

Product Release Notes for Rosterfy 2.0

General	2
QR Code Sizing Update - Email Merge Tag	2
Certificate Gridlines	2
Certificate File Download Name Improved	3
Dynamic Date Update for Widgets on Dashboard	3
Status Updates from Dropdown	3
Forms	4
'Is one of' Option included as Form Field Option	4
Headcount	5
New Background Check Automation Trigger	5
Role Offer User List Export Option	6
Payroll	7
3 New Hourly Payroll Rules	7
Integrations	8
Hubspot Integration	8

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

General

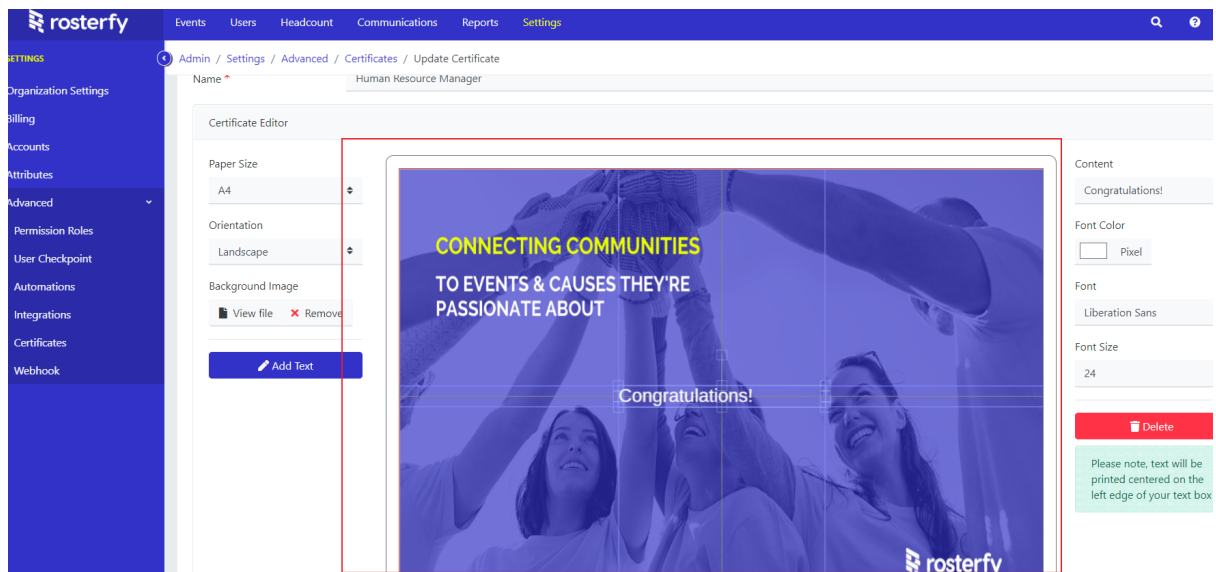
QR Code Sizing Update - Email Merge Tag

The QR code merge tag within email templates on Rosterfy, were showing QR codes (user check-in QR codes) that were too large (440x440 pixels). This has been updated to a more appropriate size for (240x240 pixels), particularly for mobile devices.



Certificate Gridlines

Within our Certificates module, Settings > Advanced > Certificates, we have now included a number of gridlines which your text will snap-to. This will help Admins be able to automatically align text more easily on certificates.



