R rosterfy

Product Release Notes for Rosterfy 2.0 – 4th May 2021

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General

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

Availability Update

Candidates now have a more streamlined option for updating their availability. The visuals have been simplified.

জ্ব TOSLETTY	🖽 My Availability	
	Portal / Availability / List	
8	Daily Avraoility	• Exceptions •
Marlen Dicki	Sun 🗹 All day	+ Aa An Exception
III My ID	🗹 Mon 🕑 All day	+ Description *
2 Dashboard		+
A Notifications	🔽 Tue 🛛 All day	Stalt Da
💄 My profile	🕑 Wed 🕑 All day	+ 🖻 d (mm/yyyy
My Availability	🕑 Thu 🕑 All day	+ End D + *
 Training Events 	🕑 Fri 🗹 All day	+ dd/mm/yyyy
asperiores eart a beataes	🕑 Sat 🕑 All day	+ All day?
★ Subaccounts		Add Exception
News Article	Save	
S Event History		
Quia facere voluptas magni totam.		
Est similique est dignissimos unde beatae.		
· · · ·		

Candidate Portal can see Reward inventory items

Candidates can now see a list of all inventory items they have been allocated under the Rewards section (if accessible)

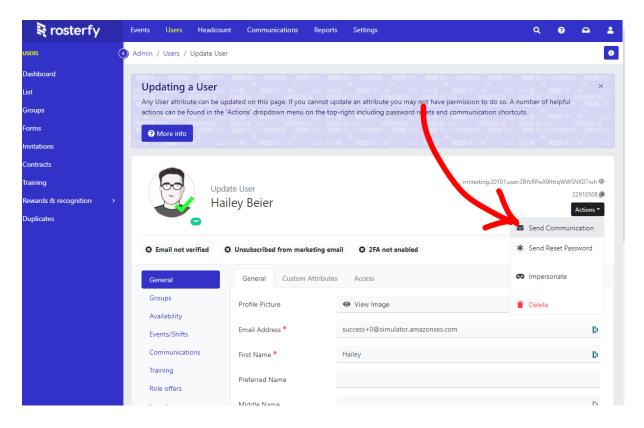
	Halley Beier Click here to stop impersonating
st rosterry	📅 Redeem items
	Portal / Revards / Redeem Revards
	🕇 0 points
Hailey Beier	No results were found
2 Dashboard	My Certificates
A Notifications	No results were found
💄 My profile	
🖻 My Availability	My Items
🗵 Training	test123auto Seriai: 8
🛱 Events	
asperiores earum beataes	
🚖 Subaccounts	
News Article	
Sevent History	
🖶 Quia facere voluptas magni totam.	
🖶 Est similique est	
# Rewards	

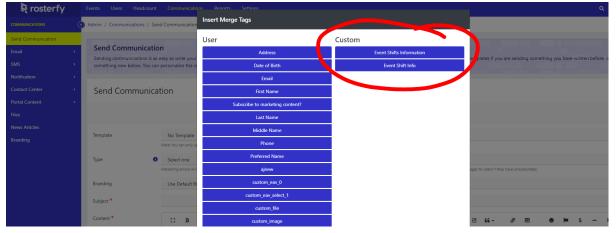
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Users can be emailed Shift Details from User Profile Page

Admins can now email candidates their shift information directly from their profile page, via new email merge tags as per below screenshots



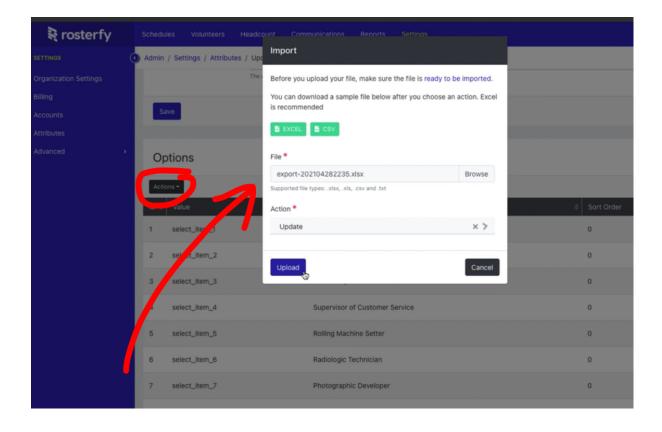




Importing options for an Attribute available in different languages separately

Admins can now import Attribute options in different languages. Simply select the separate language (if relevant) and import as per normal and it will load against that language.

