

Product Release Notes for Rosterfy 2.0 – 25th January 2021

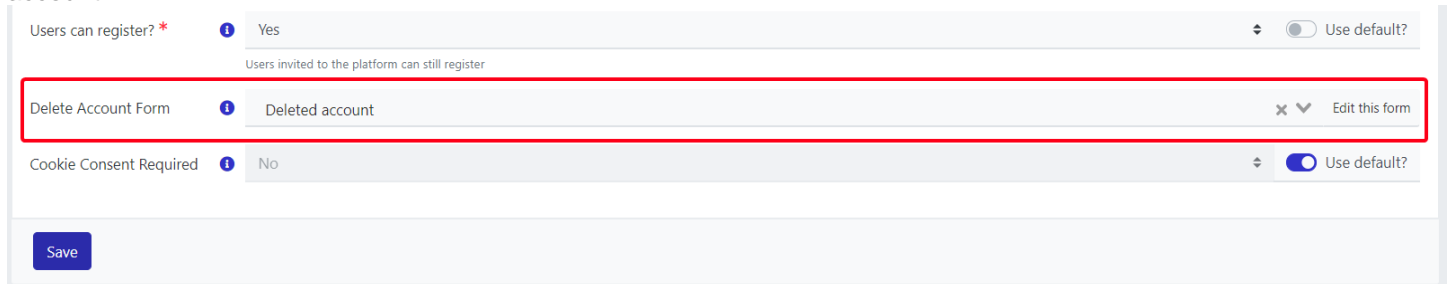
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General

Account delete form

A user interaction form can now be added to the organisation setting for a user to complete when they delete their account.



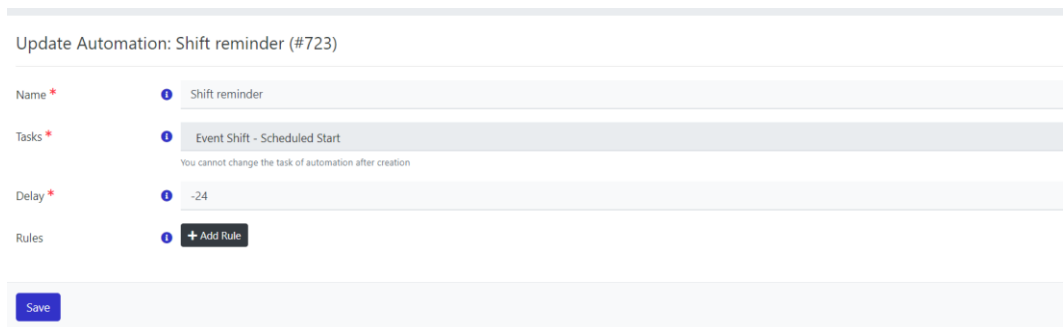
The screenshot shows the 'General' settings page with the following configuration:

- Users can register? ***: Yes (with an 'i' icon and 'Use default?' toggle)
- Users invited to the platform can still register**: (subtext)
- Delete Account Form**: Deleted account (with an 'i' icon, 'x' icon, and 'Edit this form' link)
- Cookie Consent Required**: No (with an 'i' icon and 'Use default?' toggle)

A 'Save' button is located at the bottom left of the settings panel.

Default shift reminder email

A new default automation has been added to all accounts to provide a shift reminder 24 hours before shift.



The screenshot shows the 'Update Automation: Shift reminder (#723)' configuration page with the following settings:

- Name ***: Shift reminder
- Tasks ***: Event Shift - Scheduled Start (with subtext: 'You cannot change the task of automation after creation')
- Delay ***: -24
- Rules**: + Add Rule

A 'Save' button is located at the bottom left of the configuration panel.

The email template for the shift reminder can be configured in the Communication template and will only be available for new accounts automatically.

Bulk update group actions

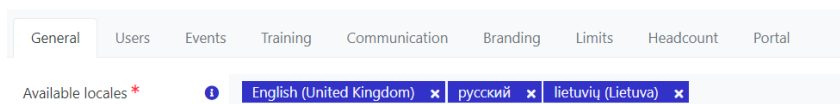
Additional bulk actions have been added to the Group list and Group user list. These are:

- Bulk delete group users
- Bulk delete groups
- Bulk assign group users to shifts
- Bulk assign group users to training
- Bulk assign group users to role offers

New language Lithuanian and Russian

Russian and Lithuanian are now available locales for system default terms.