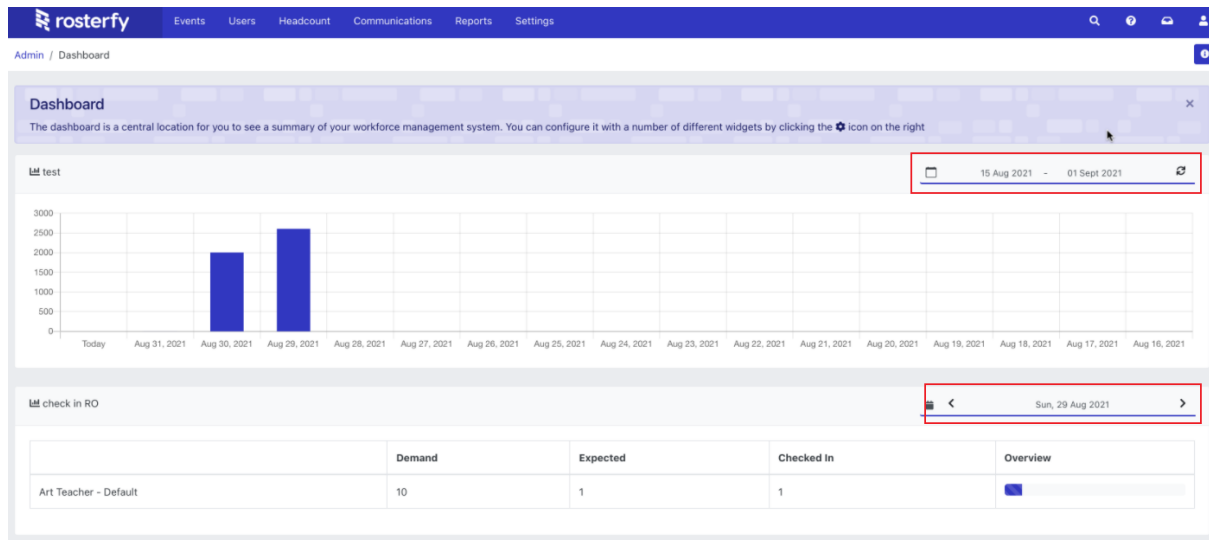
The screenshot shows the Rosterfy Certificate Editor interface. The sidebar on the left contains navigation links: SETTINGS, Organization Settings, Billing, Accounts, Attributes, Advanced, Permission Roles, User Checkpoint, Automations, Integrations, Certificates, and Webhook. The main content area is titled 'Certificate Editor' and displays a certificate template. The template features a background image of people raising their hands. The text on the certificate reads: 'CONNECTING COMMUNITIES TO EVENTS & CAUSES THEY'RE PASSIONATE ABOUT' and 'Congratulations!'. The interface includes settings for Paper Size (A4), Orientation (Landscape), Background Image, and Font (Liberation Sans, Size 24). A red box highlights the certificate template area. A 'Delete' button is visible at the bottom right.

Certificate File Download Name Improved

A small improvement; when users/volunteers download certificates now, the file name will include the name of the event associated. This will help users/volunteers with managing the file after downloading.

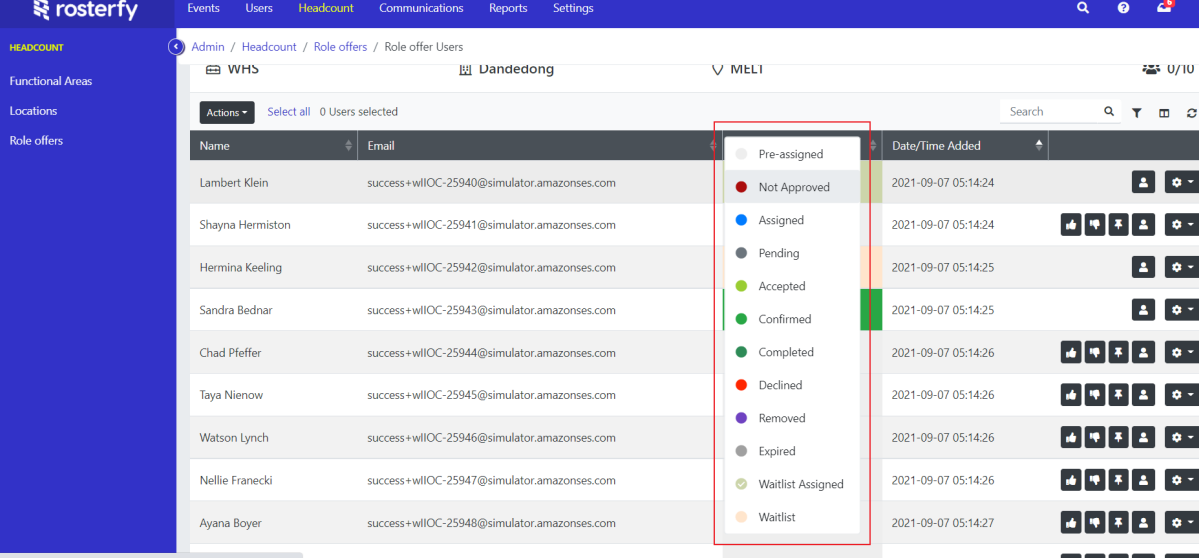
Dynamic Date Update for Widgets on Dashboard