R rosterfy	Schedules	Volunteers	Headcount	Communications	Reports	Settings			۹	. 0	2	
	Admin / Sett	tings / Attribute	es / Update At	tribute								
ganization Settings												
ling	Update A	ttribute						1		lt Languag		
counts		n_eav_sel	ect_1					8		l ish (Unite Language		
tributes										itsch Rais (Fran	ce)	1
Ivanced >	General	Advanced										
	Name *		Custom_	eav_select_1								
	Portal Labe	el	0								0	
	Code *		custom_	eav_select_1								
	Entity *		0 Volunte	er								
			The entity ca	nnot be changed after cre	eating the attribu	te						
	Field Type	•		(Select one)								
			The attribute	type cannot be changed	after being creat	ed						
	Save										Preview	



Reference restarting

Uplifted Form field editing options

Admins will now have additional options (see screenshot below) to help organise and order Form fields better. They will now find it easier to create and update forms with an updated user interface, particularly using the drag and drop or arrows.

R rosterfy	Events Users Headcount Communications Reports Settings	Q 😧 🖴
USERS	Admin / Users / Forms / Update Form	
Dashboard	Update Form	17 🍺
List	Event Shift User Interaction	Actions -
Groups		
Forms	General Advanced Content	
Invitations	Name * O Event Shift User Interaction	
Contracts	Type * O Event Shift User Interaction	
Training		
Rewards & recognition	Available Fields + Add + Add +	+Add -
	≡ ajnew (User) ■ □ □ <t< td=""><td></td></t<>	
	E Check-In Date/Time (Event Shift User)	
	E Check-Out Date/Time (Event Shift User)	
	E custom address attribute (User)	
	E custom address attribute (Event User)	
	E custom boolean attribute (Event User)	(+ ↓ ↑]*[↓]

EOI and Complete Application form names can be renamed

Admins will now be able to rename the Expression of Interest and Complete Application forms, for Candidates to see in the Candidate portal, if needed. This is, as per all other site terms, controlled under Communications > Portal Content > Terms > Admin

😫 rosterfy		Events	s Users	Headcount	Communications	Reports	Settings						
COMMUNICATIONS	(Admi	n / Commun	ications / Term	s								
Send Communication			User groups *	k	User groups								
Email	>		Account *		Account							•	
SMS	>												
Notification	>		Accounts *		Accounts								
Contact Center	>		Parent Accou	nt*	Parent Account								
Portal Content	~		Parent Accou	nts *	Parent Accounts								
Content													
 Terms 			Subaccount *		Subaccount								
 Merge Tags 			Subaccounts	*	Subaccounts								
 Web Links 			lois		Join Subaccount								
Files					Join Babaccount				/				
News Articles			Expression of	Interest *	AJ EOI								
Branding			Complete Ap	plication *	EOI needs to be o	ompleted ple	ase complete	1					
		2	Save										



Bulk Update warning added

Admins will now receive a warning whenever they are doing any bulk updates across the Rosterfy platform. This will apply to: users, events, shifts, event shift users, role offers, role offer users, and any bulk deletes.