Organization Settings



The screenshot shows the 'Organization Settings' page with the following configuration:

- Available locales ***: English (United Kingdom) x, русский x, lietuvių (Lietuva) x

The 'General' tab is selected in the top navigation bar.

Remove subaccount users

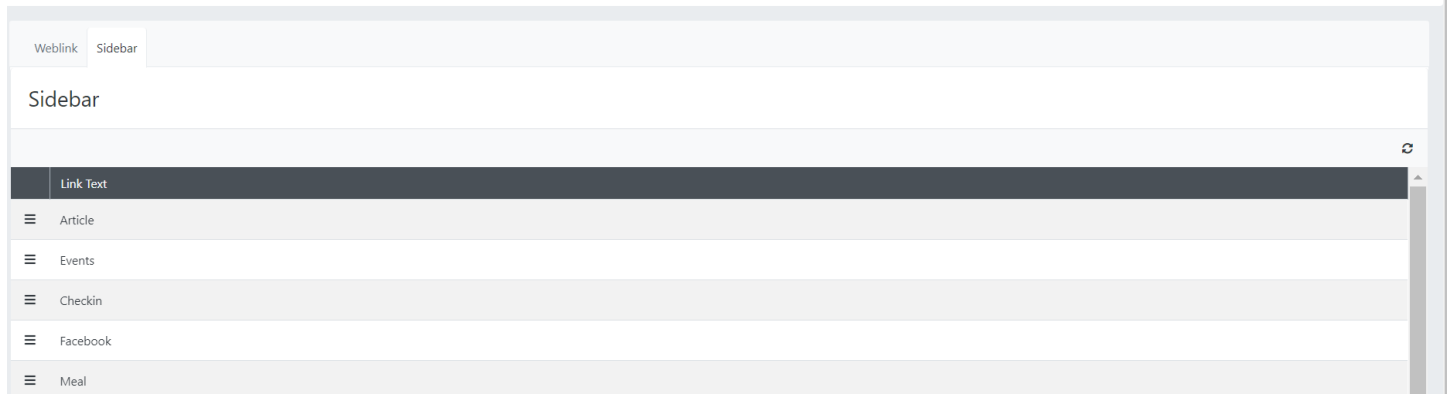
Admin users are now able to remove child account users without deleting their profile.

Communication

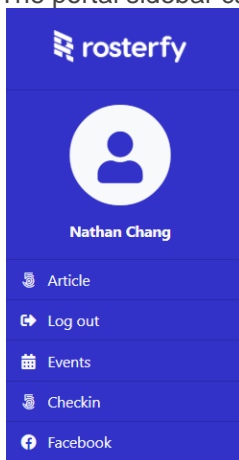
Portal Sidebar order

The Communication weblink now contains Sidebar tab where you can reorder the portal sidebar.

Admin / Communications / Web Links / List



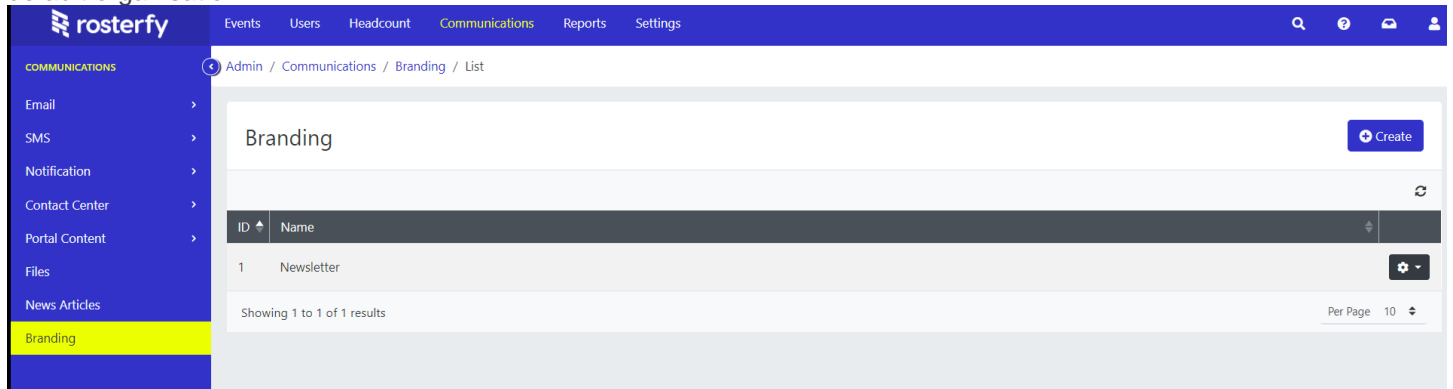
The portal sidebar can be adjusted to prioritise how items in the sidebar are displayed.