The two dashboard widgets; User Sign-Up, and Check-In widgets now have date fields that can be updated/selected, as per screenshot below. This will update data dynamically.



Status Updates from Dropdown

Across the platform, statuses are now able to be updated from a click that will open a dropdown. This will enable Admins to update statuses much more easily and efficiently. This is available for the role offer user list, event-shift-user list, and user updates.

































rosterfy Events Users **Headcount** Communications Reports Settings

Admin / Headcount / Role offers / Role offer Users

WHS Dandedong M&L 0/10

Actions Select all 0 Users selected

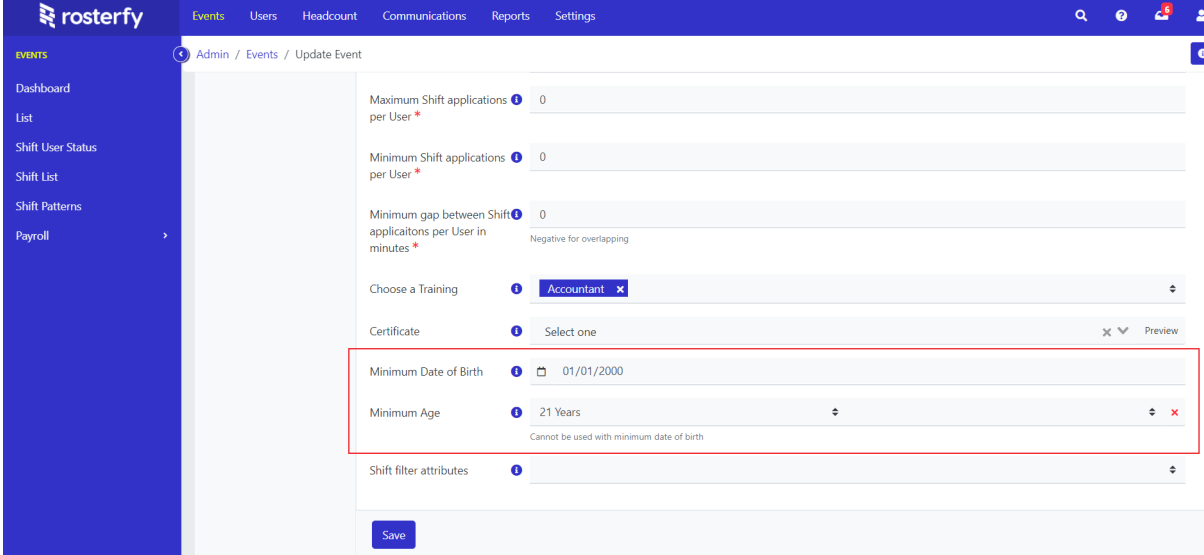
Name	Email	Status	Date/Time Added	Actions
Lambert Klein	success+wliOC-25940@simulator.amazonses.com	Pre-assigned	2021-09-07 05:14:24	 
Shayna Hermiston	success+wliOC-25941@simulator.amazonses.com	Not Approved	2021-09-07 05:14:24	   
Hermiona Keeling	success+wliOC-25942@simulator.amazonses.com	Assigned	2021-09-07 05:14:25	 
Sandra Bednar	success+wliOC-25943@simulator.amazonses.com	Pending	2021-09-07 05:14:25	 
Chad Pfeffer	success+wliOC-25944@simulator.amazonses.com	Accepted	2021-09-07 05:14:26	   
Taya Nienow	success+wliOC-25945@simulator.amazonses.com	Confirmed	2021-09-07 05:14:26	   
Watson Lynch	success+wliOC-25946@simulator.amazonses.com	Completed	2021-09-07 05:14:26	   
Nellie Franecki	success+wliOC-25947@simulator.amazonses.com	Declined	2021-09-07 05:14:26	   
Ayana Boyer	success+wliOC-25948@simulator.amazonses.com	Removed	2021-09-07 05:14:27	   