R rosterfy			
USERS (Admin / Users / List	Bulk Update Users	
Dashboard	Profile Picture	Checkpoint	
List	Ø	💽 Don't Up	Aug 25, 1967
Groups	8	Can apply to Shifts as Leader?	Oct 24, 1967
Forms	8	÷ 💽 Don't Up	date Apr 30, 1966
Contracts	8	Туре	Nov 19, 1987
Training	Ø	Are you sure	Aug 8, 1982
Rewards & recognition >	8	Profile Pictur Status Are you sure you want to update 211 Users?	ndate Mar 10, 1981
	Ø	Apply To *	Jul 25, 1994
	Ø	All listed Users	x 🔨 Sep 11, 1989 🔺
	ø	Save Updating 211 Users	Dec 31, 1996
		22910508 success+0@simulator.amazonses.com (+61) 296564536	Mar 4, 1967 💄
			Per Page 10 🗢 🤘 « 🤟 19 20 2

Events & Shifts

Shifts can be specifically ordered

Admins can now specify the order shifts will appear to candidates, allowing them to promote specific shifts. This is in ascending order (0 will appear highest, then 1, 2, etc.)

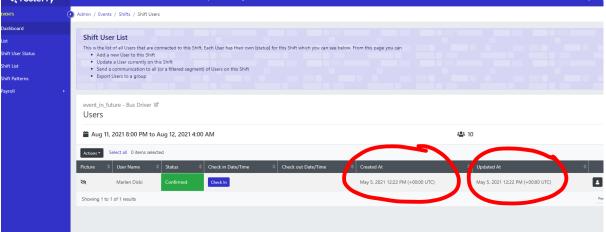
😫 rosterfy	Events	Users	Headcount	Communications	Reports	Settings	
EVENTS (Admin /	Events /	Shifts / Updat	te Shift			
Dashboard				Is Virtual?	0		
List				is virtual.	• •		
Shift User Status				Location *			
Shift List				Lookup Address *	0	Look up a location to pre-fill address fields	_
Shift Patterns				Lookap Address	, The second sec		Мар
Payroll >				Street Address *		58305 Klein Ways	
				*		b	
				City/Town *		East Brayan	
				Zip Code *		75568-7308	
				State *		vic 🎼	Google
				Country *		Australia 🗙 🗙	Drag and drop the pi map to re-add marke
			6	Sort Order	0	2	
				Publish	0 🖸		
				ruunsti	• •		
				Save			

R rosterfy

New column options in Shift User List view

Admins can now see Created At and Updated At per user in the Shift User List view, and also Event User List view (same as Shift View below)

😫 rosterfy	Events Users Headcount Communications Reports Settings	Q 0	•
EVENTS) Admin / Events / Shifts / Shift Users	Columns	
Dashboard Lat Shift User Status Shift List Shift Patterns Payroll	Shift User List This is the list of all Users that are connected to this Shift. Each User has ther own (status Add areas User to this Shift Update a User connected to of a filtered segment) of Users on this Shift a good Users to a group Event, in, future - Bus Driver (B) Users Martin 1, 2021 B:00 PM to Aug 12, 2021 4:00 AM Event Status Marten Dick Marten Dick Confirmed	completed at Pre Checkin Form completed at Checkin Location Checkin Location User Profile Picture	 Ad- III III
र्दे rosterfy	Events Users Headcount Communications Reports Settings	Save Cancel	
EVENTS (Admin / Events / Shifts / Shift Users		



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Alert when Shift Leader capacity reached

Admins will now see an alert when the amount of Shift Leaders on a Shift is already filled, when assigning an additional Shift Leader

EVENTS	🕐 Admin / Events / Shifts / Shift Users	Add User	
Dashboard List Shift User Status Shift List Shift Patterns	Shift User List This is the list of all Users that are connected to this Shift. Each User has the Add a new User to this Shift • Adda a User currently on this Shift • Update a User currently on this Shift • Send a communication to all (or a filtered segment) of Users on this • Export Users to a group	User * Rosterfy Testing (admin@rosterfy.com) Status * Sector * Please Confirm	
Payroll →	event_in_future - Bus Driver @ Users Aug 11, 2021 8:00 PM to Aug 12, 2021 4:00 AM	We have found the following issue(s): Leader demand is already full for this Shift Do you still want to add this User to the Shift anyway?	<i>*</i> ≛ 10
	Actions Select all 0 (terms selected Picture User Name Warlen Dicki Confirmed Showing 1 to 1 of 1 results	No Ver	Updated At (+00:00 UTC) May 5, 2021 12:22 PM (+
		Submit Cancel	

