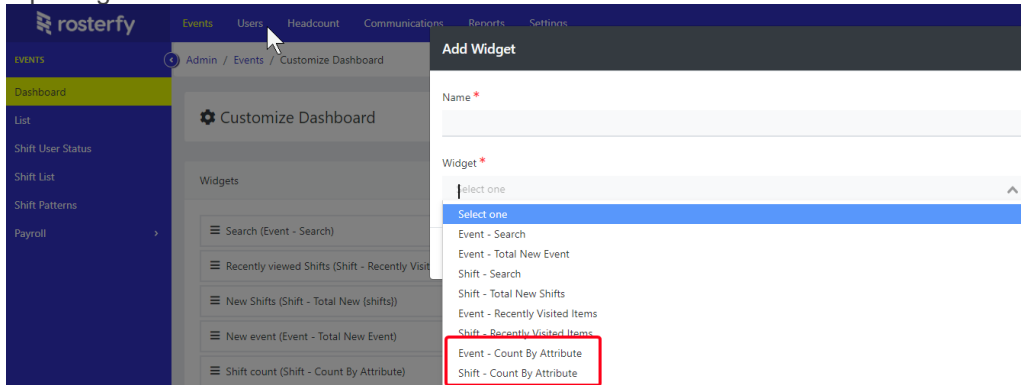
+ Add Rule

Save

## Events

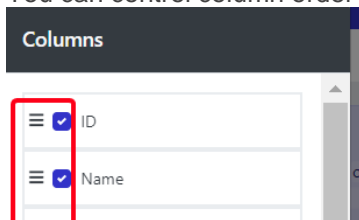
### Event/Shift count by attribute

New dashboard widgets to allow admin users to quickly report on event/event shift attribute counts. This is to assist with reporting on when an event is a role or other event/shift attribute.



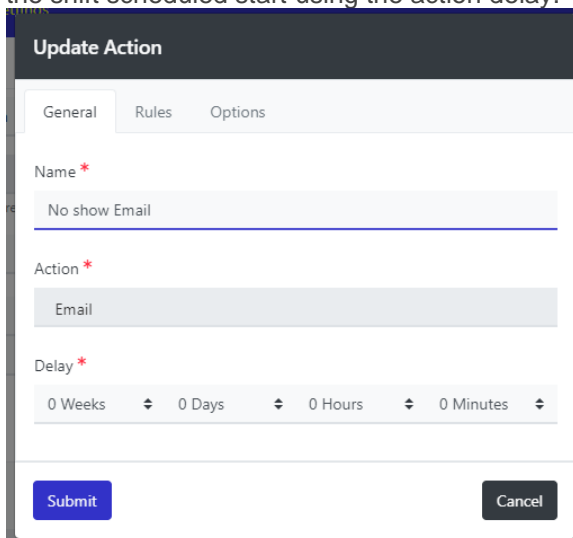
### Event attribute column reorder

You can control column order and visibility from the column button.



### Scheduled start automation after shift start

The Event Shift scheduled start (shift reminder) automation will trigger before using the automation task delay and/or after the shift scheduled start using the action delay.



This is a system change as previous automations were only triggered at or before the scheduled shift start. Adding this flexibility will allow for communications to be performed after a shift has started.

## Minimum shift application per user

The Event settings can be configured to set a minimum shift application.

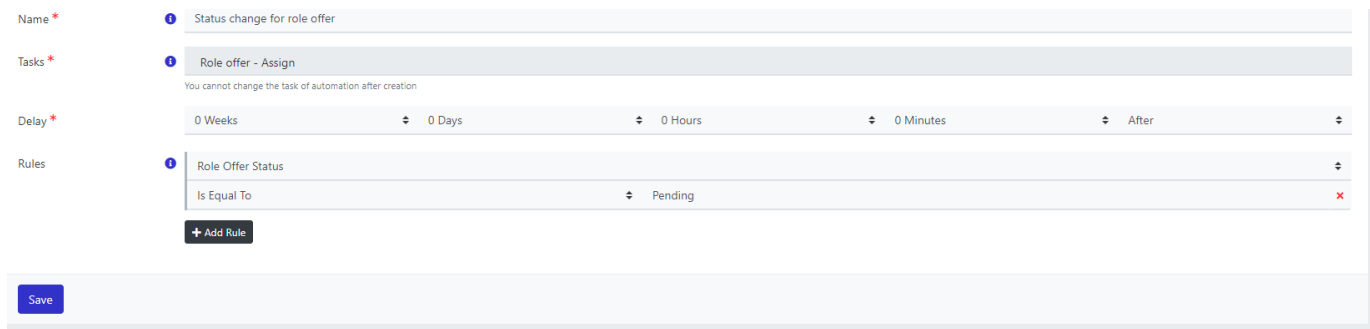
## Event Timesheets bulk update

Event Timesheets bulk update can trigger a reward item assignment to assist with any check in post event.

## Headcount planning

### Role offer status automation

New automation- **Role offer- Assign** can be triggered when a status for a role offer user has been assigned.



The screenshot shows the configuration for a new automation rule. The fields are as follows:

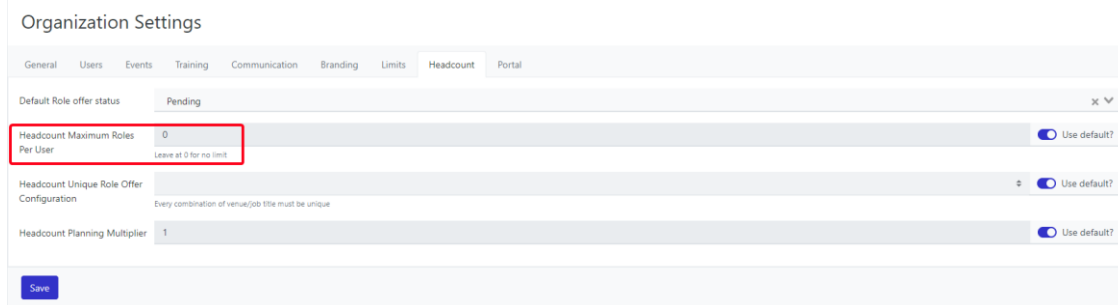
- Name \***: Status change for role offer
- Tasks \***: Role offer - Assign (Note: You cannot change the task of automation after creation)
- Delay \***: 0 Weeks, 0 Days, 0 Hours, 0 Minutes, After
- Rules**: Role Offer Status (Is Equal To Pending)

Buttons: + Add Rule, Save

This automation is to assist with the movement of an **Assigned** status to a **Pending** or **Confirmed** to automatically show a new dashboard and send communication easily.

### Maximum roles per user

An account setting can be used to set the maximum number of roles per user.



The screenshot shows the 'Organization Settings' page with the 'Headcount' tab selected. The 'Headcount Maximum Roles Per User' setting is highlighted with a red box and is set to 0. Other settings include 'Default Role offer status' (Pending), 'Headcount Unique Role Offer Configuration' (Every combination of venue/job title must be unique), and 'Headcount Planning Multiplier' (1). Buttons: Save

## Communications

### File in new window

When a file is opened on the file listing page it will automatically open in a new tab.

## Integrations

### Mailchimp integration

Users can be sync'd with Mailchimp to send marketing email campaigns.