Expired Waitlist Assigned Waitlist

Min Age able to be set on Event Applications

Admins now are able to set up a minimum date of birth, or age, within Events. This is under Update Events > General > Advanced, as per the screenshot below.

This will enable restrictions on age to be set to applicants to any shifts within a particular event. Note that only one of the two functions can be used at any one time.



The screenshot shows the 'Update Event' form in the Rosterfy admin interface. The 'Advanced' tab is selected. The following fields are visible:

- Maximum Shift applications per User: 0
- Minimum Shift applications per User: 0
- Minimum gap between Shift applications per User in minutes: 0 (Note: Negative for overlapping)
- Choose a Training: Accountant
- Certificate: Select one
- Minimum Date of Birth: 01/01/2000
- Minimum Age: 21 Years (Note: Cannot be used with minimum date of birth)
- Shift filter attributes: (empty)

A red box highlights the 'Minimum Date of Birth' and 'Minimum Age' fields.

Improvements to System Performance

A number of back end infrastructure updates have been put into place this recent release, that will see improvements in the performance of:

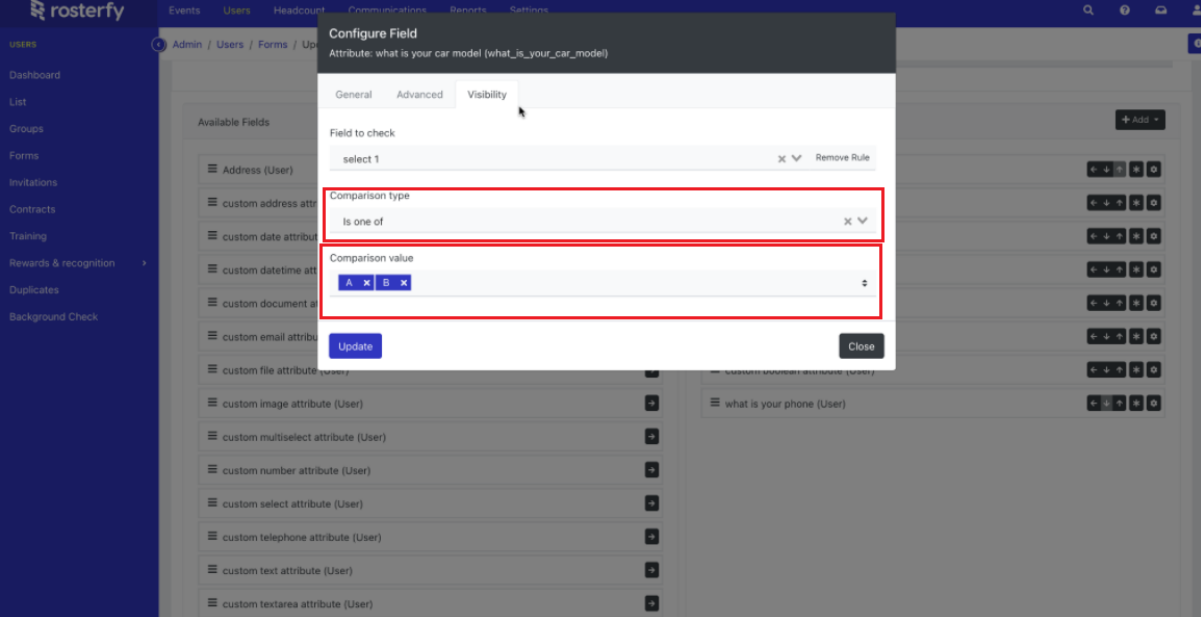
- Sending Emails
- Running Reports
- Bulk Updates within the Admin site