Minor update to Shifts List ordering

The Shifts List view has had a minor update, where the top of the list will default the next future Shift, for easier more relevant Shift listing to Admin users

R rosterf	Y	Events Us	sers Headcount	Congnunications	Reports Settings						Q 🕜 🛃
	Q	Admin / Eve	nts / Shifts								
Dashboard											
		Shifts									Q Sear
Shift User Status		Actions -									τ 🗆
Shift List Shift Patterns		ID \$	Name 🗘	Date/Time From	Date/Time To	Demand Leade	r Pending	Confirmed	Rejected	Overview	Leader Overview
Payroll	,	21154800	needs_feedback	Apr 19, 2021 4:00 AM	Apr 19, 2021 4:00 PM	10 0	0	0	0	•	
		21154799	should_checkin	Apr 20, 2021 4:00 AM	Apr 20, 2021 1:00 PM	10 0	0	1	0	•	
		21154803	Shift_0	Apr 20, 2021 10:00 AM	Apr 20, 2021 4:00 PM	10 0	0	2	0	•	
		21154804	Shift_1	Apr 20, 2021 10:00 AM	Apr 20, 2021 4:00 PM	10 0	0	2	0	•	
		21154805	Shift_2	Apr 20, 2021 10:00 AM	Apr 20, 2021 4:00 PM	10 0	0	2	0	•	
		21154806	Shift_3	Apr 20, 2021 10:00 AM	Apr 20, 2021 4:00 PM	10 0	0	2	0	•	
		21154807	Shift_4	Apr 20, 2021 10:00 AM	Apr 20, 2021 4:00 PM	10 0	0	2	0	•	



Reporting

Admins can now reports on what training candidates have completed

Admins can now reports on what training candidates have completed in a new Report Type. This means reports can be generated to capture and check, per event/per shift/per user, if training has been completed.

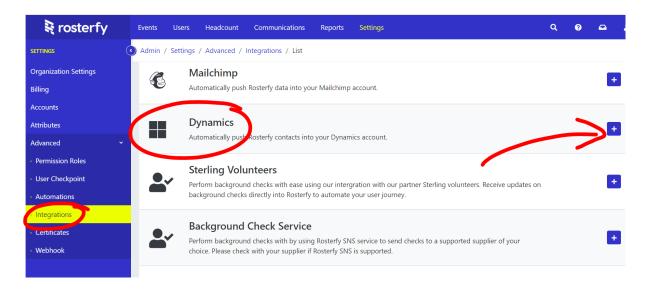
😫 rosterfy	Events Users Headc	ount Communications Reports Settings
REPORTS	Admin / Reports / Create	Report
List		
System Log	Create Report	
		Type Columns Filters Sorting
	Name *	TEST
	Report Type *	elect one
		The n All Events
	File Type *	s All Event Shifts All Event Shift Users
	With Media Files?	All Role Offer Users
	With Sub-accounts?	All Event Users All Inventory Item
		All inventory item Users
		All Email Recipients Training Report
		Training User Report
		User Subaccount Involvement
		Deleted Users



Integrations

Microsoft Dynamics Integration

Admins can now integrate and synchronise their candidate data with Microsoft Dynamics



😫 rosterfy	Events	Users	Headcount	Communications	Reports	Settings			۹	?	•	
SETTINGS	 Admin , 	/ Settings	/ Advanced /	Integrations / Updat	e Integration							
Organization Settings												
Billing	Update Integration									crm:	dynamics 🛙	iamics 🌓
Accounts	Dy	namics	5									
Attributes	Gen	eral										
Advanced ·	-											
Permission Roles	Dynar	nics Resou	rce URL *									
User Checkpoint			1	ynamics CRM URL, ie http	s://organization.	crm11.dynamics.com						
Automations		able										
Integrations		able	'									
Certificates												
Webhook			-									