This is useful as you can also use weblinks to create shortcuts and highlight important sections of the portal such as shifts or articles.

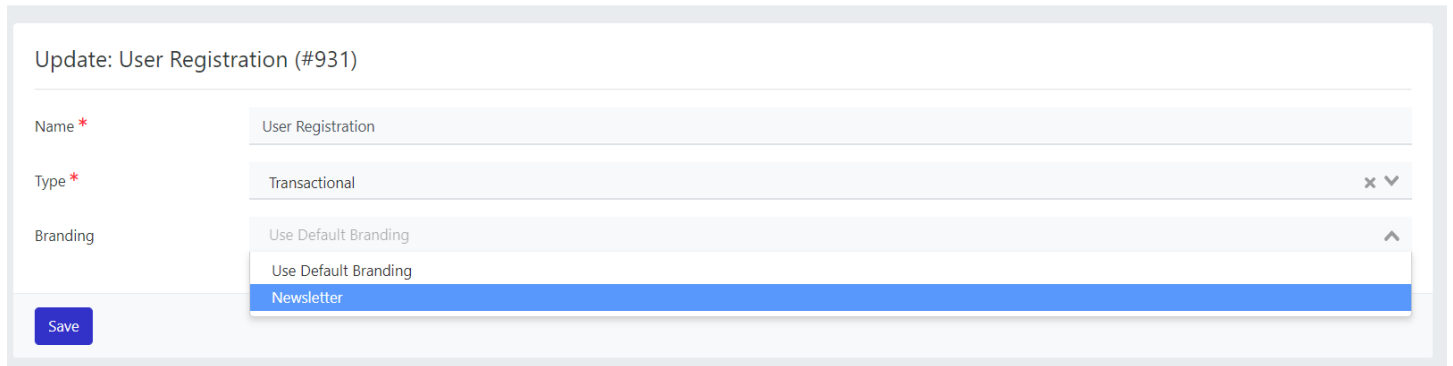
Custom template branding

Email templates can now be individually branded with different headers from the default organisation.



Once a custom branding has been created this can be added into a email template for use via manual send or automation action.

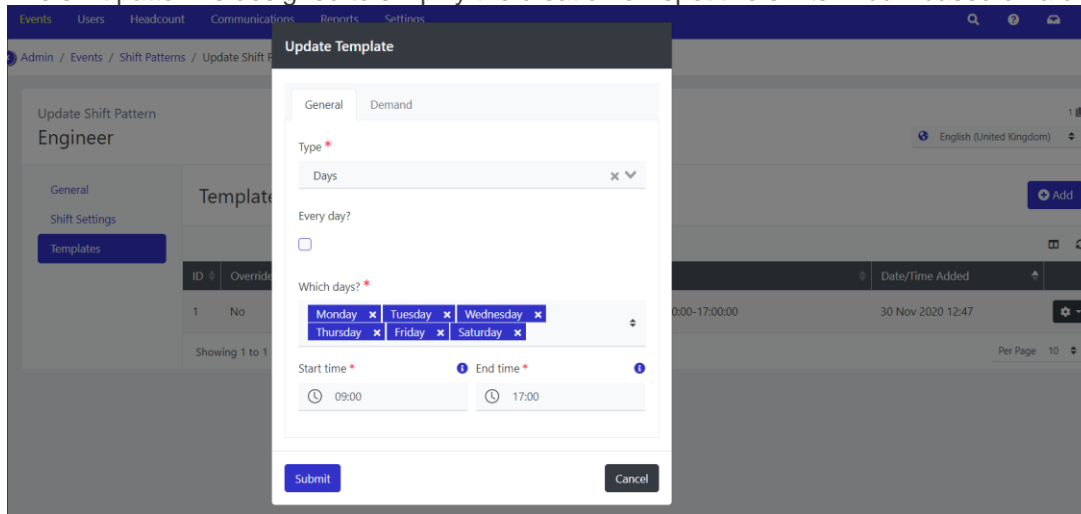
Admin / Communications / Email / Templates / Update