Forms

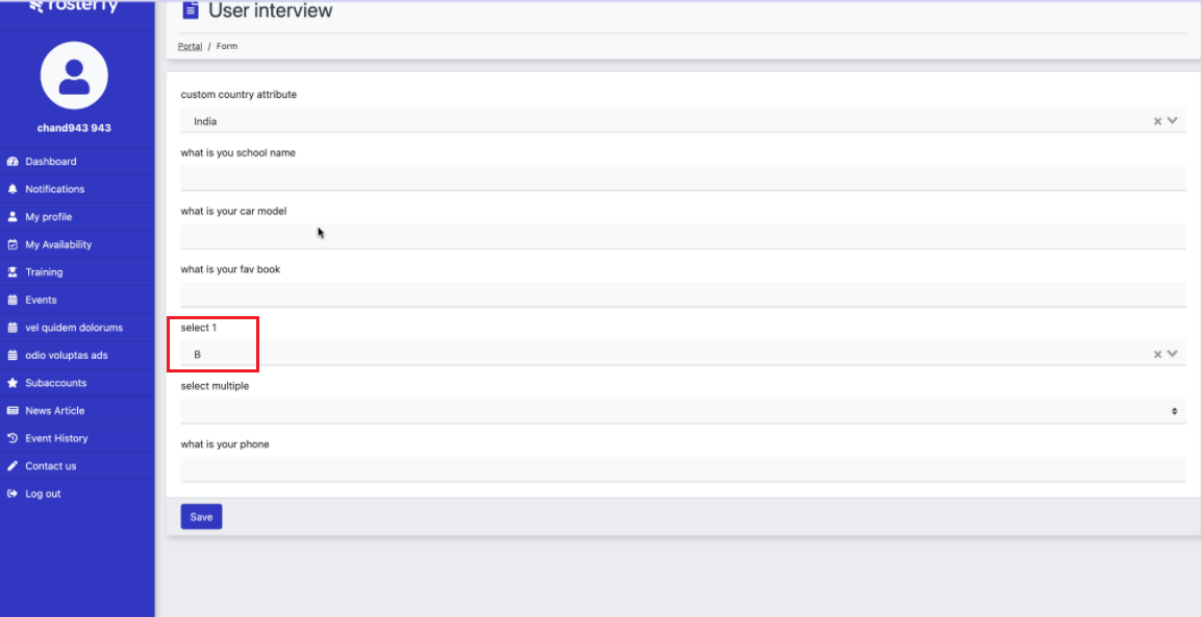
'Is one of' Option included as Form Field Option

The option has been added for forms, 'is one of' - this will allow the multi-field question response to be deemed correct if any one of the multiple options selected is picked (one of many options may be correct).

i.e. in the example screenshot below, if either one of the options 'A' or 'B' is selected, this form response will be deemed correct.



The screenshot shows the 'Configure Field' dialog box in the Rosterfy admin interface. The dialog is titled 'Configure Field' and has tabs for 'General', 'Advanced', and 'Visibility'. The 'General' tab is active. It shows 'Attribute: what is your car model (what_is_your_car_model)'. Under 'Field to check', it says 'select 1'. Under 'Comparison type', it says 'Is one of'. Under 'Comparison value', it shows 'A' and 'B' separated by a comma. There are 'Update' and 'Close' buttons at the bottom.



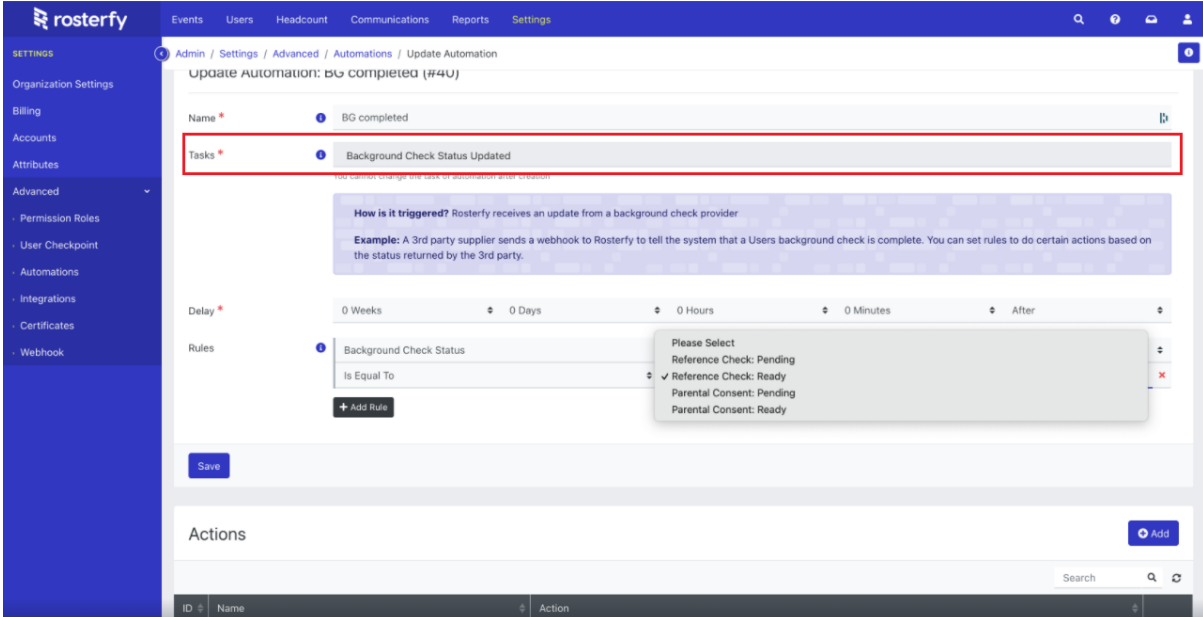
The screenshot shows the 'User interview' form in the Rosterfy admin interface. The form is titled 'User interview' and has a 'Portal / Form' header. It contains several fields: 'custom country attribute' with a dropdown showing 'India', 'what is your school name', 'what is your car model', 'what is your fav book', 'select 1' with a dropdown showing 'B', 'select multiple', and 'what is your phone'. There is a 'Save' button at the bottom.

Headcount

New Background Check Automation Trigger

The recently released Background Check has automations attached. When the Background Check status is updated (i.e. when the Background Check updates, is complete, etc.).

This means automation actions, such as email notifications, may now be configured to run off this new automation trigger.



rosterfy Events Users Headcount Communications Reports Settings

SETTINGS Admin / Settings / Advanced / Automations / Update Automation

Update Automation: BG completed (#40)

Name * BG completed

Tasks * Background Check Status Updated

You cannot change the task or automation after creation

How is it triggered? Rosterfy receives an update from a background check provider

Example: A 3rd party supplier sends a webhook to Rosterfy to tell the system that a Users background check is complete. You can set rules to do certain actions based on the status returned by the 3rd party.