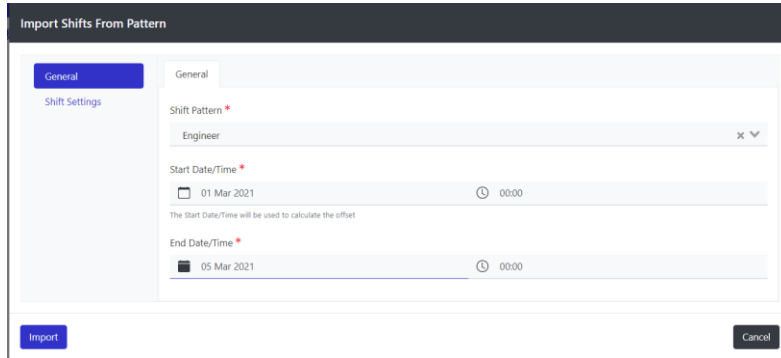
Event

Shift Patterns

The shift pattern is designed to simplify the creation of repetitive shifts in bulk based on a criteria and shift defaults.




Once the shift default settings are created you can create a template for shift creation. The template can be configured to create shifts based on either an offset from a point in time, or a day of week with start/end time. These can then be used in an event to create shifts in bulk between a start and end date according to the defined pattern.



Shift waitlist

There is a new organisation event setting to add users to waitlist if their shift is full up to a specified amount.



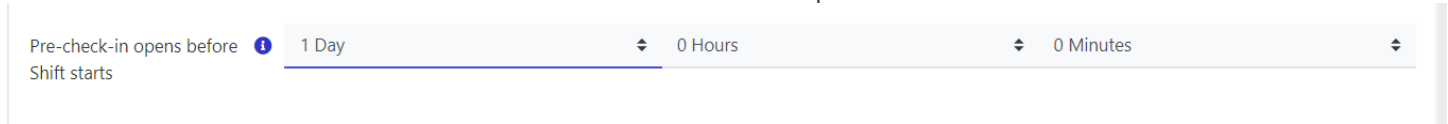
The full shift option will display within the portal as an additional button for user to join the waitlist.



When part of the waitlist an admin must manually assign a user onto the shift when space is available. When using the waitlist it is recommended to use an automation to notify the admin that a space is available for the waitlisted shift.

Pre-checkin form

Before checkin is available a pre-checkin form has been added to the Organisation event settings. The event shift interaction form will allow an admin user to be notified of information prior to checkin at a set time.



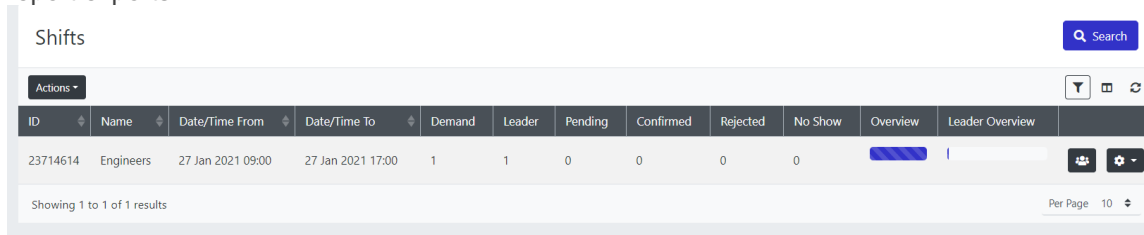
This to assist in getting advanced notification prior to the day of the shift.

Shift list (Daily Checkin)

The shift list or Daily checkin has been added to the Event module to show all shifts available on a day across all events. This will assist in making it clear to the admin the shifts that will require checkin regardless of the event they are within.

Custom shift status

Custom shift status are now available to be added to the column and event shift report exports.



The screenshot shows a table titled "Shifts" with a search bar and an "Actions" menu. The table has the following columns: ID, Name, Date/Time From, Date/Time To, Demand, Leader, Pending, Confirmed, Rejected, No Show, Overview, and Leader Overview. A single row is displayed with the following data: ID 23714614, Name Engineers, Date/Time From 27 Jan 2021 09:00, Date/Time To 27 Jan 2021 17:00, Demand 1, Leader 1, Pending 0, Confirmed 0, Rejected 0, No Show 0, and a blue bar in the Overview column. The footer indicates "Showing 1 to 1 of 1 results" and "Per Page 10".

ID	Name	Date/Time From	Date/Time To	Demand	Leader	Pending	Confirmed	Rejected	No Show	Overview	Leader Overview
23714614	Engineers	27 Jan 2021 09:00	27 Jan 2021 17:00	1	1	0	0	0	0		

This will assist in clearly showing shift statuses that are within the default categories.

Report

Middle Name attribute

Admin users can now view the middle name in all user attribute columns and reports.