Delay * 0 Weeks 0 Days 0 Hours 0 Minutes After

Rules Background Check Status

Is Equal To

+ Add Rule

Please Select
Reference Check: Pending
✓ Reference Check: Ready
Parental Consent: Pending
Parental Consent: Ready

Save

Actions

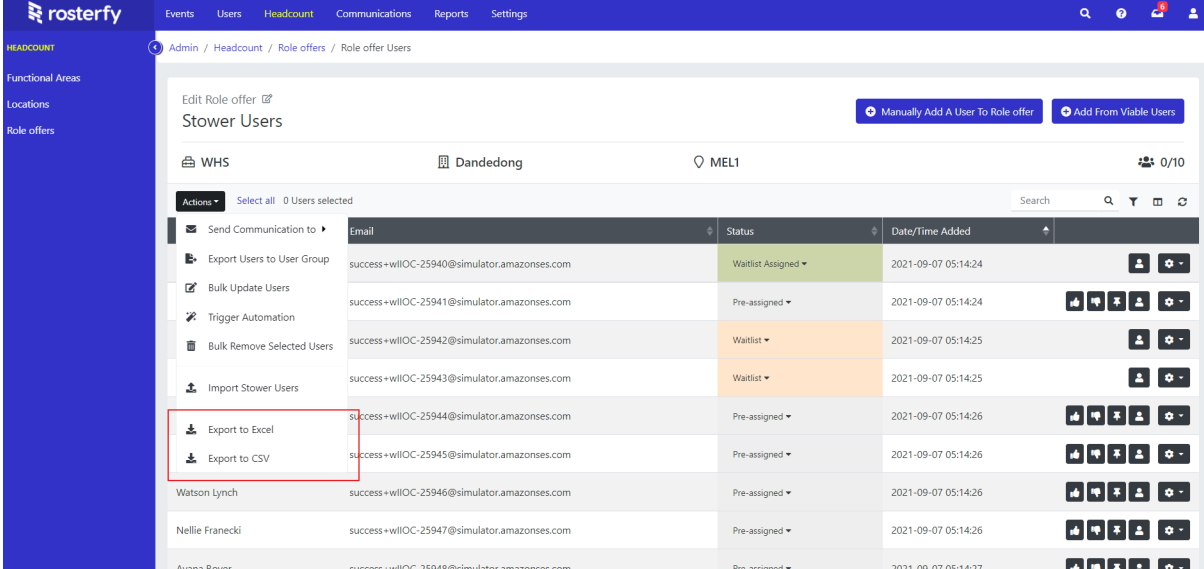
Add

Search

ID	Name	Action
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Role Offer User List Export Option

Under the Headcount Module, Role Offer User Lists (the list of users under a Role Offer) is able to be exported now, as per screenshot below.



The screenshot displays the Rosterfy interface for managing Role Offers. The top navigation bar includes links for Events, Users, Headcount, Communications, Reports, and Settings. The left sidebar shows the 'HEADCOUNT' section with options for Functional Areas, Locations, and Role offers. The main content area is titled 'Edit Role offer' and 'Stower Users'. It features a table with columns for Email, Status, and Date/Time Added. The table lists several users with their email addresses and status (e.g., Waitlist Assigned, Pre-assigned, Waitlist). A red box highlights the 'Export to Excel' and 'Export to CSV' options in the left sidebar. The table also includes a search bar and a 'Select all' button.

Email	Status	Date/Time Added
success+wlIOC-25940@simulator.amazonses.com	Waitlist Assigned	2021-09-07 05:14:24
success+wlIOC-25941@simulator.amazonses.com	Pre-assigned	2021-09-07 05:14:24
success+wlIOC-25942@simulator.amazonses.com	Waitlist	2021-09-07 05:14:25
success+wlIOC-25943@simulator.amazonses.com	Waitlist	2021-09-07 05:14:25
success+wlIOC-25944@simulator.amazonses.com	Pre-assigned	2021-09-07 05:14:26
success+wlIOC-25945@simulator.amazonses.com	Pre-assigned	2021-09-07 05:14:26
Watson Lynch	Pre-assigned	2021-09-07 05:14:26
Nellie Franecki	Pre-assigned	2021-09-07 05:14:26
Avaana Rruer	Pre-assigned	2021-09-07 05:14:27

Payroll

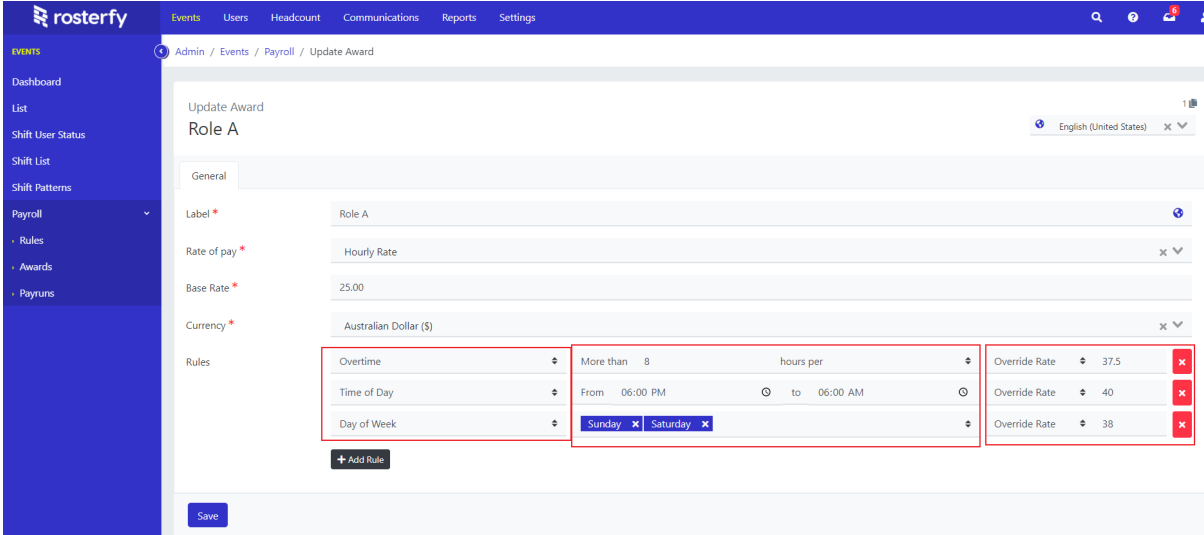
3 New Hourly Payroll Rules

Within the Payroll module, Admins can now set up 3 new Hourly Rate Payroll Rules, under Payroll Awards. Note that, when multiple rules are hit, the highest amount will be taken. You cannot combine rules, each is separate.

As per the screenshot below, these new options are:

- Overtime - same as prior Overtime rates, but you can add more than one. i.e. after 8 hours rate A, then after 12 hours rate B
- Time of Day - based on the time of day between two values you can define
- Day of Week - based on the day of the week (0000h - 2359h) that the time is in

Please speak to your CS manager for more assistance in setting this up.



Update Award

Role A

English (United States)

General

Label * Role A

Rate of pay * Hourly Rate

Base Rate * 25.00

Currency * Australian Dollar (\$)

Rules

Overtime	More than 8 hours per	Override Rate 37.5
Time of Day	From 06:00 PM to 06:00 AM	Override Rate 40
Day of Week	Sunday Saturday	Override Rate 38

+ Add Rule

Save

Integrations

Hubspot Integration

We have built in the option for connecting with Hubspot for an inbound (Hubspot -> Rosterfy) integration. You will need to add the integration in Settings > Advanced > Integrations as per all of the other Integrations, and connect via logging into your Hubspot account.

Please speak to your CS manager for assistance in setting this up.

